

# Accelerating Innovation

## Wee-Meng, Thoo

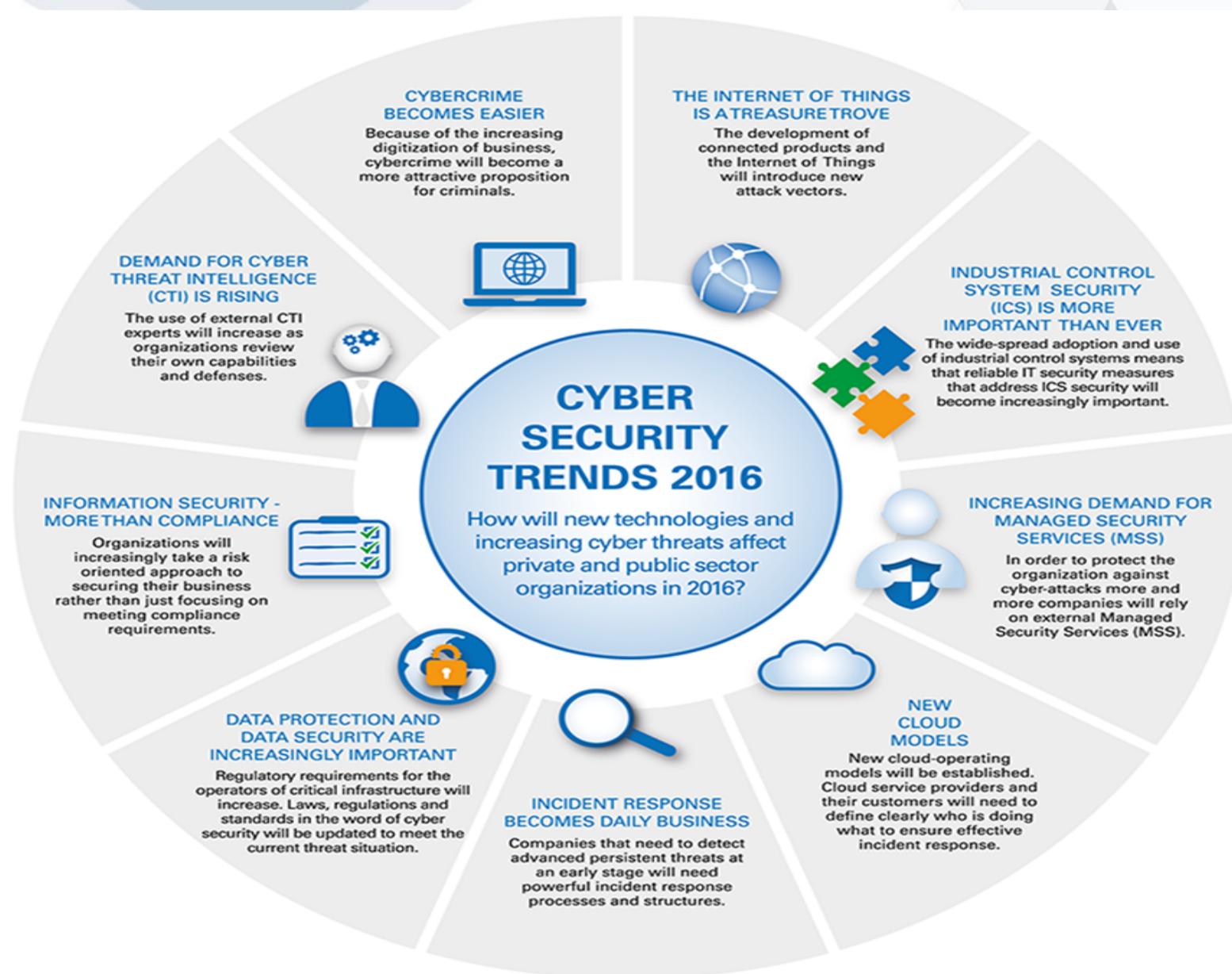
Head Of Innovation Initiatives, APAC – CSA APAC

Head of Investments, TMT Sector – Leonie Hill Capital

# 01

## Agenda

- Trends in Innovation
  - Start-ups Scene
  - Merger and Acquisition Landscape
  - CSA APAC Innovation Initiative
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<http://go.openskycorp.com/cyber-security-trends-2016>

# How Tech Companies Prepare for Cyber Attacks

**98%** Of small and mid-size technology and healthcare companies are maintaining or increasing resources devoted to cybersecurity this year, preparing for when, not if, cyber attacks occur.

**50%** Are increasing their spend, and investing in active response, not infrastructure.

**76%** Say cyber attacks threaten serious business interruption.

**78%** Say their data and IP are threatened.

Just **35%** Are completely or very confident in the security of their company information.

**54%** Of non-security companies have or plan to add a cybersecurity component to their product.

## Most Common Cybersecurity Resource Investments

Monitoring/Assessment

**18%**



Policies/controls

**15%**



Hiring

**12%**



Software

**8%**



Firewalls

**8%**



Authentication/Access

**6%**



Encryption

**6%**



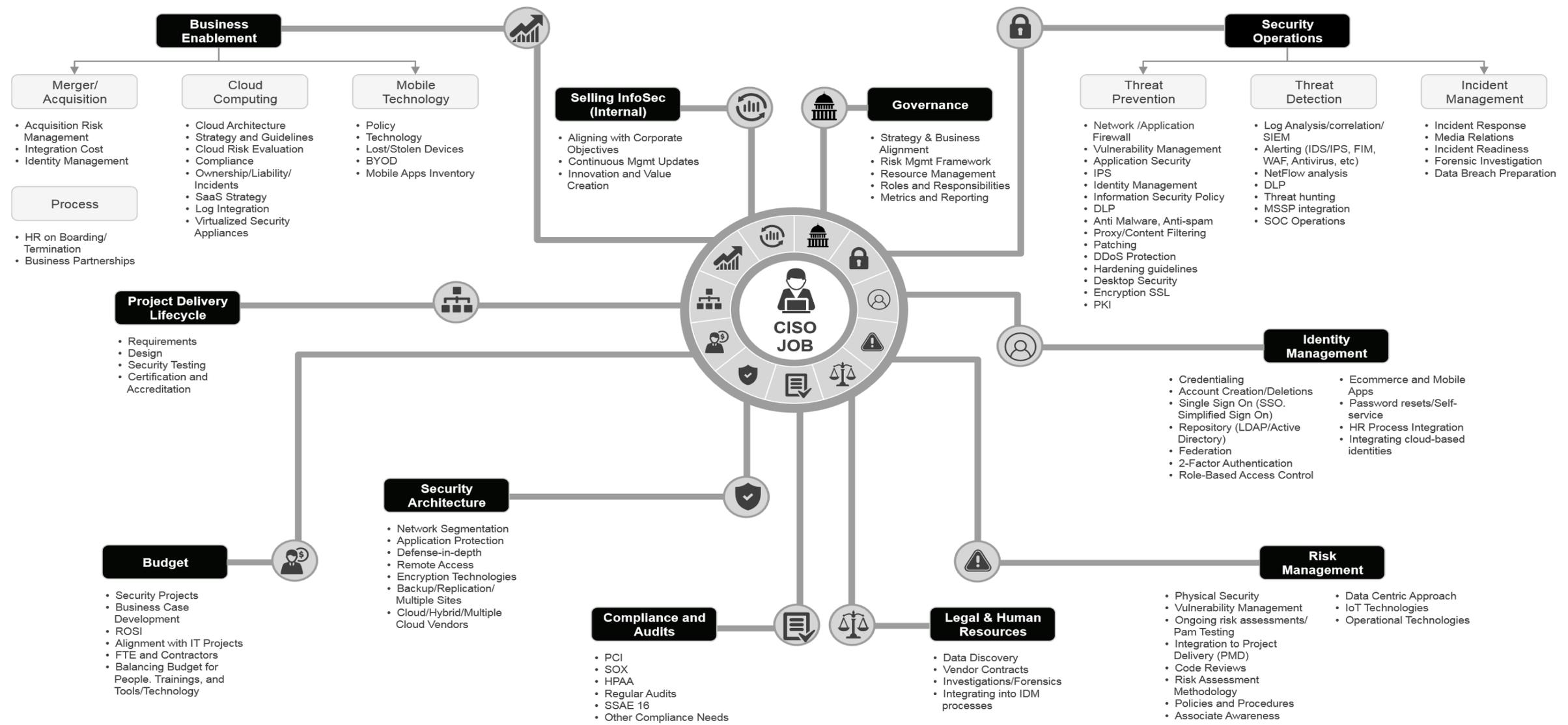
**52%**

Are storing their info **privately**, not in the public cloud.

**46%**

Say media attention has increased awareness of the issue.

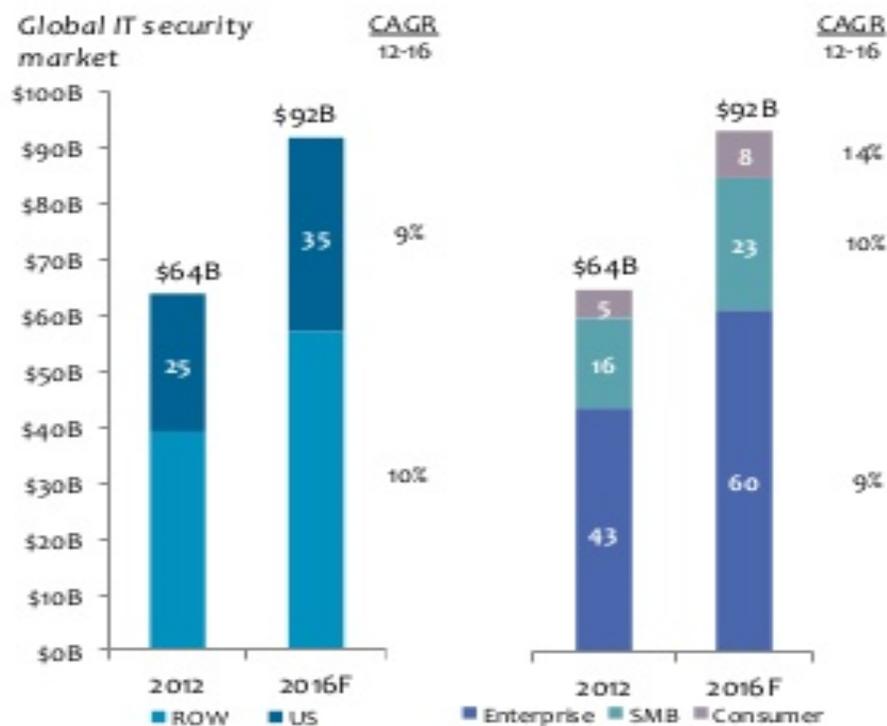
# CISO Mind Map: An Overview of The Responsibilities and Ever Expanding Role of The CISO



Source: <http://rafeeqrehman.com/2015/05/17/the-latest-2015-ciso-mindmap-is-here/>

# Global IT security market growing to \$92B with strong consolidation trend

## GLOBAL IT SECURITY MARKET



## LEADING COMPANIES AND EXITS

### Identity theft protection



### Anti-virus and corporate security



### Identity and authentication





# CYBERSECURITY MARKET MAP

## IOT/ IIOT SECURITY

ARGUS MOCANA  
 BAYSHORE Trillium  
 Indegy CyberX  
 Bastille zscaler  
 PWNIE EXPRESS THETARAY NEXDEFENSE  
 Rubicon SECURE RF ForeScout

## THREAT INTELLIGENCE

THREATCONNECT NSS LABS  
 ZEROFOX LOOKINGGLASS  
 Synack ANOMALI  
 FLASHPOINT 4iQ THREATQUOTIENT  
 SKYBOX SECURITY eclectic iq patternex  
 ds\_ SecurityScorecard ALIEN VAULT

## NETWORK & ENDPOINT SECURITY

Centrify LogRhythm  
 TANIUM IONIC SECURITY VENAFI ENSILO  
 red canary CODE42 fireglass  
 Barkly DIGITAL GUARDIAN VERACODE  
 CROWDSTRIKE CounterTack  
 Twistlock PHISHME  
 THINAIR CLOUDFLARE  
 nexthink SentinelOne Br  
 Cb CYLANCE vARMOUR mojo

## MOBILE SECURITY

Lookout bitglass OPENPEARL  
 AppDome okta  
 avast! TRUSTLOOK appthority  
 wickr Skycure Workspot  
 silent circle ZIMPERIUM



## BEHAVIORAL DETECTION

perimeterx LIGHTCYBER esentire DARK TRACE

## DECEPTION SECURITY

illusive ENDGAME AREA 1 Cymmetria TRAPX SECURITY

## RISK REMEDIATION

SafeBreach UpGuard ATTACKIO REDSEAL

## CONTINUOUS NETWORK VISIBILITY

tenable network security cybereason packetSled  
 PROTECTWISE CENTRIPETAL NETWORKS VECTRA

## QUANTUM ENCRYPTION

Post-Quantum IDQ uIntelligence HANNO-METRA

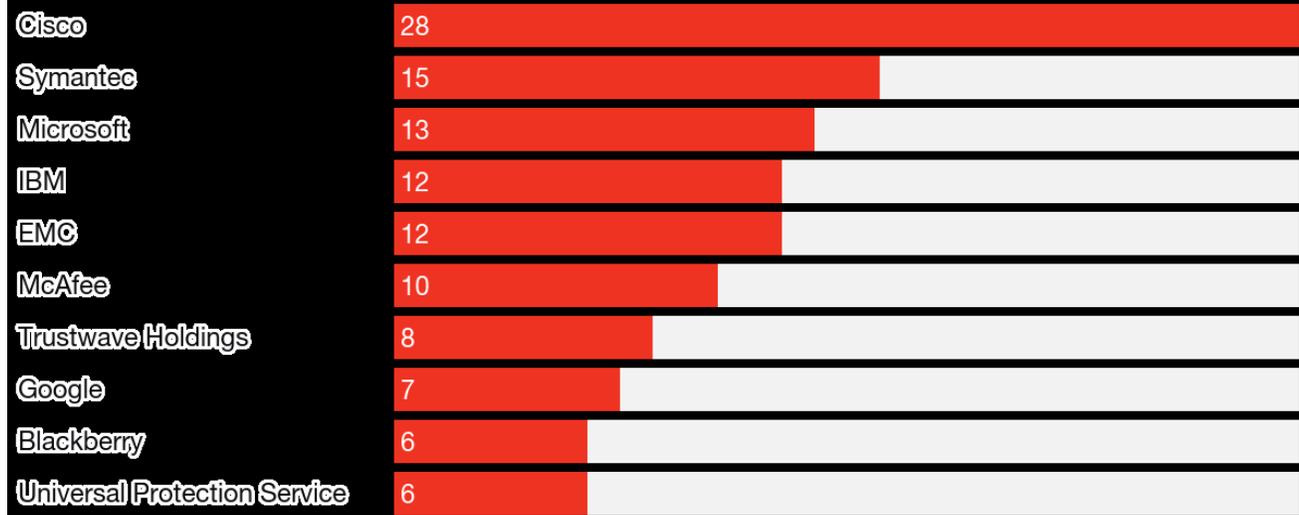
## WEBSITE SECURITY

SH-PE distil networks



# Top 10 Cybersecurity Startup Acquirers

These companies buy more cybersecurity firms than any others, according to CrunchBase data.



Source: CrunchBase



## Cybersecurity Deals

Target	Buyer/Backer	Value
Allied InfoSecurity	Delta Risk	N/A
Arellia	Thycotic	N/A
Blue Coat Systems	Symantec	\$4.65B
Coalfire Systems	Carlisle/Chertoff Group	N/A
DeviceAuthority	Cryptosoft	N/A
Imprivata	Thoma Bravo	\$544M
Intercom Consulting & Federal Systems	Belcan	N/A
iSight Partners	FireEye	\$275M
Kount	CVC Capital	\$80M
L-3 National Security	Caci International	\$550M
Maglan	Accenture	N/A
Trustev	TransUnion	\$44M

Source: Mergers & Acquisitions

# Cybersecurity Deal Dashboard

**\$3.01 Billion**  
Financing Volume YTD

**145**  
Financing Transactions YTD

**\$8.69 Billion**  
M&A Volume YTD

**75**  
M&A Transactions YTD

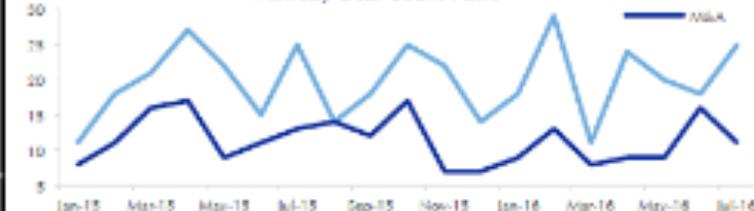
## Top Financing Transactions YTD

Date	Company	Amount (\$M)
1/13/16	STORAGECRAFT	107
7/25/16	StackPath	180
6/8/16	EYLANCE	100
2/3/16	IBKYEBCDC SECURITY	96
1/21/16	ForeScout	76
1/26/16	pindrop	75
7/3/16	DARKTRACE	64
7/15/16	silent circle	50

## Financing Activity



## Monthly Deal Count Pulse



## M&A Activity



## Top M&A Transactions YTD

Target	Acquirer	Amount (\$M)
BLUE COAT	Symantec	4,772
AVG	QVCoff	1,453
Pingidentity	VeriSign	600
Imprivata	THOMSON BROW	486
CSID	Experian	360
CloudLock	citibank CISCO	293
Securix	FireEye	275
Resilient	IBM	100

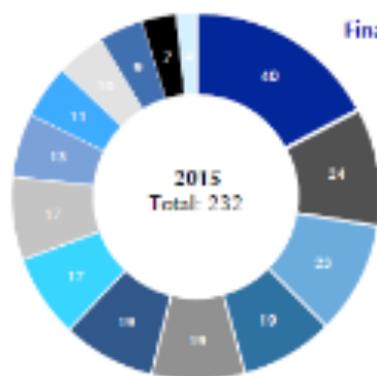
## Public Comps



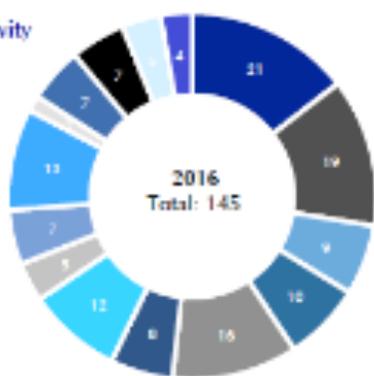
## M&A EV/Rev Multiples



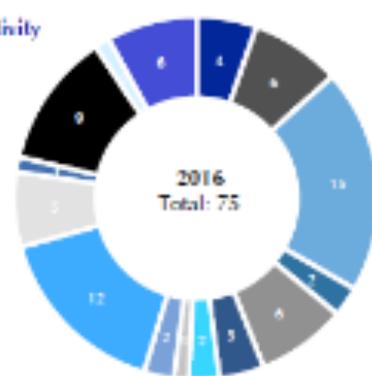
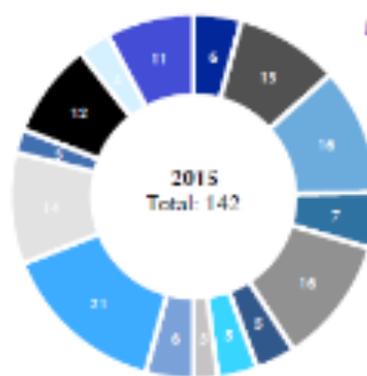
- Specialized Threat Analysis & Protection
- Threat Intel / GeoOps / IR
- Identity & Access Management
- Cloud Security
- Data Security
- Mobile Security
- Endpoint Security
- Fraud Prevention / Transaction Security
- Application Security
- Risk & Compliance
- Web Security
- Industrial / IOT Security
- Network Security
- Messaging Security
- VOIP



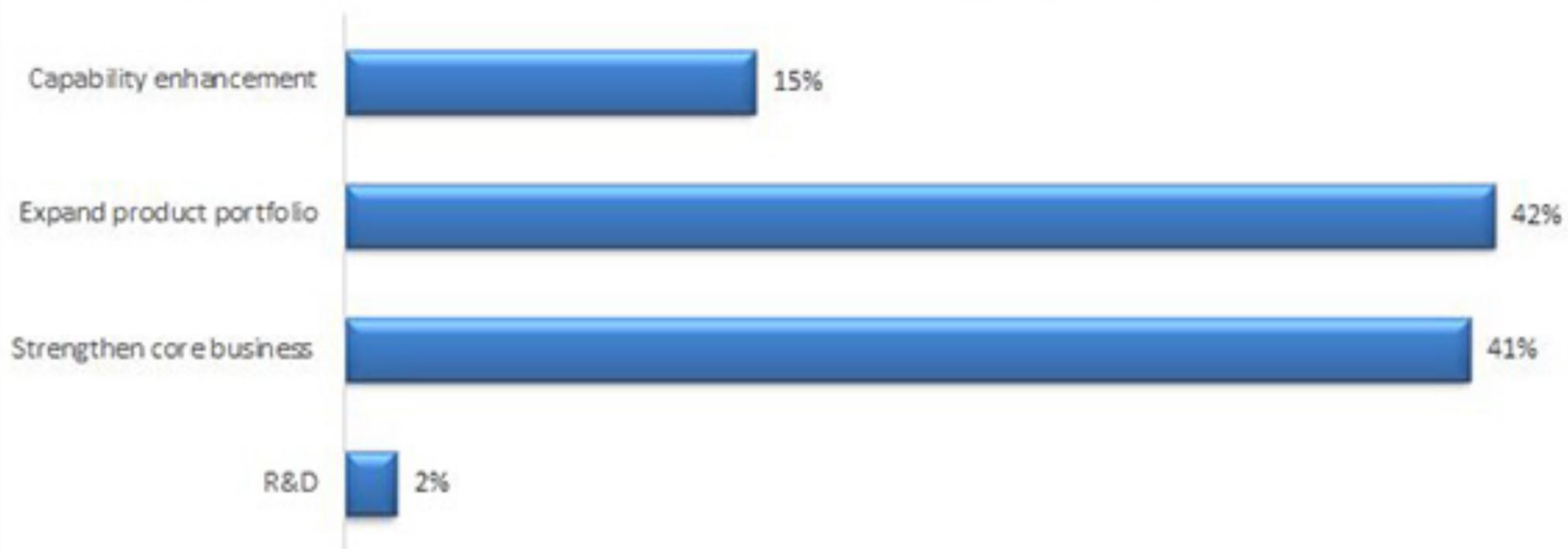
## Financing Activity



## M&A Activity



## Objective for M&A in Cyber Security Market in 2014 & 2015



Source: MarketsandMarkets Analysis

# CSA APAC Innovation Initiatives

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**Assist Cybersecurity Startups and SMEs in forging Partnerships in the Industry through CSA network of :**

Executive Members

Enterprise User Members

Solution Provider Members

Member Profiles: Cloud providers, tech leaders, security industry, Global 2000 enterprise users of cloud



# Through Chapters

## 75 + Chapters Worldwide

Extension of CSA Global

Opportunities to Network with Peers

Local Events

Summits

Research (Areas of Focus)

<https://cloudsecurityalliance.org/chapters/>



# A sample of our corporate members



# CSA Innovation Accelerator (CIA)

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Singapore 1<sup>st</sup> Cybersecurity co-working space– offers some of Asia’s most promising entrepreneurs the training necessary to build and grow a successful cyber security company.

- supports more advanced cyber security companies looking to take their businesses to the next level. Access the benefits of CSAs unique network and expertise whilst they focus on business and product development
- aimed to educate cybersecurity startups, receive personal guidance and support from an accomplished network of mentors,
- help to scale globally and finally build a cybersecurity ecosystem and community in Singapore, which didn't exist at this point of time.
- our programme culminates with CSA Summits, allowing participants to present their products, progress and potential to a range of partners and investors.
- regularly invites different global Cybersecurity leaders and tech stars to Singapore
- issues articles, analytics and reports about cybersecurity and promotes Singapore as a the leading cybersecurity hub in the world

# CSA Innovation Accelerator (CIA)

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For Start-ups & Scale-up CyberSecurity Companies

**CSA CIA Applications are NOW OPEN**

First program dedicated to both start-ups and scale-up global Cybersecurity companies aiming to capture the Asian growth market.

The program leverages on CSA's APAC traditional strength as Asia's partners and technology gateway. Apply [here!](#)

***[csa\\_apacii@cloudsecurityalliance.org](mailto:csa_apacii@cloudsecurityalliance.org)***

A background image showing a close-up of two hands shaking in a firm grip, symbolizing a business deal or agreement. The hands are wearing dark blue suit sleeves with white cuffs. To the right, a person's hand is holding a black tablet computer. The image is overlaid with a dark blue diagonal graphic element.

**THANK YOU**

**Wee-Meng, Thoo**  
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