



TCA GMM Fintech Panel

Derek Colla

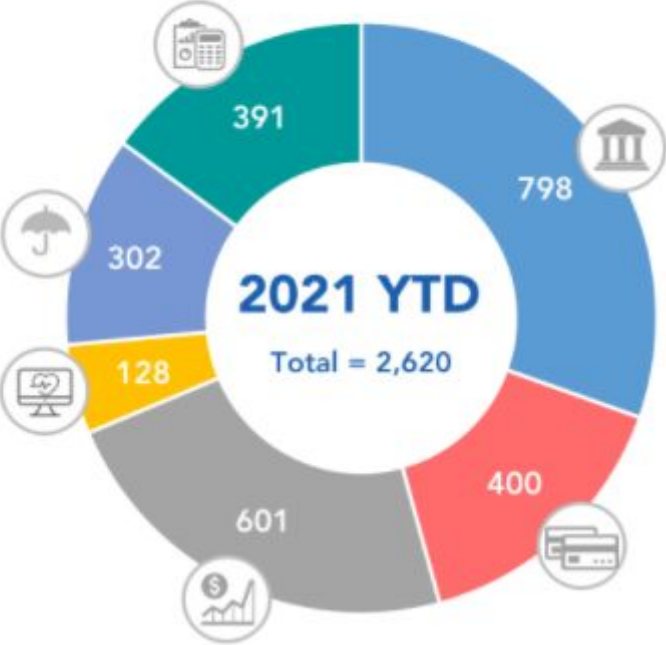
Dec. 9

attorney advertisement

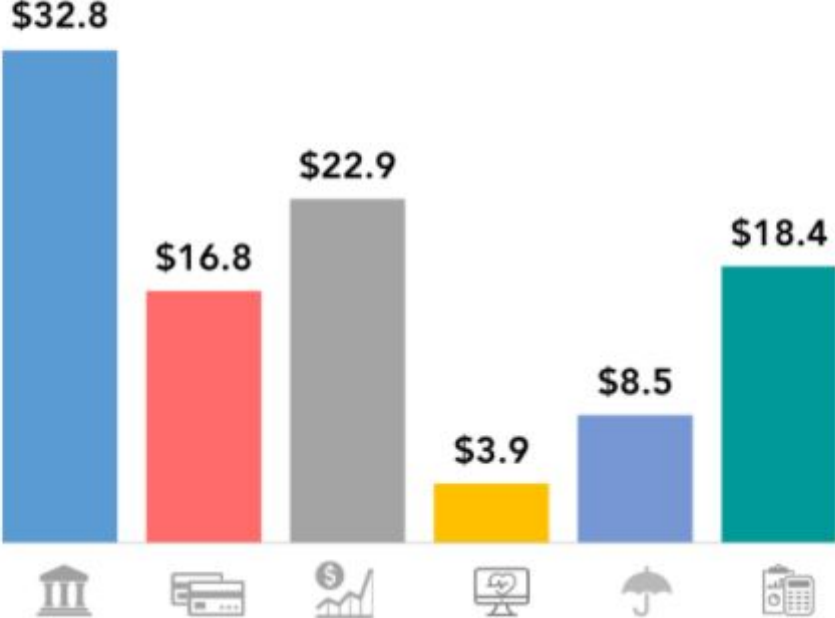
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2021 YTD Global FinTech Financing by Sector

Number of Financing Transactions



Financing Volume (\$ in billions)



KEY

- Banking / Lending Tech
- Payments
- Wealth & Capital Markets Tech
- Healthcare FinTech
- InsurTech
- Financial Management Solutions

Financing by
Sector

Source: FT Partners' Proprietary Transaction Database
Note: This report's Insurance sector data differs from FT Partners' standalone InsurTech Insights / Almanac data because the standalone report includes selected health insurance transaction data which is categorized in the healthcare sector in this report

Fintech Financing 2021

- The first three quarters of 2021 were the largest ever for private Fintech company capital raising with Q3 closely following Q2 at \$35.8 billion in total volume across 909 financing rounds
- At the end of Q3, 2021 YTD total volume surpassed \$100 billion reaching \$103.3 billion (2020 volume totaled \$45.7 billion)
- The massive increase in financing volume was buoyed by the significant number of \$100 million+ financing rounds
 - 296 in 2021 YTD compared to full-year totals of just over 100 in both 2020 and 2019.

Q3 2021 FINTECH INSIGHTS

FinTech Financing Statistics

FINANCIAL
TECHNOLOGY
PARTNERS

Global FinTech Financing Volume by Year

Financing activity for private FinTech companies skyrocketed in the first three quarters of 2021. Total volume reached over \$103 billion, an unprecedented figure that is larger than all historical full year totals and more than double the volume raised in all of 2020.



Source: FT Partners' Proprietary Transaction Database

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International Fintech Financing

Q3 2021 FINTECH INSIGHTS

Q1 – Q3 2021 FinTech Financing Activity By Region

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	Region / Continent	Number of Deals	% of Total # of Deals	Financing Volume (\$ in mm)	% of Total \$ Volume
	NORTH AMERICA	1,215	46%	\$57,129	55%
	EUROPE	671	26%	\$22,898	22%
	ASIA	430	16%	\$13,514	13%
	SOUTH AMERICA	95	4%	\$5,011	5%
	MIDDLE EAST	74	3%	\$1,345	1%
	AFRICA	73	3%	\$1,882	2%
	OCEANIA	62	2%	\$1,557	2%

Source: FT Partners' Proprietary Transaction Database
Note: \$ volumes and percentages by region only include transactions with announced amounts





























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Most Active Countries By Number of Financings in 2021 YTD

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Country	# of Financings	# of Financings % of Total	Dollar Volume (\$ in mm)	Dollar Volume % of Total	Largest Rounds Raised in 2021 YTD
 USA	1,105	42%	\$51,760	50%	Robinhood  stripe  insightsoftware
 UK	294	11%	10,133	10%	Revolut  SaltPay  checkout.com
 India	148	6%	4,761	5%	Pine Labs  BharatPe  zeta
 Singapore	88	3%	2,278	2%	ADVANCE INTELLIGENCE GROUP  CARRO  NIUM
 Canada	78	3%	3,371	3%	Wealthsimple  Truist  ena
 Germany	70	3%	3,242	3%	TRADE REPUBLIC  wefox  Solarisbank
 Brazil	66	3%	3,954	4%	NUbank  loft  EBANX
 France	61	2%	2,241	2%	Ledger  alan  Shift
 Australia	59	2%	1,519	1%	LATITUDE  Airwallex  employmenthero
 Indonesia	51	2%	908	1%	xendit  ojaib  bibit

Source: FT Partners' Proprietary Transaction Database
Note: \$ volumes by region only include transactions with announced amounts

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Accounting & Finance

brightflag #FloQast

tipalti Chargebee Khatabook STAMPLI autobooks AGICAP clear
pilot SETTLE Pennylane aavidxchange highradius zenoti

Capital Markets

carta genesis iCapital Trumid PrimaryBid CAPITOLIS

Personal Finance

M scalable trust wealthfront Betterment HMBradley
StashAway Albert Titan STASH ALTO Truebill

POS & Consumer Lending

Addi CRED deserve Mission Klarna sunbit Petal

Regulatory & Compliance

Comply Advantage FORTER Trulioo Signifyd Socure HPR
quantexa onfido IMMUTA

Real Estate & Mortgage

oft HomeLight Rhino roofstock Pacaso hometao
LeaseLock SPRUCE QUINTOANDAR snapdocs Valon
Juniper Square SIMPLENEXUS Qualia Flyhomes Divvy

Retail Investing & Secondary Markets

public.com YIELDSTREET Groww Rally TRADE REPUBLIC

Payroll & Benefits

remote snappy PayFit Human Interest dailypay. check
PAVE papayaglobal Guideline deel. truework gusto

Asset Management

ADDEPAR

VISE EquityBee DRIVEWEALTH AlphaSense

Payments Processing & Networks

Bolt cedar mollie
Airwallex ppro Orum checkout.com clip NIUM
paymongo Cashfree BharatPe GOCARDLESS
Flutterwave stripe ZEPZ OPay PayCargo
Enfuze RELAY Rapyd Razorpay deliverect
balance Paystand Pine Labs xfers ripple
SpotOn melio xendit EBANX recharge



Insurance

alan CyberCube Extend Ladder wefox
TRACTABLE at bay ARTURO
CAMBRIDGE MOBILE TELEMAIS ZEGO BESTOW socotra digit
PIE PIE INSURANCE VOUCH COWBELL CYBER ETHOS
NEXT Thimble Coalition luko CORVUS
EMBROKER BOUGHTBYMANY Policygenius marley

Business Lending & Finance

spendesk ramp CLEARCO Konfio pipe
Tradeshift PEO BlueVine Capchase Rho
C2FO MERCURY Brex airbase tide
PRODUCEPAY Fundbox

Financial Services & Automation

glia Oculous h[s] HYPERSCIENCE Notarize unqork Fairmarkit

Core Banking & Infrastructure

ALLOY AMOUNT Finxact unit Solarisbank MX
TRUELAYER zeta MAMBU Modulr NYMBUS
FINIX Reserve Trust cross river TREASURY PRIME narmi
MANTL Thunes. Railsbank Lithic HASH belvo.
codat PLAID

Credit Score & Analytics

Borrowell freo credit sesame NOVA CREDIT

Digital Banking

chime Current Varo lili GREENLIGHT LUNAR step nu
monzo qonto Revolut Starling Bank GREENWOOD vala

Mobile Wallets & Remittances

Chipper FONDEADORA PAYSSEND FAZZFINANCIAL toss

Cryptocurrency

CERTIK Bitcoin Suisse ANCHORAGE DIGITAL copper.co FTX SYNTHETIX
MESSARI BLOCKDAEMON Chainalysis Blockchain.com
Dapper BlockFi TAXbit bitpanda Bitwise Lukka
PAXOS FALCONX Fireblocks alchemy MobileCoin
Bitso celo Finoa AMBER Ledger CoinDCX wyre

General Lending & Marketplaces

CAPITAL FLOAT upgrade credits WeLab

Note: Companies are private as of 9/14/21.
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Fintech Verticals