

- FinTech Financing activity in July leveled out after June's record breaking \$17 billion in financing volume, but still stayed above the median monthly volume for the year (\$3.5 billion). July had the highest number of \$25 million+ financings so far this year (32 transactions) with 10 of these financings occurring in the Banking / Lending Tech sector.
- M&A activity was fairly steady this month, dropping below the median monthly volume of \$9.1 billion, but staying above the median monthly number of transactions (67). The two largest transactions (acquisitions of [Charles River Development](#) and Eze Software) were both in the Capital Markets / WealthTech sector.
- FT Partners' recent deals include [MarketInvoice's strategic financing & partnership with Barclays](#), [ING's €21 million investment in TransferMate](#), [Equidade's \\$50 million Series B financing](#), [PPRO's \\$50 million financing led by PayPal](#), [Moneybox's £14 million Series B financing](#), [Next Insurance's \\$83 million Series B financing](#), and [GPS' £44 million financing led by Dunedin](#).
- FT Partners is about to publish its new, in-depth research report: *Brazil's Emerging FinTech Ecosystem* – [Sign up here](#) to receive the report as soon as it is available.

\$4.4 billion

FINANCING VOLUME*

132

of FINANCING TRANSACTIONS

\$6.8 billion

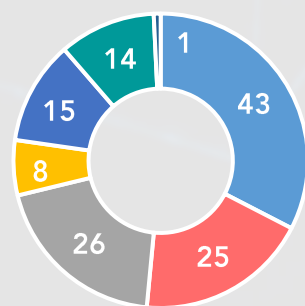
M&A VOLUME*

71

of M&A TRANSACTIONS

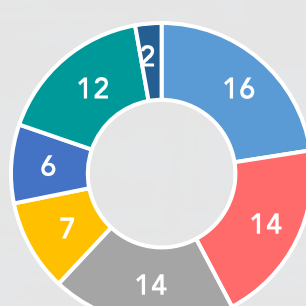
Activity by FinTech Sector – # of Deals

Financing



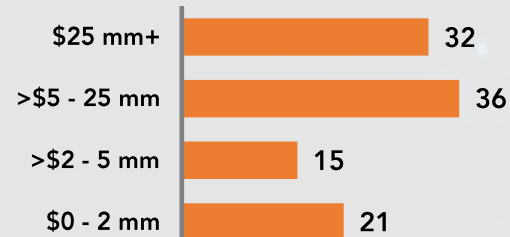
Total = 132

M&A



Total = 71

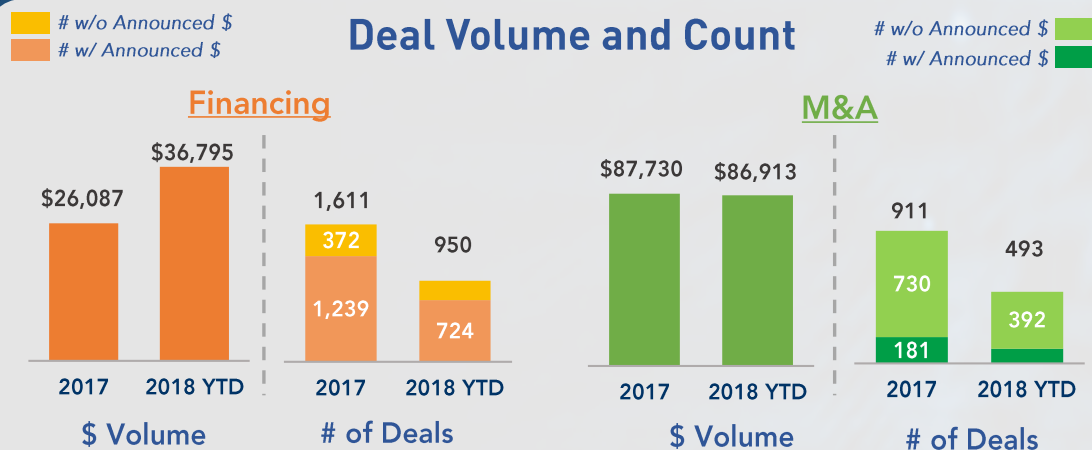
Financing Deals by Size*



M&A Deals by Size*



Deal Volume and Count



July 2017 Stats

\$1.5 billion

FINANCING
VOLUME*

151

of FINANCING
TRANSACTIONS

\$16.2 billion

M&A VOLUME*

87














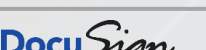






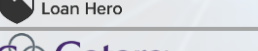


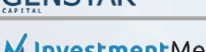



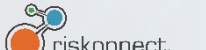



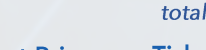
of M&A
TRANSACTIONS

Selected Transactions

Financing

Research Profile	Company	Amount (\$ in mm)
VIEW	 京东金融 JD Finance	\$1,960
VIEW	 GUSTO	140
	 mobile	124
	 付融宝 FuRongBao	121
	 雪球 Snowball Finance	120
VIEW	 toast	115
VIEW	 flywire	100
VIEW	 metromile	90
VIEW	 NEXT INSURANCE	83
VIEW	 Airwallex	80
VIEW	 老虎证券 TIGERBROKERS.COM	80
	 pafly	55
	 A-LIGN	55
	 FINATEXT	54
VIEW	 PPRO	50
VIEW	 EQUIDATE	50




M&A

Research Profile	Target	Acquirer	Amount (\$ in mm)
VIEW	 Charles River Development	 STATE STREET	\$2,600
	 EZE SOFTWARE	 SS&C	1,450
	 leumi card	 WARBURG PINCUS	684
VIEW	 LevelUp	 GRUBHUB	390
VIEW	 FINANZCHECK.DE	 SCOUT 24	332
	 BANKING CIRCLE	 IEQT	300
	 people doc	 Ultimate SOFTWARE	300
	 springcm	 DocuSign	220
	 ebase	 FNZ	178
	 FairConnect	 Palamon Capital Partners	117
	 Hubdoc	 XERO	70
	 Student Loan Hero	 lendingtree	60
	 Cetera FINANCIAL GROUP	 GENSTAR CAPITAL	na
	 Investor Force	 InvestmentMetrics	na
	 Resitrader	 optimalblue	na
	 MARSH ClearSight	 riskconnect	na

See more: [IPO Infographic](#)

Recent U.S. FinTech IPOs

IPOs are not included in deal totals or volumes

Research Profile	IPO Date	Company	Amount Raised (\$ in mm)	IPO Price	Current Price 8/6/18	Ticker
VIEW	06/28/18	 EVERQUOTE	\$84	\$18.00	\$15.05	Nasdaq: EVER
VIEW	06/21/18	 i3 Verticals	\$87	\$13.00	\$15.07	Nasdaq: IIIV
VIEW	06/15/18	 Avalara	\$180	\$24.00	\$40.75	NYSE: AVLRL