

# Armis Virtual Fireside Chat

OCTOBER 23, 2025 | 11:00AM ET

Stephens is hosting a conference call for institutional investors with Armis. Armis is a leading provider of cyber exposure management and security solutions. In August 2025, Armis announced that it surpassed \$300 million in Annual Recurring Revenue (ARR) growing from \$200 million in less than twelve months.

This call will provide an overview and update on Armis's business and review market dynamics and trends in Continuous Threat Exposure Management (CTEM). We will also do a deep dive into various key CTEM segments (Cyber Asset Attack Surface Management, Cyber-Physical Security, Medical Device Security, and Unified Vulnerability Management) to better understand demand drivers and adoption trends. We will also review Armis' platform-based approach and key differentiators and competitive dynamics in each segment. We will also hear the company's perspectives on broad cyber trends including demand, platform consolidation, and AI.

## Participants from Armis

### Jonathan Carr, CFO

Jonathan Carr is the Chief Financial Officer at Armis, where he spearheads financial strategy and operations for a leading cybersecurity platform. With over 16 years of experience in both startup and Fortune 500 environments, he has a deep understanding of corporate finance, M&A, and strategic planning. His career spans notable roles at Atlassian and SurveyMonkey, where he successfully led teams in financial planning and analysis during significant growth phases. Jonathan is recognized for his strong leadership skills and his ability to drive high-impact results. He has earned multiple awards, including the Financial Results Award and Global Financial Compliance Award, showcasing his commitment to excellence in finance. Jonathan's passion for innovation and strategic growth is evident in his work, particularly in enabling organizations to navigate complex financial landscapes. He is also a founding member of Guilds by FirstMark, a community for C-level executives, reflecting his dedication to professional networking and development.

### Yoav Nathaniel

Yoav Nathaniel is a visionary entrepreneur and was the Founder & CEO of Silk Security, a leading platform for cyber risk prioritization and remediation. Armis acquired Silk in April 2024 for \$150 million. Prior to Silk, Yoav's career spanned transformative roles in both startups and enterprises. He began his journey at Avanan, a pioneering cloud security company acquired by Check Point for \$300M, where he gained firsthand experience in building products from the ground up and pivoting strategies to meet customer needs. His time at Goldman Sachs as the Head of Cloud Security Engineering provided a front-row seat to the challenges and opportunities within large-scale cybersecurity. Here, Yoav led innovative efforts to manage and automate the remediation of millions of security issues across diverse infrastructures, a challenge that inspired Silk Security's core mission.

**Conference call date and time subject to change. To join the call or to obtain more information, please contact your Stephens sales representative.**

## Topics of Discussion

- **Armis business overview:** Overview of Armis' business, key segments, and growth and profitability profile.
- **Cyber Threat Exposure Management (CTEM) market overview:** Defining the space and key segments and review market drivers, adoption trends, and key use cases.
- **CTEM segment deep dive:** Deep dive into key CTEM segments including Asset Management & Security, OT/IoT Security, Medical Device Security, and Unified Vulnerability Management.
- **Armis' differentiators and competitive dynamics:** Review Armis' platform-based approach and key differentiations and competitive dynamics across key segments.
- **Cyber trend perspectives:** Demand environment, platform consolidation, and impact of AI.

## Conference Call Host

**Todd Weller**  
Managing Director  
Cybersecurity & Infrastructure  
Software Technology Research  
501-377-6351  
[todd.weller@stephens.com](mailto:todd.weller@stephens.com)

Stephens

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[stephens.com](https://stephens.com)

**f in** 800-643-9691

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