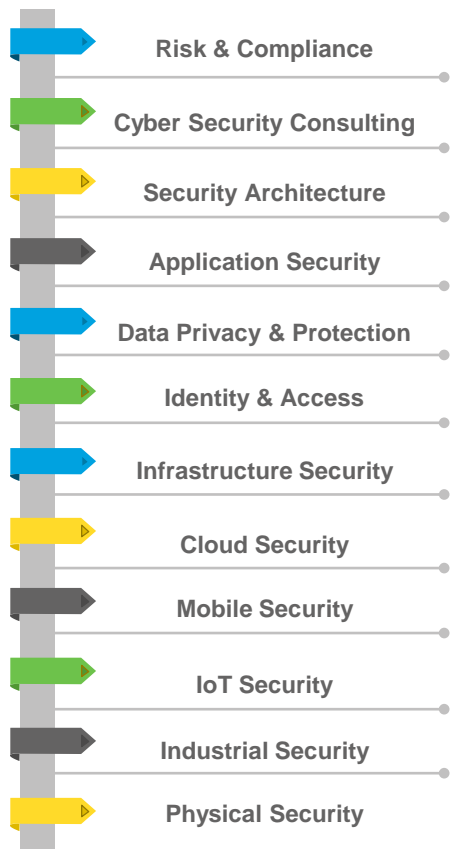




# Cybersecurity & Risk Services in India

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# Cybersecurity & Risk Services Overview



**593 CUSTOMERS**  
FORTUNE 1000  
ENTERPRISES



**7500+**  
**PRACTITIONERS**  
CYBER SEC. & RISK  
EXPERTISE



**TOP 5 WORLD  
LEADER**  
END-TO-END PROVIDER



**10 PLATFORMS**  
FOR CYBER  
DEFENSE



**VENTURE  
INVESTMENTS  
AND STRATEGIC  
PARTNERSHIPS**

## Consulting & Strategy

- Cybersecurity Consulting
- Risk & Compliance Management
- Data Privacy Assessment

## Design & Implement

- Security Architecture
- Protection of Digital Trust
- Application Security Assurance
- CloudTrust Framework

## Managed Services

- Managed Security Services
- Automated Breach Detection & Incident Response
- Cybersecurity Intelligence

## As-a-service

- Cyberdefense Center



**26%**  
YoY GR



**579 MN**  
Revenue



**12**  
Global SOCs



**14**  
Security Awards  
in 2017-18



**\$ 1 BN**  
**2020 VISION**

## Strategy LEVERS

- Enable Digital Trust
- Expand Cyber Intelligence
- Modernize Core
- Elevate Security
- Collaborate to Win

# Strategic investments (Intelligence, Automation, Assurance & Analytics)

**emailage**<sup>™</sup>  
GLOBAL FRAUD PREVENTION

A fraud risk solution that uses email addresses as an unique data-point and uses millions of fraud signals and data science

**VECTRA**<sup>™</sup>

Real-time Continuous threat monitoring across the Network and the Data Center to instantly identify any phase of a cyber attack.

**Intsights**

Deep, Dark Web and Clear Web mining with Actionable Insights into Enterprise Specific Alerts

**DEMISTO**

A security automation and orchestration platform that integrates with the enterprise security technologies to Automate Information Exchange, Actions to drive Cyber Incident Response, Investigation and Remediation



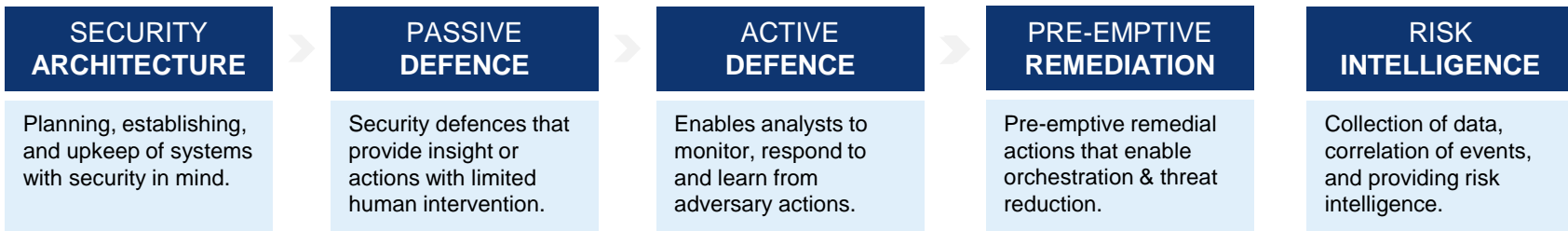
**DENIM GROUP**

Denim Group is a leading application security firm, serving as a trusted advisor to customers on matters of application risk and security.. Denim Group's flagship ThreadFix platform accelerates the process of application vulnerability remediation,

**CYCOGNITO**

A continuous and real time attack surface analysis and remediation platform. Cycognito enables security teams to eliminate critical attack vectors

# Spending Trends to Manage Cyber Risks



2010



Current State



- Secure by design
- Risk based controls
- Data Centric & Content Centric Controls

- North-South Traffic Monitoring  
Malware Ops
- East-West Traffic Monitoring  
Unsupervised ML

- Automated Security Orchestration & Reporting
- Automated Security Incident Response

- Big Data Analytics
- Cognitive based Risk Management



# Cyber Security Business Potential in India

Indian security market to touch **\$1.69 billion** by 2019 with a growth rate of **8.1%**

India and US have the largest Cyber Security talent pool right now (**16% each**), according to Capgemini's –The Big Gap in Cyber Protection report, 2018

Cybersecurity is a high focus area for Government of India and has initiated various cybersecurity programs like Cyber Surakshit Bharat to strengthen cybersecurity ecosystem in India in line with Government's vision for a 'Digital India'

Proposed Personal Data Protection Bill will trigger investments in data security across Private and Government sectors

Cybersecurity services revenue of the Top 6 India based SI Global Players is around **1.75 billion USD**



References: Gartner Forecast Information Security Worldwide, 2015-2021, <https://assets.kpmg.com/content/dam/kpmg/in/pdf/2018/06/Secure-in-India.pdf> , [https://www.capgemini.com/wp-content/uploads/2018/02/the-cybersecurity-talent-gap-v8\\_web.pdf](https://www.capgemini.com/wp-content/uploads/2018/02/the-cybersecurity-talent-gap-v8_web.pdf)

# Potential areas of collaboration





Thank you  
for your time

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