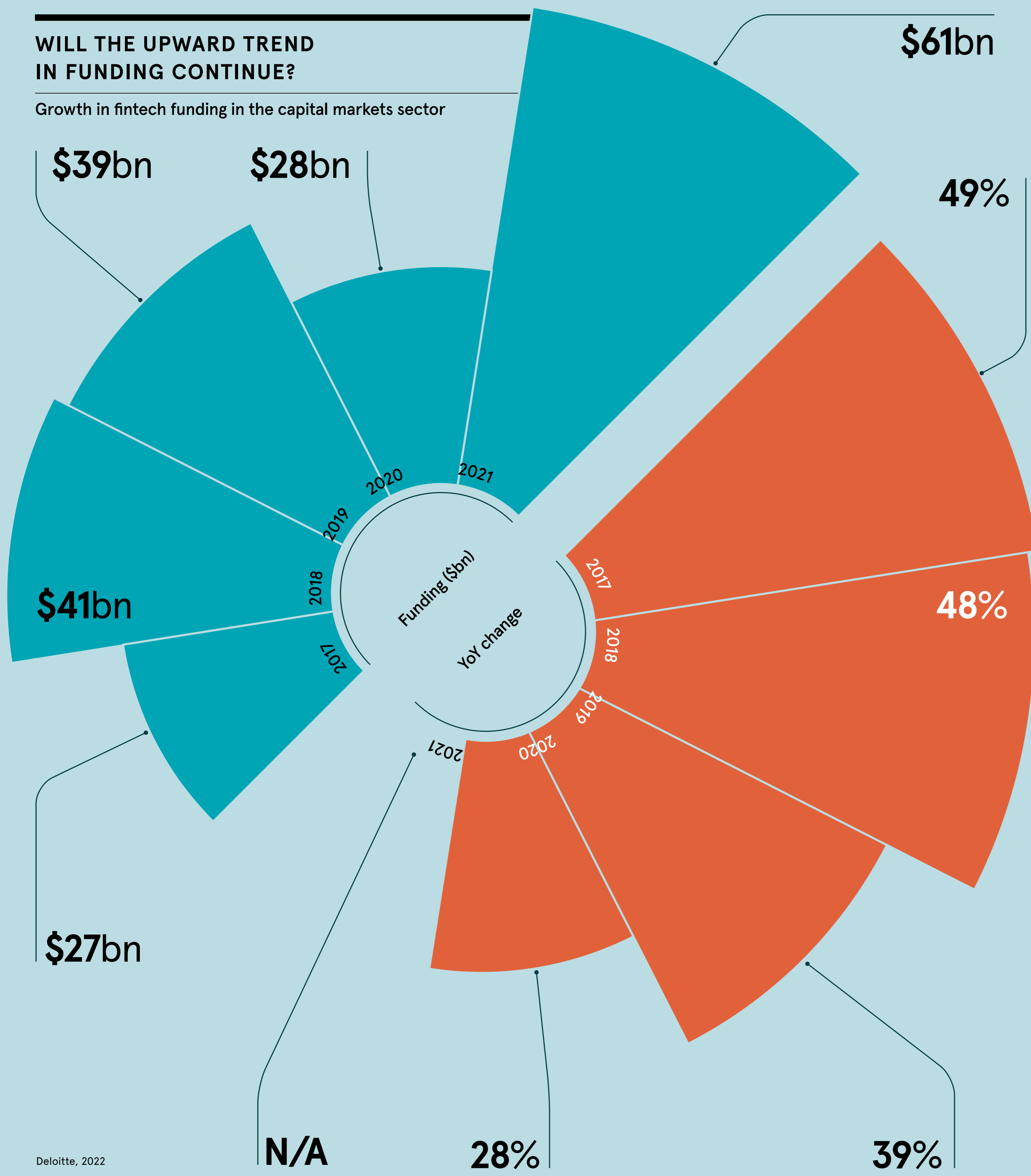


FINANCING FINTECH

WILL THE UPWARD TREND IN FUNDING CONTINUE?

Growth in fintech funding in the capital markets sector

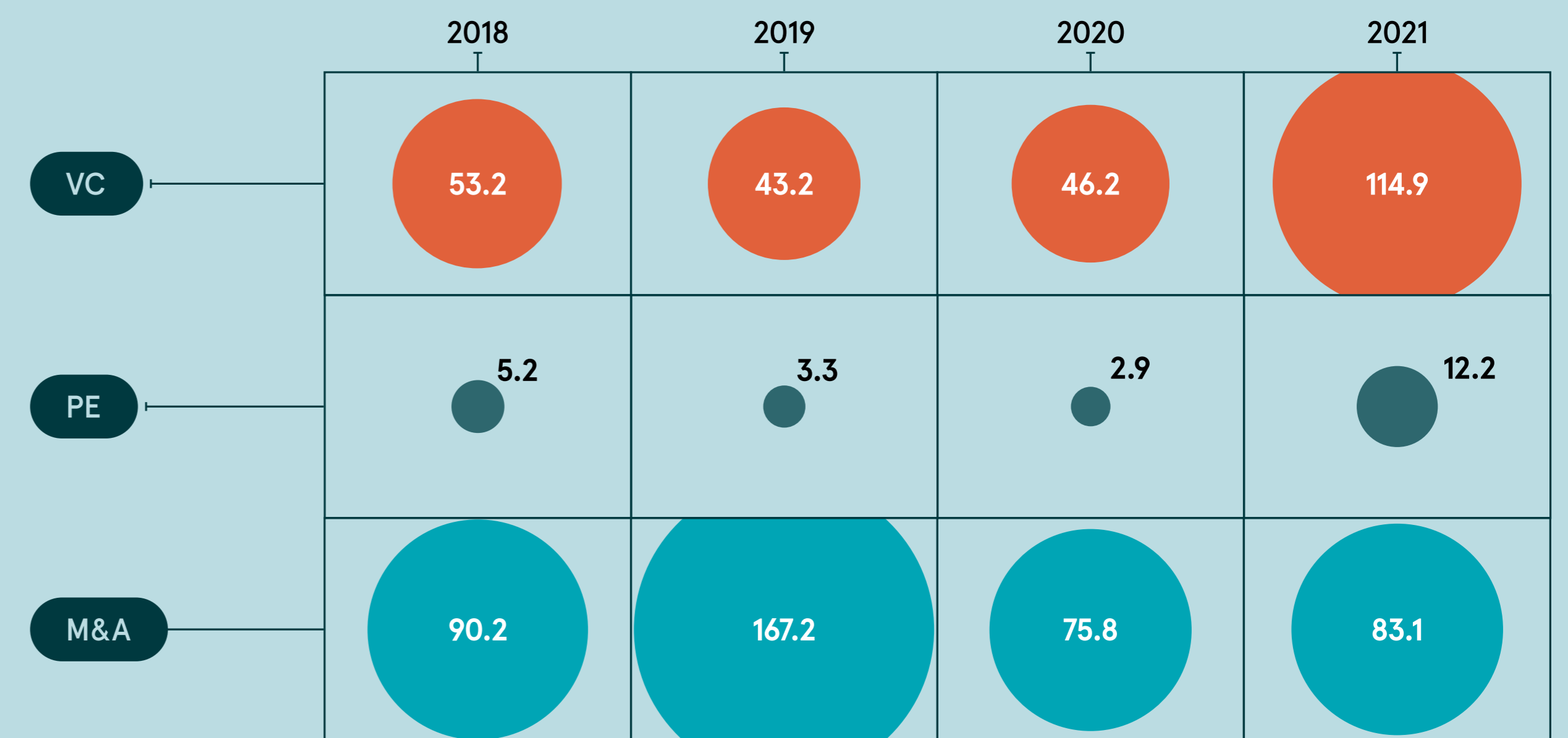


The sector has attracted increasing levels of investment and interest. The total financing volume in Q1 2022 reached \$37.4bn, the third largest level, behind Q2 and Q3 of 2021. Where is the money coming from and, perhaps more importantly, where is it going to?

THE MOST POPULAR PATHS TO INVESTING IN FINTECH

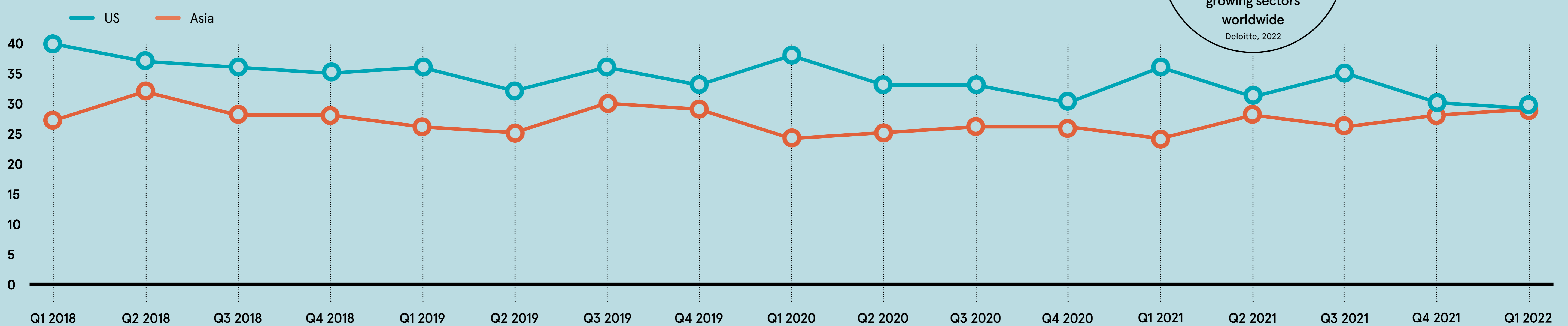
Global venture, private equity and M&A activity in fintech in terms of deal value (\$bn)

KPMG, 2022



GLOBAL COMPETITION FOR FINTECH FINANCING

Looking at the percentage of global early-stage deals shows the US and Asia are tying for the first time



25%
Average annual growth rate makes fintech among the fastest-growing sectors worldwide
Deloitte, 2022

WHERE IN THE WORLD IS FINTECH REALLY TAKING OFF?

Q1 2022 fintech financing activity by region (Number of deals)

Financial Technology Partners, 2022

