

A man and a woman in a server room looking at a laptop. The man is on the left, wearing a light blue shirt, and the woman is on the right, wearing a dark blazer and glasses. They are both smiling and looking at a laptop held by the woman. The background is a server room with rows of server racks and blue lighting. A large, dark blue, triangular graphic element is on the right side of the image.

# CAPITAL MARKETS EVENT

CYBER SECURITY | **MANAGED SERVICES**

nccgroup<sup>®</sup> 



## AGENDA

- Introducing Managed Services
- Market overview
- Our value proposition
- The Managed Services portfolio
- Market strategy
- Future growth

# YOUR SPEAKERS TODAY



**Kevin Brown**

Chief Operating Officer



**Doug Klotnia**

Managing Director -  
Global Managed Services



**Natalie Walker**

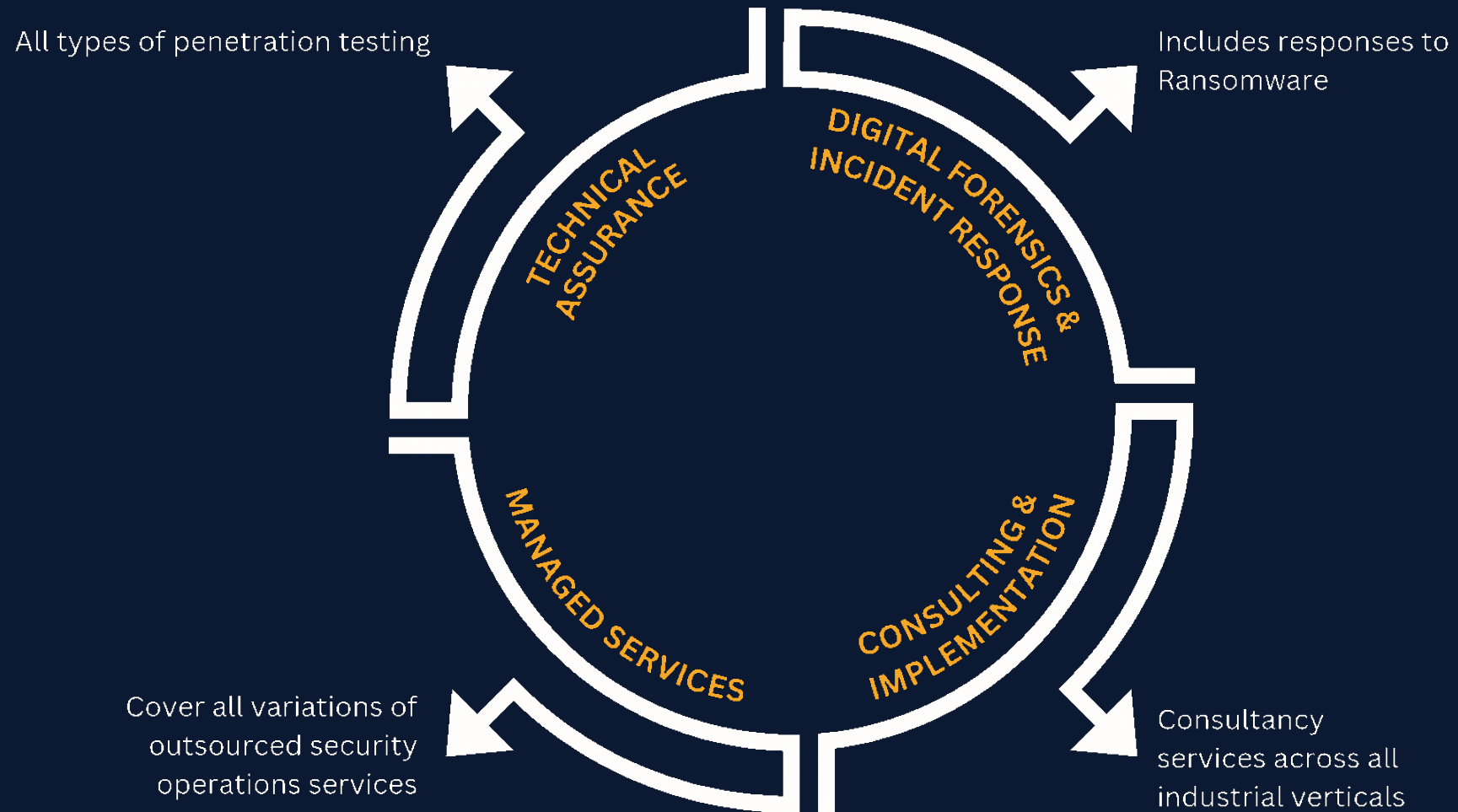
Director of Portfolio  
Management



**Kevin Jonkers**

VP Operations – Global  
Managed Services

# INTEGRAL PART OF NCC GROUP'S CYBER SERVICES






# AN INTRODUCTION

CYBER SECURITY | **MANAGED SERVICES**

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- 
- AI is everywhere
  - Defending against compromise is more complex than ever
  - We have a plan aligned to our market, underpinned by our people and technology

# MANAGED SECURITY SERVICES IS A COLLECTIVE TERM

Managed Security Services (MSS)  
cover all variations of outsourced  
security operations services.

SOURCE: IDC's Worldwide Security Services Taxonomy, 2023



# MANAGED SECURITY SERVICES IS BROAD AND CHANGING

“A basic service might include, for example, firewall management

More advanced services include a managed security operations centre monitoring multiple technologies.”



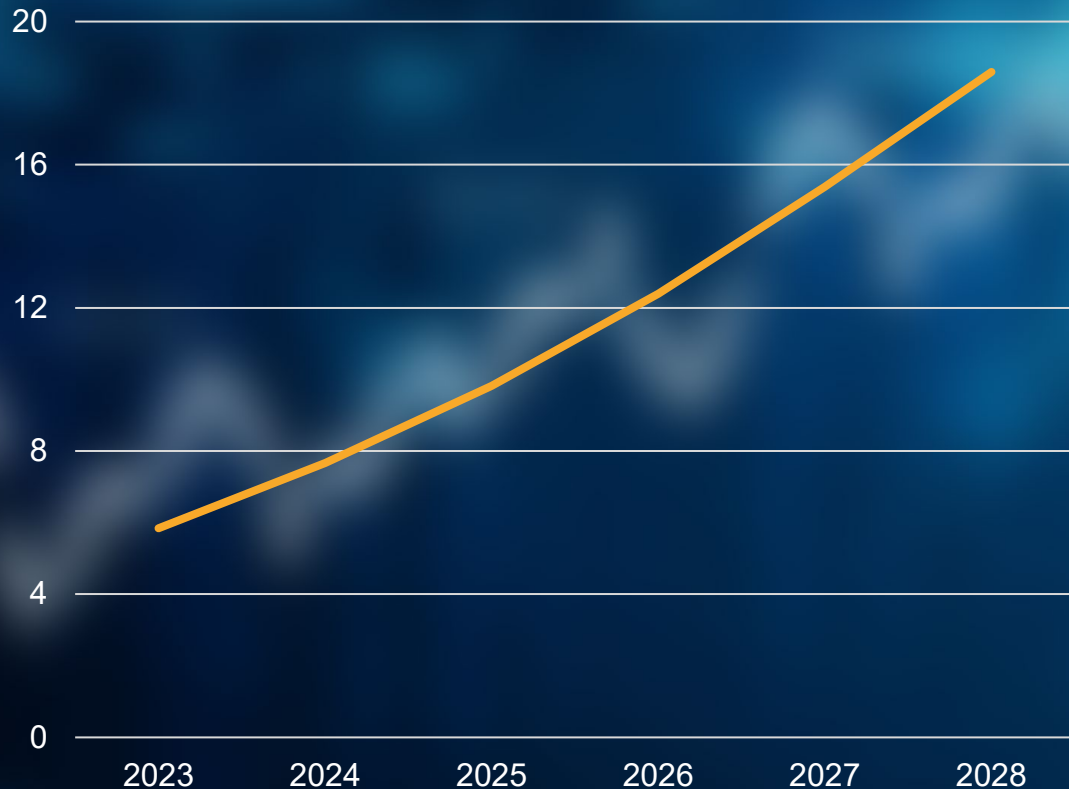




# FOCUSING IN ON THE HIGH GROWTH AREA OF MSS

Managed (Extended) Detection and Response – M(X)DR, as a subset of Managed Security Services, combines the tools, technologies, procedures, and methodologies used to provide full cyber security detection and response capabilities for an organisation.

Market Spend (£bn) with 26% CAGR



Source: IDC Market Spend MDR/MXDR

SOURCE: IDC's Worldwide Security Services Taxonomy, 2023

# MANAGED SERVICES COMPONENTS

FIND SENSITIVE DATA



**OXM**  
Online eXposure  
Management



**ASM**  
Attack Surface  
Management



**Vulnerability Scan**  
Testing & Scanning

ADD PROTECTION



**EDR**  
Endpoint Detection  
& Response



**NDR**  
Network Detection  
& Response



**XDR**  
eXtended Detection  
& Response

PRIORITISE AND  
TAKE ACTION



**SIEM**  
Security Information  
Event Management



**MDR**  
Managed Detection  
& Response



**MXDR**  
Managed eXtended  
Detection & Response

# WE UNDERSTAND OUR CLIENTS' CHALLENGES

They want:

- To **comply** with evolving regulation and **reduce cyber risk**
- **Insights** to prove effectiveness to stakeholders
- **Certainty of cost** and to maximise return on investment
- Someone to **identify and solve** their cyber problems

And they need it **quickly**

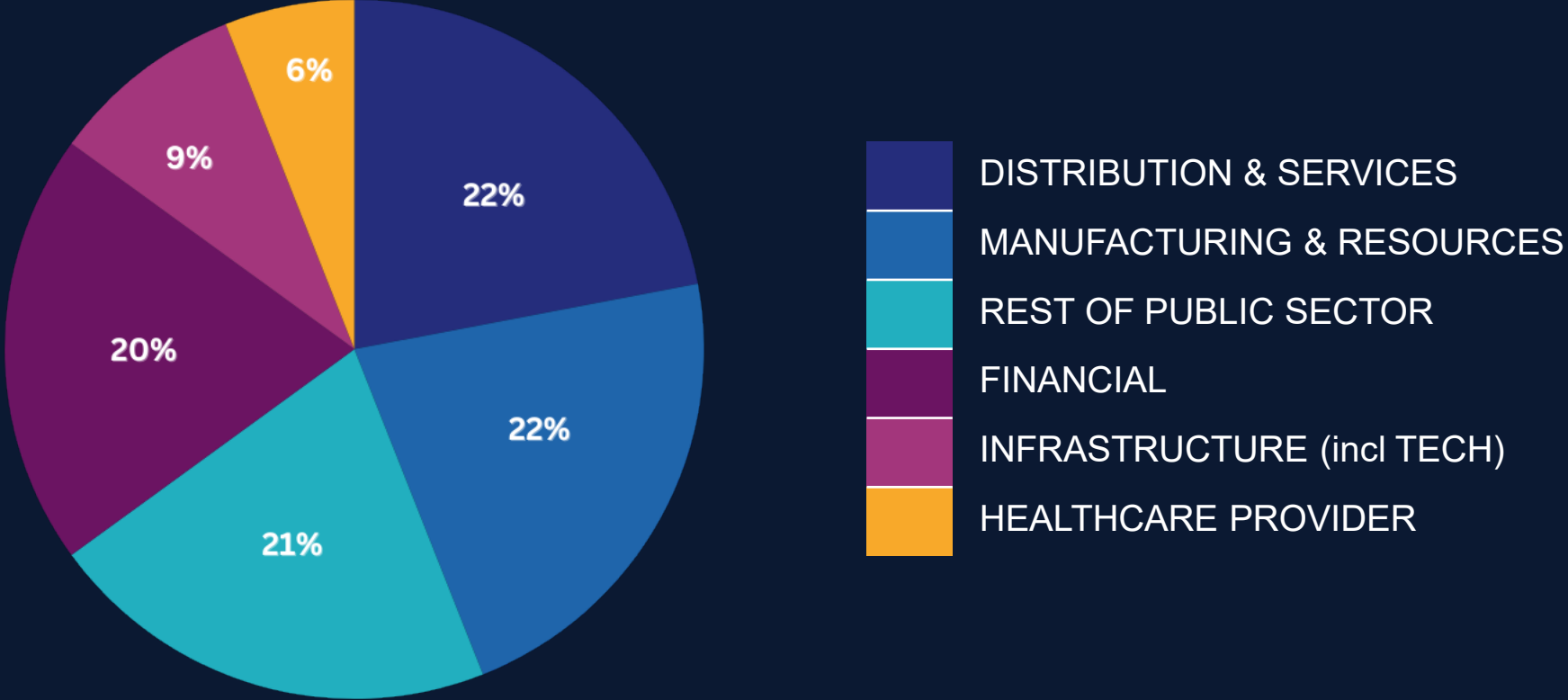


## MARKET OVERVIEW

CYBER SECURITY | **MANAGED SERVICES**

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# THERE IS OPPORTUNITY ACROSS ALL VERTICALS



Source: IDC Market Data 2023 (MSS Spend)

# DRIVEN BY AN EVER-COMPLEX THREAT LANDSCAPE

MXDR ANNUAL  
GROWTH RATE OF  
26.1% FROM 2023-28

MANAGED SECURITY  
SERVICES MARKET  
SIZE £20bn (2023)

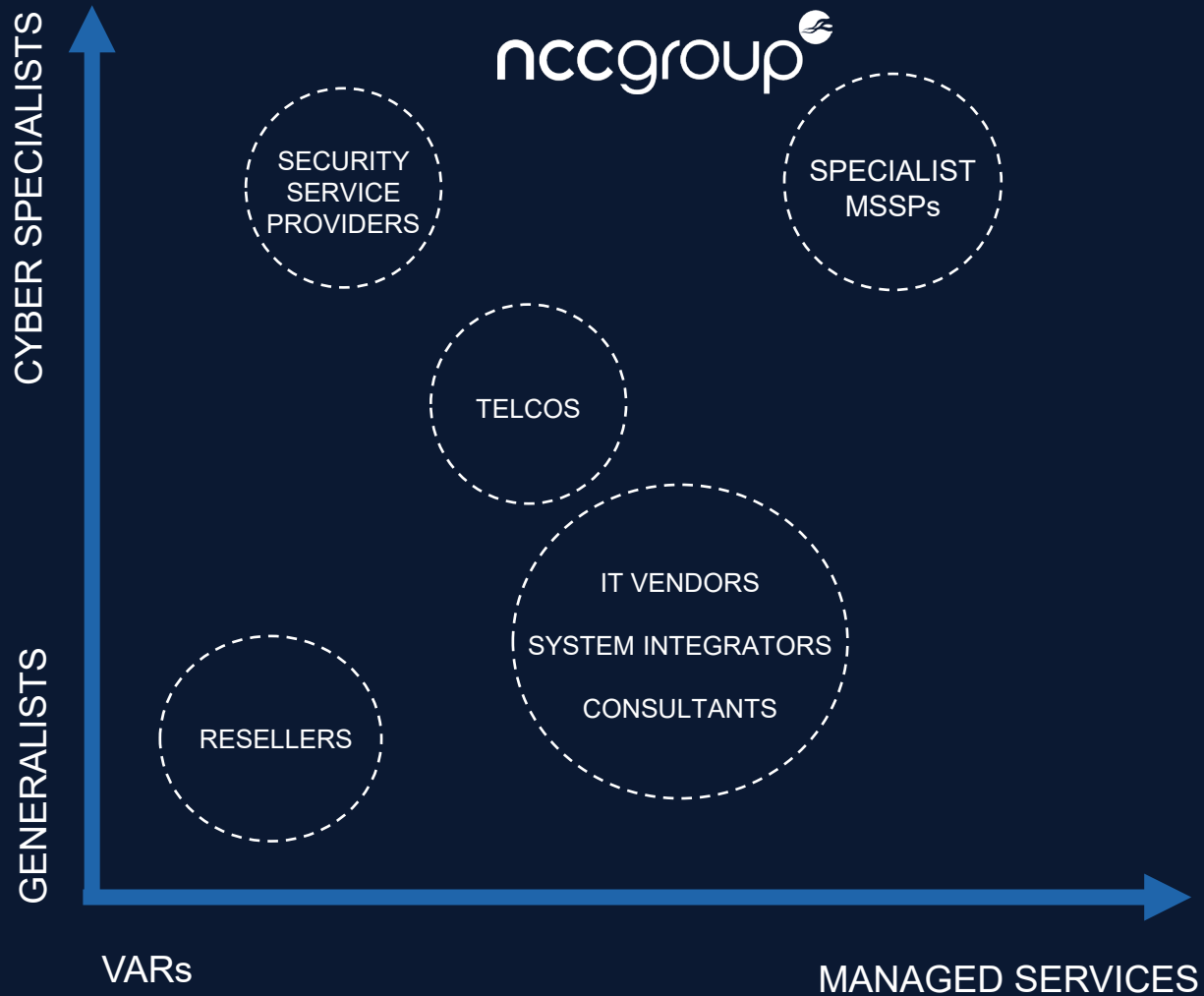
42% OF BUSINESSES  
USING MXDR

TOP TWO BUYER  
REQUIREMENTS  
ARE TRUST & EXPERTISE  
WITH COMPLIANCE

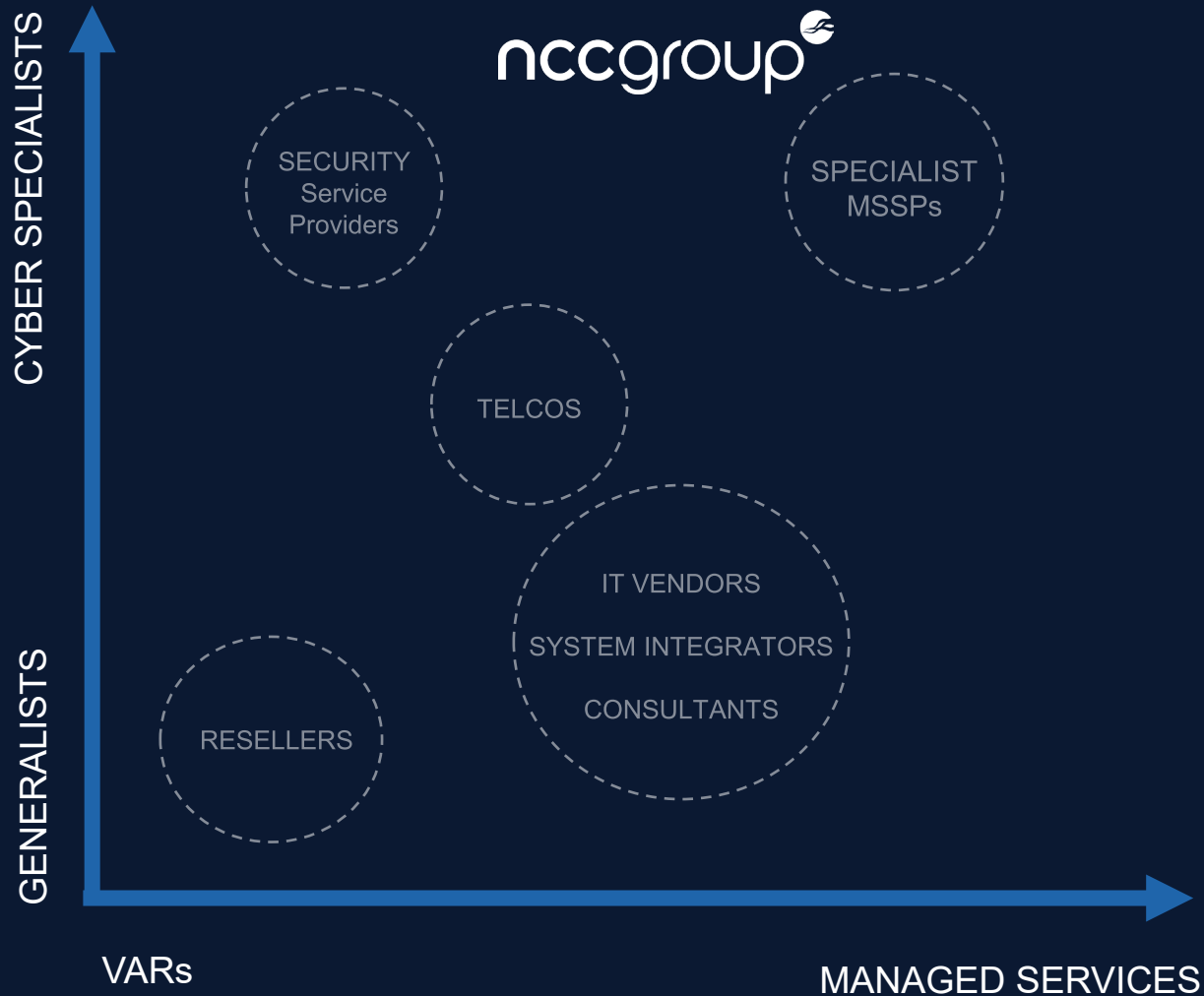
CLIENTS LACK  
RESOURCES  
TO MANAGE  
THEMSELVES

MANAGED SERVICES  
PROVIDES ECONOMIES  
OF SCALE

# NCC GROUP IS HIGHLY DIFFERENTIATED IN A DIVERSE MARKET



# NCC GROUP IS HIGHLY DIFFERENTIATED IN A DIVERSE MARKET



PURE PLAY CYBER WITH BREADTH OF SERVICES

GLOBAL SCALE WITH LOCAL PRESENCE

TECHNOLOGY AGNOSTIC WITH  
UNIFIED CYBER PLATFORM

STRENGTH OF PEOPLE EXPERTISE  
AND FOCUS ON QUALITY

INDUSTRY LEADING THREAT MANAGEMENT



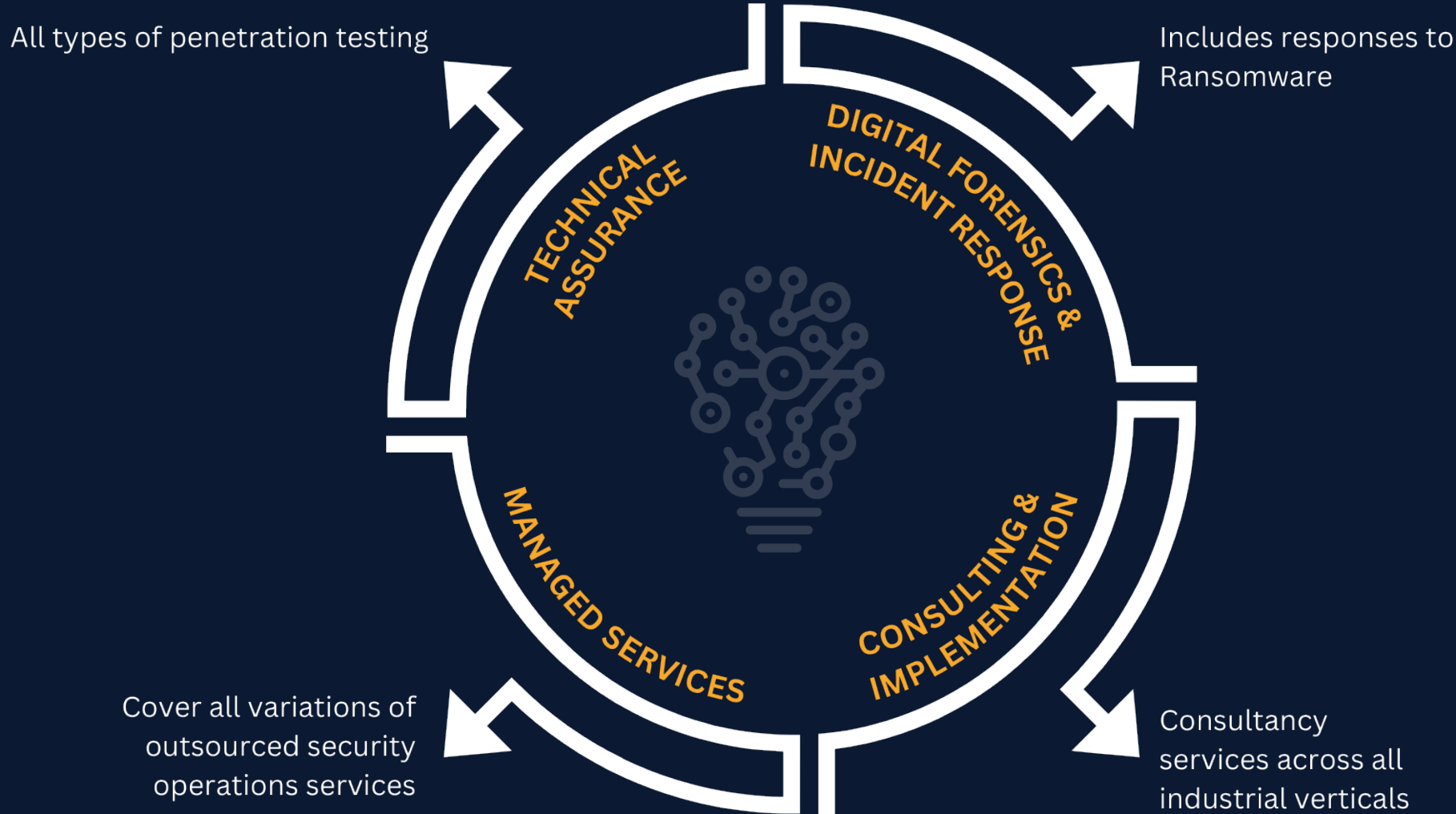


## OUR VALUE PROPOSITION

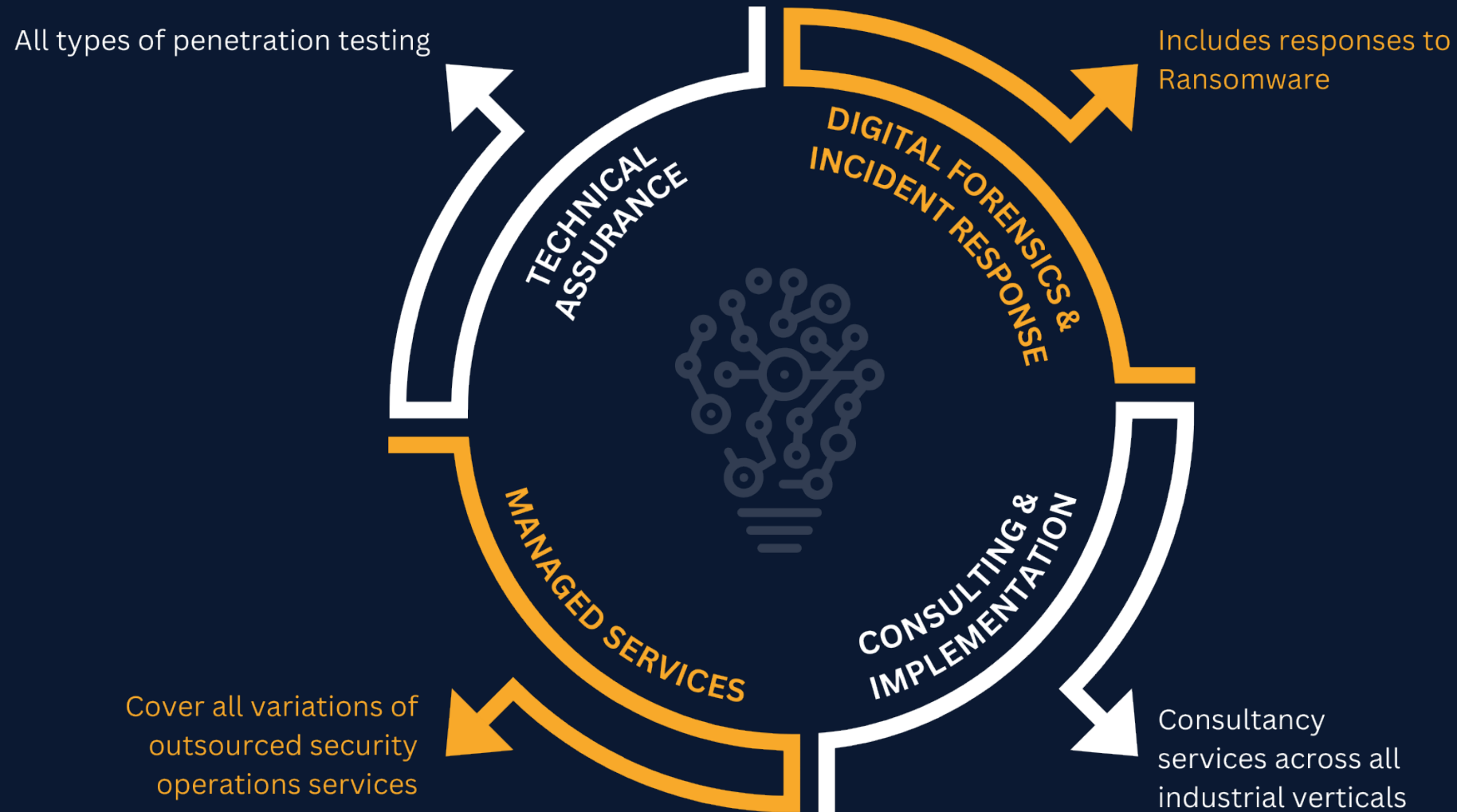
CYBER SECURITY | **MANAGED SERVICES**

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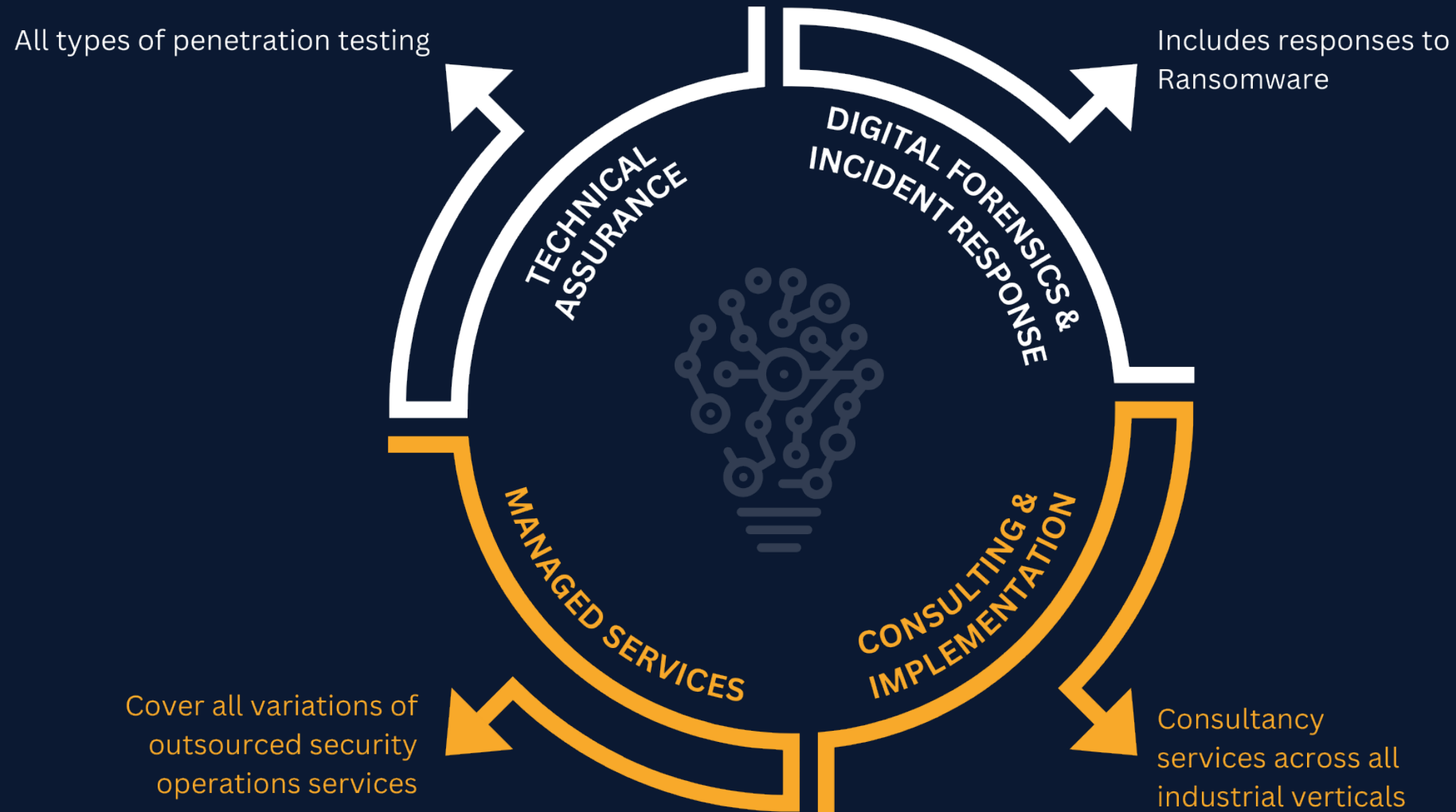
# INTEGRAL PART OF NCC GROUP'S CYBER SERVICES



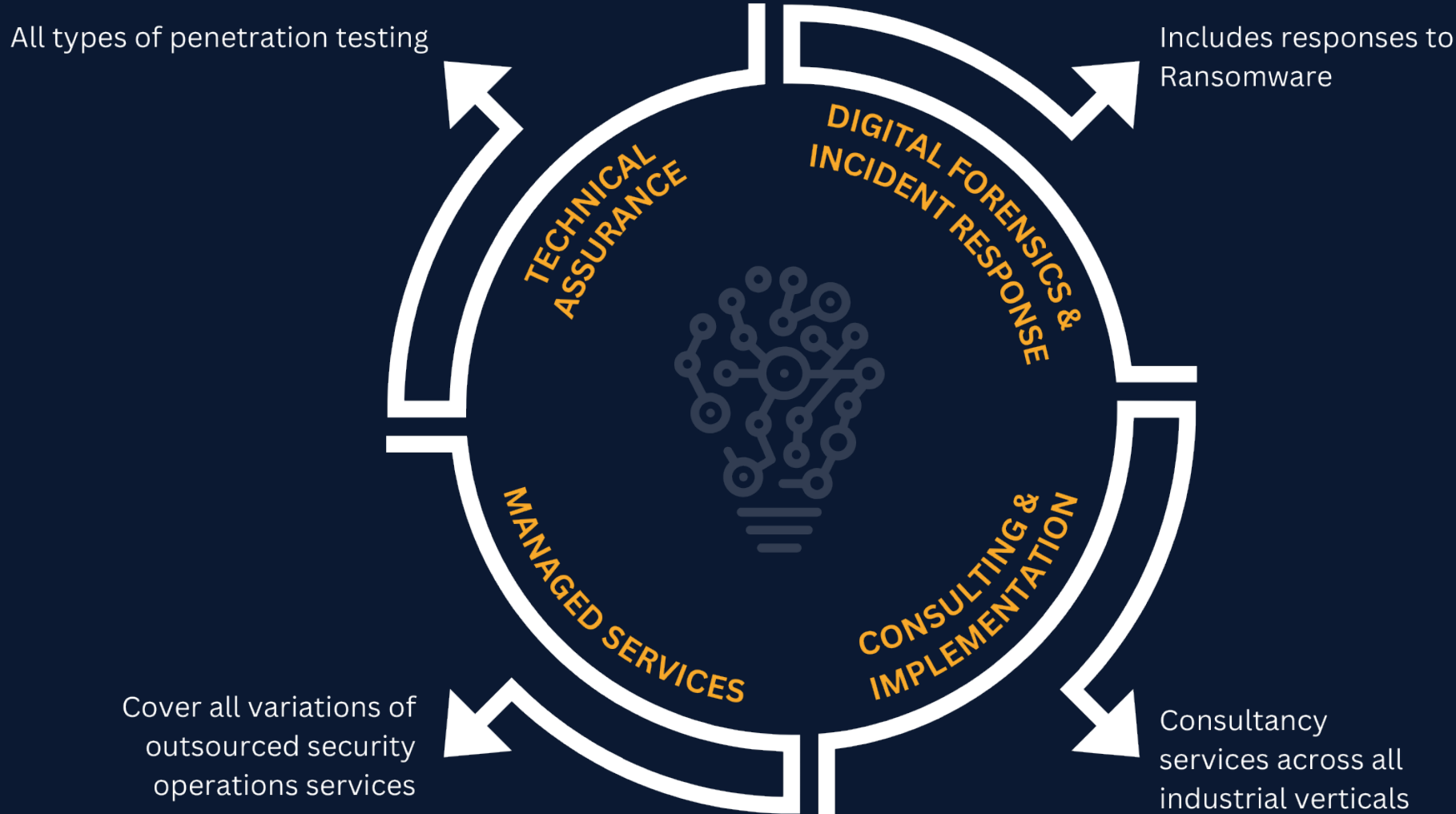
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# OUR MANAGED SERVICES COVER VULNERABILITY IDENTIFICATION THROUGH TO REMEDIATION



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# OUR MANAGED SERVICES COVER VULNERABILITY IDENTIFICATION THROUGH TO REMEDIATION



FIND SENSITIVE DATA

ADD PROTECTION

PRIORITISE AND TAKE ACTION

# SCALING EFFICIENTLY FOR CLIENTS



MID-MARKET



LARGE ENTERPRISE



VARIED NEEDS BUT ONE PORTFOLIO



## QUALITY AND CLIENT CENTRICITY

Our approach allows  
for unique delivery  
models aligned to each  
client's environment



## THREAT MANAGEMENT AND TRANSPARENCY

World class threat  
intelligence embedded in  
our real time detection and  
response, presented  
transparently, protecting  
clients uniquely to zero day  
and everyday threats



## PEOPLE POWERED INNOVATION

Our solution is powered  
by decades of collective  
experience and expertise  
to assess, manage  
and delivery solutions  
for our clients

# FOCUSED ON OUR STRENGTHS AND WHERE OUR CLIENTS NEED US

They want:

- To **comply** with evolving regulation and **reduce cyber risk**
- **Insights** to prove effectiveness to stakeholders
- **Certainty of cost** and to maximise return on investment
- Someone to **identify and solve** their cyber problems

And they need it **quickly**





# MANAGED SERVICES PORTFOLIO

CYBER SECURITY | **MANAGED SERVICES**

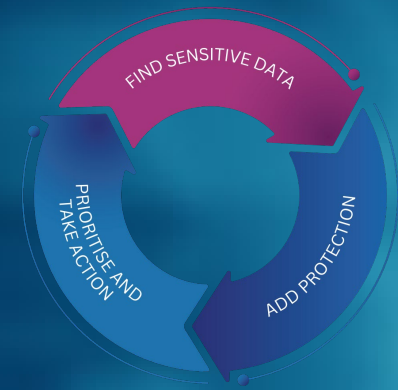
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# OUR PORTFOLIO AT A GLANCE



# INTRODUCING THE UNIFIED CYBER PLATFORM

- Built by NCC Group engineers delivering unique client benefits with our intellectual property
- Integrates the best third-party cyber security technologies into a single interface
- Allows enrichment and cross correlation for speed and quality
- Leverages the power of artificial intelligence and machine learning
- A platform enabling future growth and offering new capability aligned to market demand





# OUR PORTFOLIO AT A GLANCE



ATTACK SURFACE  
MANAGEMENT (ASM)



MANAGED DETECTION &  
RESPONSE (MXDR)



# OUR PORTFOLIO AT A GLANCE



ATTACK SURFACE  
MANAGEMENT (ASM)



MANAGED DETECTION &  
RESPONSE (MXDR)

INTERNAL & EXTERNAL  
THREAT INTELLIGENCE



ENRICHMENT SUGGESTION  
MACHINE LEARNING/AI

# SUPPORTED BY BEST IN BREED PARTNERS

## ATTACK SURFACE MANAGEMENT (ASM)

**CYCOGNITO**  
**RAPID7**

**tenable**

**TANIUM**



## MANAGED DETECTION & RESPONSE (MXDR)

**Microsoft**  
MISA

**CROWDSTRIKE**

**splunk**>  
Elite Partner

**DRAGOS**

**Carbon Black.** **CANARY TOKENS**



# WHAT WE DO TO SOLVE OUR CLIENTS' CHALLENGES

WE CAPTURE  
**HUNDREDS OF MILLIONS**  
OF SECURITY ALERTS

ALERTS ARE PICKED UP WITHIN  
**58 SECONDS**  
ON AVERAGE

**99.9%** OF ALERTS ARE HANDLED WITHOUT  
HUMAN INTERVENTION BY THE UNIFIED CYBER PLATFORM

**0.1%** GET ANALYSED BY OUR SECURITY ANALYSTS

ONLY **0.02%** NEED CLIENT INSPECTION

FOCUSING THE CLIENT ON **ALERTS THAT MATTER**

# OUR SERVICE CAN BE TAILORED TO ANY CLIENT



LOW

CLIENT CYBER MATURITY

HIGH

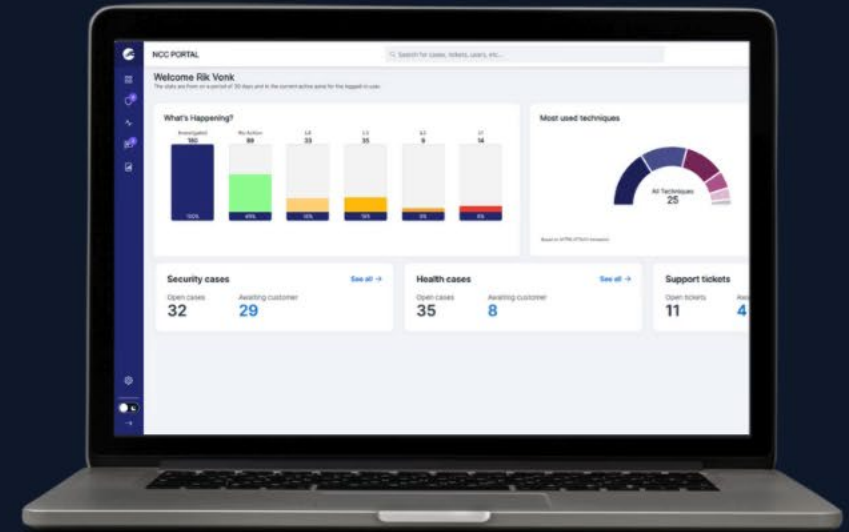
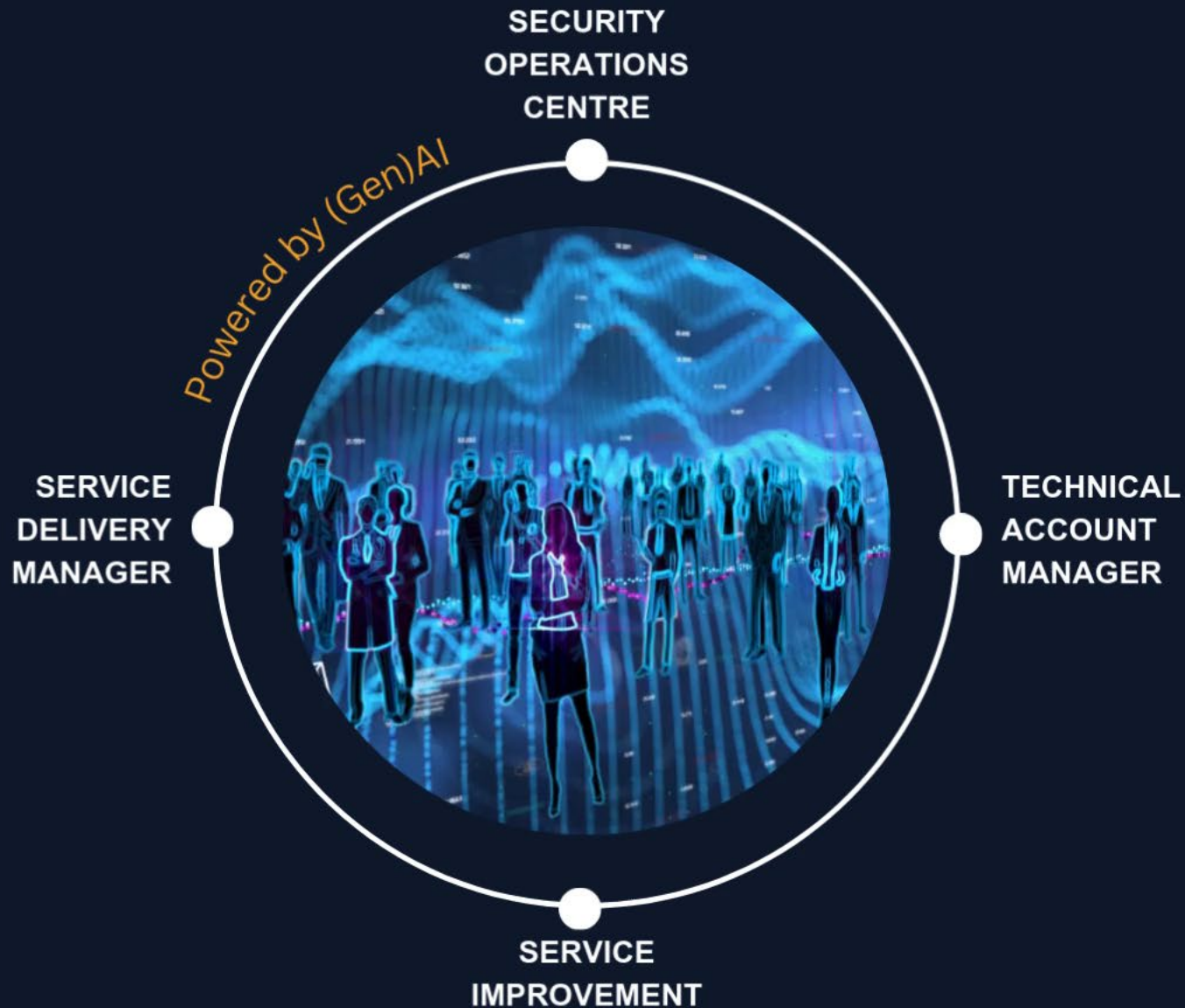
- Client only logs in after incident
- Delivery managers leverage portal for service reviews

**Central hub** for client interactions

**Single source of truth**, providing **full transparency** to the client

- Integration of Unified Cyber platform in client internal ticketing system
- Seamless collaboration between client and NCC experts

# PEOPLE-POWERED, TECH-ENABLED



# AS GLOBAL AS POSSIBLE, AS LOCAL AS NEEDED

## GLOBAL OPERATING MODEL

- Five operation centres around the world
- Client intimacy and regional delivery provided
- Single global technology stack enabling efficient innovation and support

## EFFECTIVE AND EFFICIENT

- Technology and detection capabilities built and developed globally
- Security Operations Centre operate globally as well as offering single region option
- Investment in Manila adding further capacity to our global operating model



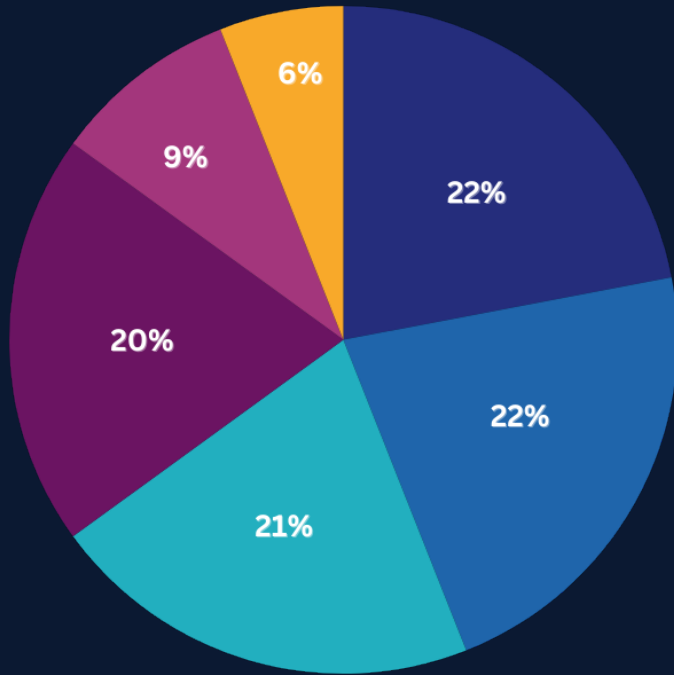
MARKET STRATEGY

CYBER SECURITY | **MANAGED SERVICES**

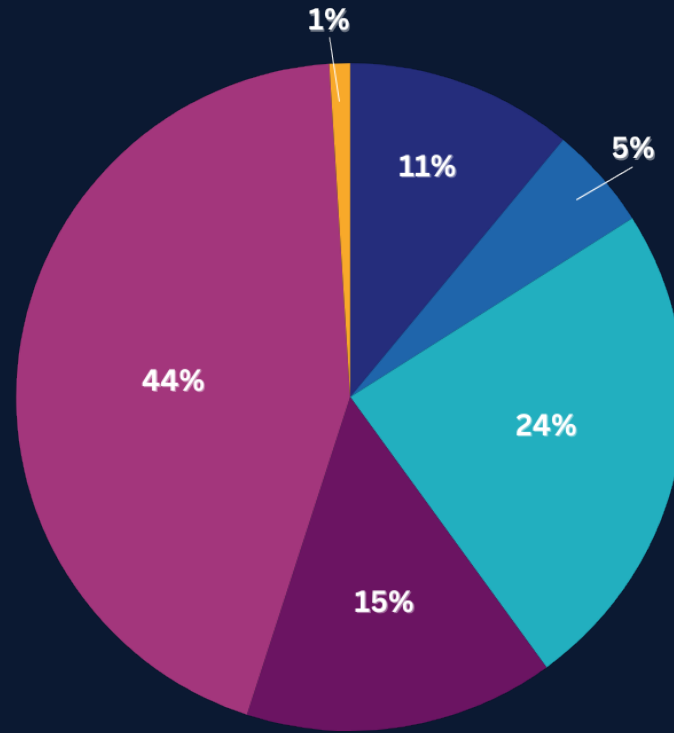
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# WE SEE ALIGNED DISTRIBUTION IN THE VERTICALS



IDC Market Data 2023  
(MSS REVENUE)



NCC GROUP FY24  
(MSS REVENUE)



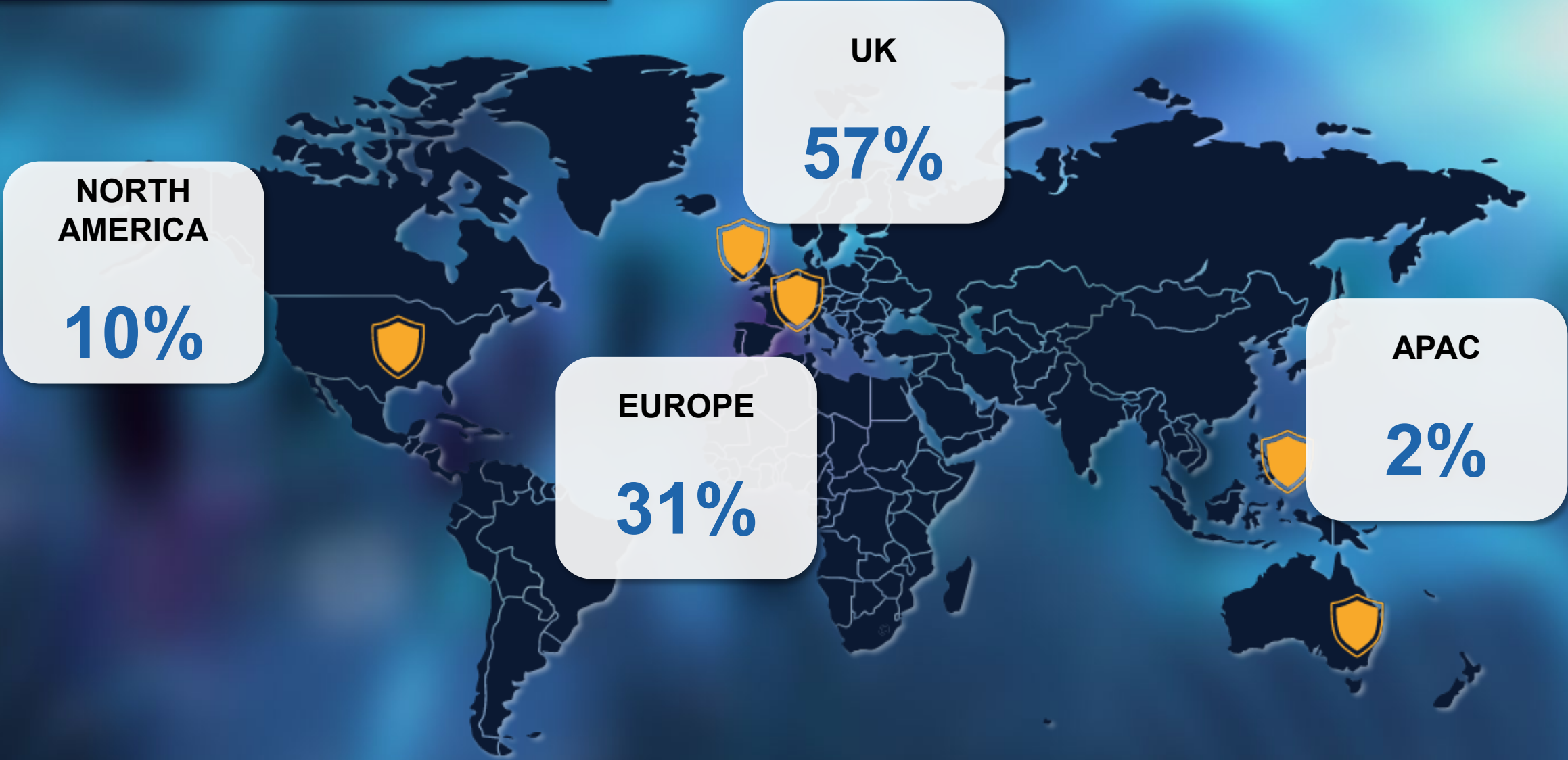
# WHERE IT BEGAN

A world map with a dark blue background and white outlines of continents. Two callout boxes are overlaid on the map. The first callout box is positioned over the United Kingdom and contains the text 'UK Accumuli acquisition 2015'. The second callout box is positioned over the Netherlands and contains the text 'Netherlands Fox-IT acquisition 2015'. There are also four yellow shield icons on the map: one in the United States, one in Germany, one in Japan, and one in Australia.

UK  
Accumuli  
acquisition  
**2015**

Netherlands  
Fox-IT  
acquisition  
**2015**

# GEOGRAPHIC COVERAGE



## CASE STUDY: GLORY GLOBAL SOLUTIONS

- Client requiring MXDR through standard procurement
- Early relationship investment
- Full deployment of NCC operating model
- Comprehensive Managed Service solution sold



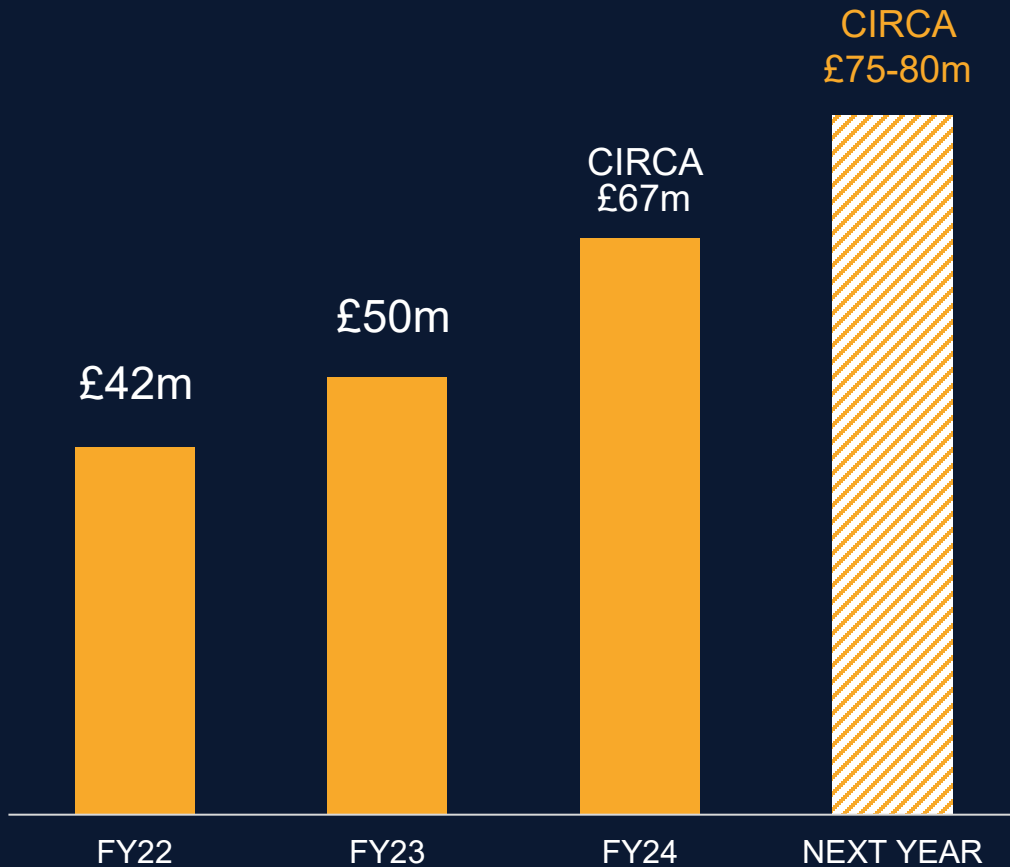


FUTURE GROWTH

CYBER SECURITY | **MANAGED SERVICES**

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# TRACK RECORD OF GROWTH



**88%**

FY24 ANNUAL RECURRING REVENUE

**20.3%**

CAGR FOUR-YEAR GROWTH RATE

**36%**

FY24 MS REVENUE GROWTH



# 01

Building from our base  
of amazing clients



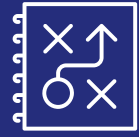
# 02

Growing the market  
through increasing  
awareness and  
education



# 03

Expanding our offers  
into new areas of  
market demand



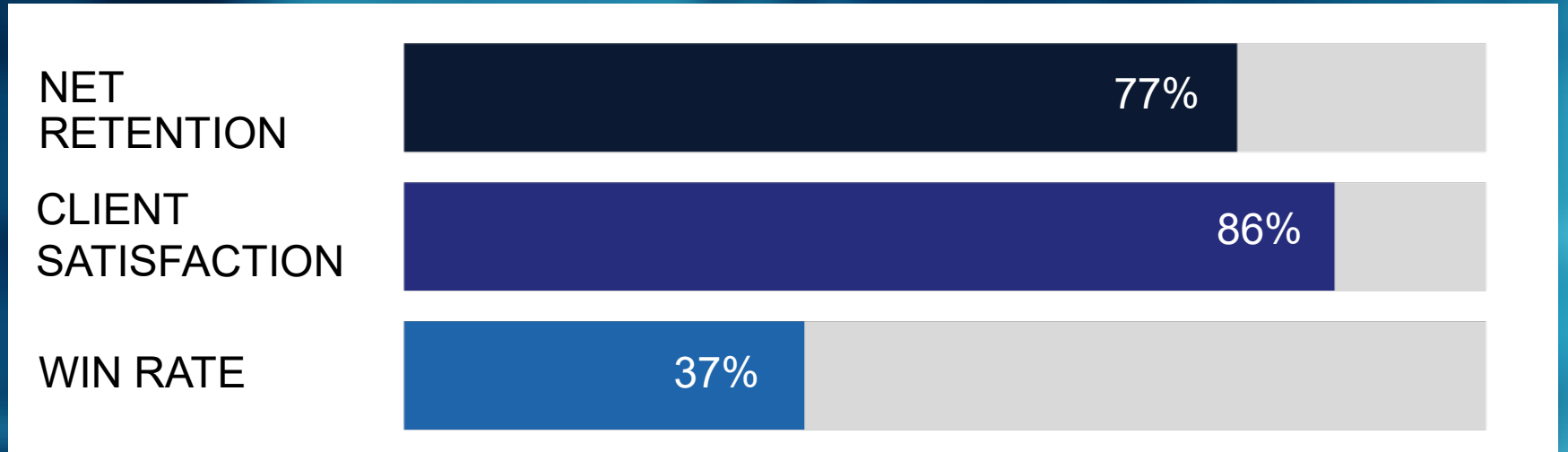
# 04

Inorganic execution  
aligned to NCC Group  
geographies, market  
position and  
solution strategy



# 01

Building from our base  
of amazing clients







**01**

Building from our base  
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**02**

Growing the market  
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**03**

**04**



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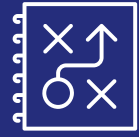
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Inorganic execution  
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## **YESTERDAY**

Our amazing people  
filled all the gaps

## **TODAY**

A foundation  
for the future

## **TOMORROW**

The technology has  
caught up with our people

We are

nccgroup

