

DEALS & MARKET UPDATE

Capital Markets

February 2026



Tech-Enabled
Services



Software &
Analytics



Collections
Servicing



Infrastructure



Alternative
Investments



Banking &
Lending



Online
Brokers



Outsourced
Financial
Solutions



Financial Content
Providers



Wealth & Asset
Management



Investment
Banks



Specialty
Finance

Specialized investment bankers at the intersection of finance and technology



Overview of Evolve Capital Partners

About Evolve Capital Partners

- Evolve Capital Partners Inc. ("Evolve") is a growing investment bank focused exclusively on entrepreneurial businesses operating at the intersection of technology-enabled solutions and financial services
- Evolve’s primary coverage verticals include Capital Markets and Insurance
- As an independent investment bank, Evolve advises private and public companies on mergers and acquisitions, divestitures, capital raises, and financial restructurings
- Evolve dispenses bespoke, mission-critical advice within a creative and entrepreneurial environment, ensuring maximum value and successful outcomes
- Since its inception, Evolve has completed dozens of transactions, and professionals of the firm have advised on M&A and financing transactions worth more than \$10B
- Evolve was established in 2012 and is based in New York, NY

High-Touch Investment Banking

Our Clients

- Corporations
- PE Backed Companies
- Management Teams
- Independent Directors / Boards

Investment Banking Advisory

- M&A
- Strategic Capital Formation
- Strategic Alliances
- Financial Restructuring

Select Evolve Capital Markets Transactions

Insurance
FINANCIAL ADVISOR



has received a growth investment from



Insurance Agency Alliance

Capital Markets
FINANCIAL ADVISOR

Undisclosed ETF Data Provider

Has raised capital from

Undisclosed Prop Trading Firm

Data Provider

Capital Markets
SELL SIDE ADVISOR



Simpler Trading

Has completed a majority recapitalization with



ZMC

Trading Education

Capital Markets
FINANCIAL ADVISOR



Has raised capital from

Undisclosed Private Investors

Investment Analytics Platform



We Focus Exclusively on Capital Markets-Related Firms

Evolve consistently delivers expert strategic advisory across multifaceted Capital Markets sector transactions



Capabilities

M&A Advisory

Sales / Recaps

Acquisitions

Divestiture

Strategic Advisory

Data & Analytics

Specialized Software

Tech-Enabled Services

Advisory

Banking & Lending

Wealth & Asset Management



Capital Markets Industry M&A Update

M&A Market Update

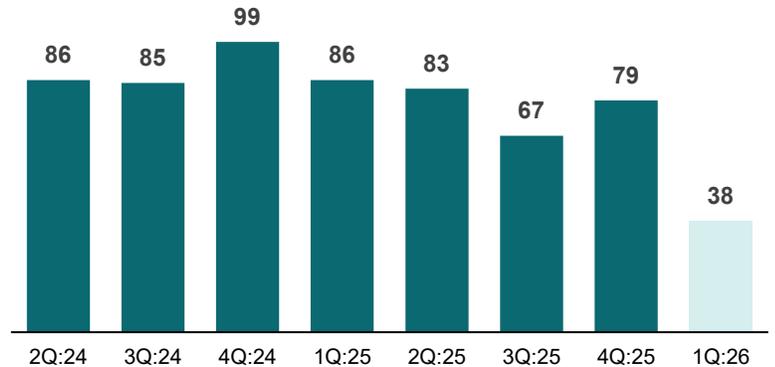
- Global M&A rose to ~\$4.8T of deal value in 2025 (second-highest on record), led by technology and megadeals, even as market participants remained selective on what actually clears. The US IPO market recorded 202 IPOs raising \$44.0B in 2025, but volatility and a 4Q pullback kept the window open mainly for higher-quality stories. The 2026 pipeline is skewing toward larger, high-profile issuers, which should keep retail engagement and listing momentum elevated when risk appetite cooperates.
- Private markets liquidity relied more on portfolio reshuffling than traditional exits, with secondaries volume reaching a record \$226B in 2025. Both LP portfolio sales and GP-led transactions expanded materially, reinforcing secondaries as a core liquidity outlet rather than a niche tool.
- Services:** Asset and wealth management platforms remain in consolidation mode as firms pursue scale, distribution, and expanded private markets access. RIA deal activity remained elevated, with reporting pointing to a record 315 transactions in 2025 driven in part by private equity-backed consolidators.
- Software & Technology:** Acquirers continue to prioritize infrastructure-oriented and control-oriented software, including cybersecurity and data governance, as AI adoption raises operational and compliance requirements.
- Banks & Lenders:** Banking and specialty lender M&A remains selective, with activity focused on scale-driven efficiencies and platform expansion. Private credit continues to extend its footprint across sponsor finance and liquidity solutions as it competes for high-quality credits.

Relevant News

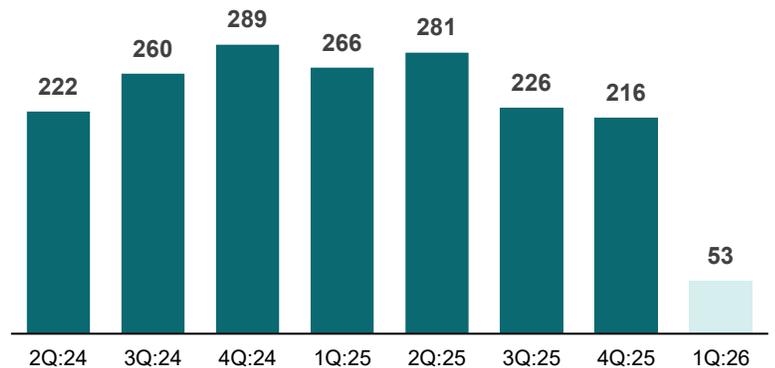
- 1/30:** The Federal Reserve's weekly H.2A release continued to show active processing of bank holding company formation, M&A notices, signaling a steady pipeline of regulated financial institution transactions entering 2026.
- 1/16:** Secondary deal volume for private assets rose 41% to a record \$226B in 2025, highlighting secondaries as a primary liquidity tool for private capital investors.

Announced M&A Transaction Count

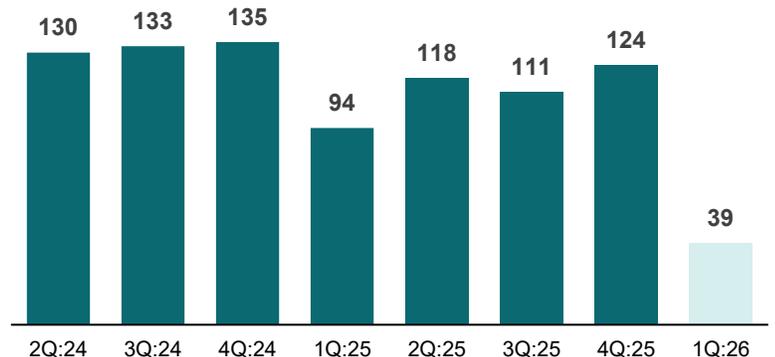
Services



Software & Technology



Banking & Lending



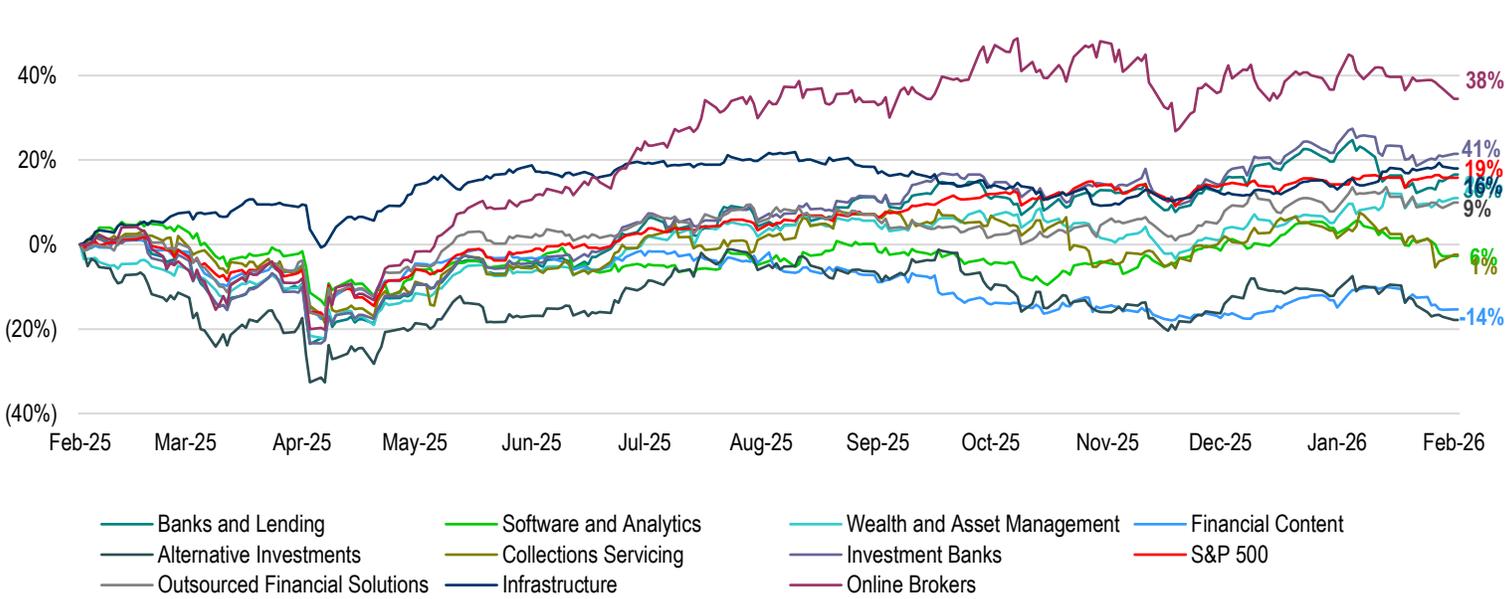
Data as of February 4, 2025
Source: Capital IQ



Market Summary and Key Multiples

Evolve's Capital Markets Industry Stock Market Performance

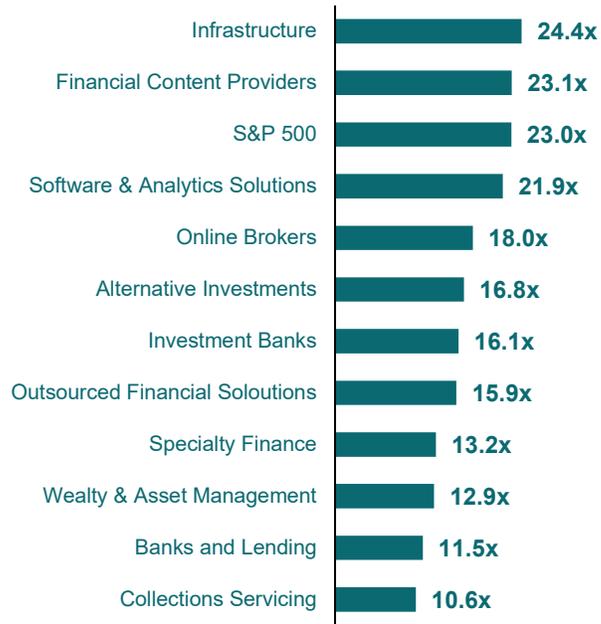
Last Twelve Months Capital Markets Sector Performance



Public Market Commentary

- U.S. equities held firm over the last twelve months, with the S&P 500 up ~19%. Capital Markets performance split by activity leverage: Investment Banks (+41%) and Online Brokers (+38%) led, while Banks and Lending (+16%) tracked closer to the broader market. Financial Content lagged (-15%) as investors repriced data and research platforms on rising AI-driven disruption risk.
- **Online Brokers:** Retail activity stayed elevated with 2025 printing another record year in options trading, including roughly 4.6B contracts across Cboe's options exchanges and ~18.4M average daily volume.
- **Investment Banks:** The market is pricing in a healthier fee environment, with 2026 advisory and origination revenue expected to grow roughly 9% even as trading normalizes from 2025 levels.
- **Banks and Lending:** The banking backdrop remains stable into 2026 as lower policy rates support asset quality, while net interest margins face pressure that is partially offset by fee and commission income.

Capital Markets NTM P / E Multiples



Data as of February 2, 2026
Source: Capital IQ

Recent Notable Capital Markets Transactions



January 22: Capital One to acquire Brex (~\$5.15B)

- **Capital One** is a U.S. bank and card issuer with scaled consumer and commercial payments capabilities.
- **Brex** is a corporate card and spend management platform with software led controls, expense workflows, and cash management products aimed at venture backed and mid-market customers.
- **Strategic Rationale:** The deal accelerates Capital One's push deeper into corporate payments and expense infrastructure, pairing Brex's modern workflow layer with Capital One's balance sheet, underwriting, and distribution to broaden share of wallet across commercial spend.



January 21: Deutsche Börse to acquire Allfunds for ~€5.3B (~\$6.2B)

- **Deutsche Börse** operates market infrastructure across trading, clearing, custody, and data, with a strategy centered on recurring, workflow embedded revenues.
- **Allfunds** is a funds distribution and wealth platform connecting asset managers, banks, and advisors via a single connectivity and data layer.
- **Strategic Rationale:** The acquisition expands Deutsche Börse's reach into wealth and funds workflows, adds a scaled connectivity and distribution network with recurring platform economics, and creates a clearer cross-sell path across data, post-trade services, and distribution infrastructure.



January 15: Raymond James to acquire Clark Capital Management

- **Raymond James** is a diversified wealth and capital markets firm with a large advisor base and a growing asset management platform.
- **Clark Capital** is an investment manager known for building and distributing portfolio management solutions used by advisors and intermediaries.
- **Strategic Rationale:** The deal strengthens Raymond James' advisor-facing investment solutions shelf, reinforces model and outsourced implementation capabilities that improve advisor productivity, and supports a more integrated wealth platform offering across portfolio construction, distribution, and practice workflows.



January 13: U.S. Bancorp to acquire BTIG (up to ~\$1.0B)

- **U.S. Bancorp** is a top U.S. bank expanding capital markets capabilities to deepen corporate and institutional relationships beyond traditional lending.
- **BTIG** is an institutional platform spanning investment banking, sales and trading, research, and prime brokerage with embedded client connectivity.
- **Strategic Rationale:** The deal adds a scaled capital markets distribution engine with differentiated coverage and trading capabilities, increases fee-based revenue mix, and broadens cross-sell into sponsor and corporate clients through a more complete markets and financing toolkit.



Recent Notable Capital Markets Transactions



December 29: SoftBank to acquire DigitalBridge (~\$4.0B)

- **SoftBank** is a global investment and operating group best known for large-scale tech and infrastructure investing through SoftBank Group and Vision Funds.
- **DigitalBridge** is a public alternative asset manager focused on digital infrastructure, investing in and operating data centers, towers, fiber, and edge networks for institutional clients.
- **Strategic Rationale:** SoftBank buys an operating platform with recurring management fees plus infrastructure sourcing capabilities, strengthening its ability to finance and scale AI-ready data center and connectivity capacity while keeping DigitalBridge as an independent unit post-close.



December 21: Clearwater Analytics to be acquired (~\$8.4B)

- **Permira and Warburg Pincus (Investor Group)** are global sponsors backing scaled vertical software and fintech platforms with recurring revenue and workflow stickiness.
- **Clearwater Analytics** is an institutional investment accounting, data, and reporting platform used by insurers, asset managers, and large allocators across public and private assets.
- **Strategic Rationale:** The deal supports acceleration of product expansion across alternatives and analytics-heavy workflows, enables faster platform consolidation and integration investment away from quarterly pressures, and reinforces Clearwater as a core operating system for institutional investment data and reporting.



December 17: Trading Technologies acquires OpenGamma

- **Trading Technologies (TT)** is a global trading platform provider with front-office execution and connectivity across futures, options, and multi-asset workflows.
- **OpenGamma** is a derivatives margin and capital analytics platform used by buy-side and sell-side participants to optimize collateral and margin outcomes.
- **Strategic Rationale:** The acquisition adds a high-value analytics layer adjacent to execution, improving TT's ability to unify trading and post-trade decisioning, deepen enterprise adoption via capital efficiency outcomes, and increase switching costs through integrated workflow and risk infrastructure.

Public Company Comparables - Capital Markets Sub-Sectors (1/3)

(All figures in millions of USD, except per share data. Data as of February 2, 2026)

Tech-Enabled Services		Market Data				Operating Performance						Valuation Multiples					
Company Name	Stock Price	% of 52-Wk. High	Market Value	Enterprise Value	LTM		Growth Rates:			LTM Margins:		EV / Revenue		EV / EBITDA			
					Revenue	EBITDA	CY 2025	CY 2026	LT	Gross	EBITDA	LTM	CY 2025	CY 2026	LTM	CY 2025	CY 2026
Accenture	\$266.52	66.9%	\$163,988	\$163,590	\$70,726	\$12,458	7%	6%	8%	32%	18%	2.3x	2.3x	2.2x	13.1x	12.1x	11.5x
Infosys	\$17.89	84.7%	\$72,381	\$72,359	\$218	\$48	n/m	40%	7%	29%	22%	NMF	4.9x	3.5x	NMF	16.0x	14.7x
Wipro	\$2.66	74.9%	\$27,858	\$23,754	\$9,980	\$1,851	3%	6%	3%	30%	19%	2.4x	2.4x	2.5x	12.8x	12.0x	11.2x
Capgemini SE	\$158.52	72.0%	\$26,716	\$31,420	\$26,045	\$3,368	1%	6%	8%	27%	13%	1.2x	1.2x	1.1x	9.3x	7.8x	7.2x
Booz Allen Hamilton Holding	\$87.51	65.2%	\$10,553	\$13,808	\$11,409	\$1,263	(1%)	1%	8%	22%	11%	1.2x	1.2x	1.2x	10.9x	11.2x	11.1x
Genpact Limited	\$44.04	77.6%	\$7,592	\$8,276	\$5,009	\$842	6%	7%	8%	36%	17%	1.7x	1.6x	1.5x	9.8x	8.7x	7.9x
Korn Ferry	\$70.07	89.3%	\$3,657	\$3,430	\$2,811	\$408	3%	4%	(0%)	25%	15%	1.2x	1.2x	1.2x	8.4x	7.1x	6.7x
CorVel Corporation	\$71.13	55.3%	\$3,645	\$3,463	\$934	\$166	NA	NA	NA	24%	18%	3.7x	NA	NA	20.9x	NA	NA
Veradigm	\$4.50	75.0%	\$765	\$538	\$588	\$52	(1%)	1%	(38%)	52%	9%	0.9x	0.9x	0.9x	10.4x	6.9x	6.2x
Conduent	\$1.50	30.5%	\$229	\$1,005	\$3,072	\$8	(9%)	4%	NMF	18%	0%	0.3x	0.3x	0.3x	NMF	6.3x	4.9x
MEAN							1%	8%	0%	30%	14%	1.7x	1.8x	1.6x	12.0x	9.8x	9.1x
MEDIAN							2%	6%	8%	28%	16%	1.2x	1.2x	1.2x	10.7x	8.7x	7.9x

Software & Analytics Solutions		Market Data				Operating Performance						Valuation Multiples					
Exchanges	Stock Price	% of 52-Wk. High	Market Value	Enterprise Value	LTM		Growth Rates:			LTM Margins:		EV / Revenue		EV / EBITDA			
					Revenue	EBITDA	CY 2025	CY 2026	LT	Gross	EBITDA	LTM	CY 2025	CY 2026	LTM	CY 2025	CY 2026
SS&C Technologies	\$81.70	89.7%	\$19,936	\$26,407	\$6,148	\$1,981	6%	6%	3%	49%	32%	4.3x	4.2x	4.0x	13.3x	10.7x	9.9x
Cleanwater Analytics	\$24.11	75.3%	\$6,859	\$7,798	\$640	\$77	62%	29%	42%	69%	12%	12.2x	10.7x	8.2x	NMF	31.5x	23.6x
Temenos	\$88.71	79.5%	\$6,120	\$6,821	\$1,095	\$280	3%	5%	1%	74%	26%	6.2x	6.3x	6.0x	24.4x	16.4x	15.3x
Intapp	\$34.07	43.8%	\$2,791	\$2,542	\$524	(\$20)	16%	13%	NMF	74%	(4%)	4.8x	4.7x	4.2x	NMF	24.6x	20.3x
MeridianLink	\$21.03	60.0%	\$2,412	\$2,606	\$586	\$54	10%	8%	NMF	60%	9%	4.4x	4.4x	4.1x	48.5x	19.7x	15.8x
IntegraFin Holdings	\$4.82	88.8%	\$1,597	\$1,248	\$214	\$138	9%	11%	5%	105%	64%	5.8x	5.7x	5.1x	9.0x	13.1x	10.8x
Iress Limited	\$5.68	78.6%	\$1,050	\$1,155	\$414	\$47	(9%)	(4%)	(12%)	32%	11%	2.8x	3.0x	3.1x	24.4x	12.6x	11.6x
MEAN							14%	10%	8%	66%	22%	5.8x	5.6x	5.0x	23.9x	18.4x	15.3x
MEDIAN							9%	8%	3%	69%	12%	4.8x	4.7x	4.2x	24.4x	16.4x	15.3x

Infrastructure		Market Data				Operating Performance						Valuation Multiples					
Exchanges	Stock Price	% of 52-Wk. High	Market Value	Enterprise Value	LTM		Growth Rates:			LTM Margins:		EV / Revenue		EV / EBITDA			
					Revenue	EBITDA	CY 2025	CY 2026	LT	Gross	EBITDA	LTM	CY 2025	CY 2026	LTM	CY 2025	CY 2026
CME Group	\$290.22	99.5%	\$104,651	\$105,851	\$6,385	\$4,494	7%	5%	14%	NA	70%	16.6x	16.2x	15.5x	23.6x	22.9x	21.7x
Intercontinental Exchange	\$172.48	91.1%	\$98,344	\$117,068	\$9,750	\$6,071	7%	6%	8%	NA	62%	12.0x	11.8x	11.2x	19.3x	17.9x	16.8x
Hong Kong Exchanges and Clearing	\$54.31	91.0%	\$68,649	\$29,577	\$3,582	\$2,675	29%	2%	8%	96%	75%	8.3x	8.1x	7.9x	11.1x	10.4x	10.3x
Nasdaq	\$97.47	95.8%	\$55,655	\$64,494	\$8,218	\$3,113	11%	(31%)	12%	64%	38%	7.8x	7.8x	11.3x	20.7x	21.1x	19.2x
Deutsche Börse	\$252.01	72.5%	\$46,186	\$54,026	\$9,619	\$3,773	(14%)	5%	16%	82%	44%	6.3x	7.6x	7.3x	14.3x	13.0x	12.3x
Cboe Global Markets	\$264.38	94.6%	\$27,686	\$27,764	\$4,618	\$1,497	(41%)	5%	14%	49%	32%	6.0x	11.5x	10.9x	18.5x	16.8x	16.0x
Singapore Exchange Limited	\$13.89	98.2%	\$14,133	\$10,077	\$602	\$0	8%	6%	10%	95%	56%	13.1x	12.8x	12.1x	23.5x	20.9x	19.5x
Japan Exchange Group	\$10.52	86.8%	\$10,813	\$10,259	\$1,172	\$767	12%	8%	NA	55%	65%	6.8x	8.9x	8.2x	13.4x	13.8x	13.2x
TMX Group Limited	\$37.22	87.8%	\$10,354	\$11,674	\$1,208	\$663	16%	7%	6%	92%	55%	9.7x	9.4x	8.8x	17.6x	17.0x	15.7x
ASX Limited	\$39.70	77.2%	\$7,713	\$6,372	\$778	\$460	7%	6%	0%	93%	59%	8.2x	7.9x	7.5x	13.9x	13.0x	12.6x
MEAN							4%	2%	10%	78%	56%	9.7x	10.2x	10.1x	17.6x	16.7x	15.7x
MEDIAN							8%	6%	10%	87%	58%	8.5x	9.2x	9.8x	18.1x	16.9x	15.9x

Collections Servicing		Market Data				Operating Performance						Valuation Multiples					
Exchanges	Stock Price	% of 52-Wk. High	Market Value	Enterprise Value	LTM		Growth Rates:			LTM Margins:		EV / Revenue		EV / EBITDA			
					Revenue	EBITDA	CY 2025	CY 2026	LT	Gross	EBITDA	LTM	CY 2025	CY 2026	LTM	CY 2025	CY 2026
Performant Financial Corporation	\$27.78	79.4%	\$5,533	\$7,355	\$1,652	NA	15%	(10%)	(11%)	NA	NA	4.5x	4.5x	5.0x	NA	NA	9.8x
Nelnet	\$134.43	94.1%	\$4,830	\$12,439	\$1,705	NA	11%	6%	(6%)	86%	NA	7.3x	8.3x	7.8x	NA	NA	NA
Encore Capital Group	\$55.61	96.2%	\$1,240	\$5,021	\$1,561	\$469	30%	2%	(10%)	NA	30%	3.2x	2.9x	2.9x	10.7x	8.0x	8.2x
NaviEnt Corporation	\$10.10	62.9%	\$970	\$46,039	\$330	NA	(61%)	81%	NMF	(28%)	NA	NMF	NMF	NMF	NA	NA	NA
PRA Group	\$12.81	53.4%	\$500	\$4,091	\$1,162	\$361	4%	5%	NA	NA	31%	3.5x	3.5x	3.4x	11.3x	11.3x	11.2x
MEAN							(0%)	17%	(9%)	29%	31%	4.6x	4.8x	4.7x	11.0x	9.6x	9.7x
MEDIAN							11%	5%	(10%)	29%	31%	4.0x	4.0x	4.2x	11.0x	9.6x	9.8x

Financial Content Providers		Market Data				Operating Performance						Valuation Multiples					
Exchanges	Stock Price	% of 52-Wk. High	Market Value	Enterprise Value	LTM		Growth Rates:			LTM Margins:		EV / Revenue		EV / EBITDA			
					Revenue	EBITDA	CY 2025	CY 2026	LT	Gross	EBITDA	LTM	CY 2025	CY 2026	LTM	CY 2025	CY 2026
S&P Global	\$527.20	91.0%	\$159,636	\$174,511	\$15,012	\$7,549	8%	8%	13%	70%	50%	11.6x	11.4x	10.6x	23.1x	22.3x	20.6x
Moody's	\$518.85	94.9%	\$92,559	\$97,912	\$7,501	\$3,579	9%	8%	3%	74%	48%	13.1x	12.7x	11.8x	27.4x	25.0x	22.8x
RELX	\$35.29	61.5%	\$63,948	\$73,965	\$13,016	\$4,223	2%	7%	9%	65%	32%	5.7x	5.6x	5.3x	17.5x	14.0x	13.0x
Thomson Reuters	\$109.88	50.2%	\$49,077	\$50,788	\$7,376	\$2,081	3%	8%	16%	39%	28%	6.9x	6.8x	6.3x	24.4x	17.4x	15.7x
MSCI	\$622.33	100.2%	\$45,803	\$61,602	\$3,134	\$1,906	10%	10%	12%	82%	61%	16.5x	16.5x	14.9x	27.1x	27.1x	24.1x
Gartner	\$204.09	34.9%	\$14,710	\$16,130	\$6,460	\$1,314	4%	3%	5%	68%	20%	2.5x	2.5x	2.4x	12.3x	10.1x	10.0x
FactSet Research	\$246.83	51.6%	\$9,157	\$10,425	\$2,361	\$922	5%	5%	9%	52%	39%	4.4x	4.4x	4.2x	11.3x	11.2x	11.1x
Morningstar	\$199.87	59.7%	\$8,220	\$8,749	\$2,395	\$568	7%	8%	19%	61%	24%	3.7x	3.6x	3.3x	15.4x	12.3x	11.1x
CRISIL	\$52.98	78.6%	\$3,874	\$3,787	\$362	\$105	10%	14%	16%	47%	28%	9.9x	9.6x	8.4x	36.0x	32.9x	28.4x
Value Line	\$37.44	84.8%	\$352	\$273	\$35	\$7	NA	NA	NA	82%	19%	7.9x	NA	NA	41.3x	NA	NA
Forrester Research	\$8.24	52.8%	\$157	\$99	\$404	\$24	(8%)	(1%)	(13%)	58%	6%	0.2x	0.2x	0.3x	4.1x	2.6x	2.4x
MEAN							5%	7%	9%	64%	32%	7.5x	7.3x	6.7x	21.8x	17.5x	15.9x
MEDIAN							6%	8%	11%	65%	28%	6.9x	6.2x	5.8x	23.1x	15.7x	14.4x

Public Company Comparables - Capital Markets Sub-Sectors (2/3)

(All figures in millions of USD, except per share data. Data as of February 2, 2026)

Alternative Investments	Market Data				Operating Performance							Valuation Multiples						
	Stock Price	% of 52-Wk. High	Market Value	Total Assets	LTM		Growth Rates:			LTM Net Income %	MV / Rev.			P / E		Price Book	ROE %	
					Revenue	Net Income	CY 2025	CY 2026	Earnings LT		LTM	CY 2025	CY 2026	LTM	CY 2025			CY 2026
Blackstone	\$141.94	74.7%	\$111,161	\$47,709	\$14,213	\$3,019	12%	11%	4%	21%	7.8x	7.8x	7.0x	36.8x	15.6x	13.7x	NMF	36%
KKR & Co	\$114.66	67.3%	\$102,203	\$398,481	\$22,246	\$2,272	(71%)	36%	3%	10%	4.6x	13.1x	9.7x	45.0x	22.9x	17.0x	3.8x	9%
Apollo Global Management	\$132.79	75.9%	\$77,076	\$449,543	\$27,217	\$4,064	(83%)	19%	25%	15%	2.8x	17.4x	14.6x	19.0x	15.7x	13.6x	3.5x	21%
3i Group	\$45.50	74.1%	\$44,889	\$40,471	\$9,038	\$8,569	31%	(2%)	15%	95%	5.0x	5.2x	5.3x	5.2x	5.3x	5.5x	1.2x	25%
EQT Corporation	\$54.99	88.4%	\$34,318	\$41,195	\$7,709	\$1,781	66%	11%	56%	23%	4.5x	4.1x	3.7x	19.3x	19.0x	12.7x	1.5x	8%
Ares Management Corporation	\$147.20	73.4%	\$32,434	\$27,032	\$5,356	\$512	13%	24%	27%	10%	6.1x	7.4x	5.9x	63.4x	28.1x	20.6x	NMF	20%
The Carlyle Group	\$59.66	85.4%	\$21,502	\$27,056	\$3,208	\$662	(19%)	24%	(5%)	21%	6.7x	5.6x	4.5x	32.5x	14.9x	12.7x	3.8x	12%
TPG	\$58.32	82.9%	\$8,928	\$13,020	\$4,255	\$62	(42%)	22%	14%	1%	2.1x	4.4x	3.6x	NMF	9.7x	7.2x	7.8x	7%
MEAN							(12%)	18%	17%	24%	4.9x	8.1x	6.8x	31.6x	16.4x	12.9x	3.6x	17%
MEDIAN							(3%)	21%	15%	18%	4.8x	6.5x	5.6x	32.5x	15.6x	13.1x	3.7x	16%

Banks and Lending	Market Data				Operating Performance							Valuation Multiples						
	Stock Price	% of 52-Wk. High	Market Value	Total Assets	LTM		Growth Rates:			LTM Net Income %	MV / Rev.			P / E		Price Book	ROE %	
					Revenue	Net Income	CY 2025	CY 2026	Earnings LT		LTM	CY 2025	CY 2026	LTM	CY 2025			CY 2026
JPMorgan Chase & Co.	\$308.25	91.4%	\$831,090	\$4,424,900	\$168,235	\$55,681	1%	15%	5%	33%	4.9x	4.9x	4.3x	14.9x	15.0x	14.5x	2.4x	17%
Bank of America Corporation	\$53.99	93.8%	\$389,365	\$3,410,394	\$107,422	\$29,055	12%	12%	(1%)	27%	3.6x	3.6x	3.2x	13.4x	13.4x	12.3x	1.4x	11%
Wells Fargo & Company	\$92.71	94.8%	\$286,701	\$2,148,631	\$80,041	\$20,285	3%	11%	1%	25%	3.6x	3.6x	3.2x	14.1x	14.1x	13.4x	1.7x	12%
Citigroup	\$116.82	94.1%	\$204,143	\$2,657,202	\$75,716	\$13,024	6%	20%	(9%)	17%	2.7x	2.7x	2.3x	15.7x	14.5x	11.5x	1.1x	7%
Capital One Financial	\$224.41	86.4%	\$140,279	\$669,009	\$32,779	\$1,816	20%	94%	(3%)	6%	4.3x	4.3x	2.2x	77.2x	13.2x	11.3x	1.3x	2%
U.S. Bancorp	\$57.26	101.0%	\$88,999	\$692,345	\$26,354	\$7,194	5%	15%	(1%)	27%	3.4x	3.4x	2.9x	12.4x	12.4x	11.5x	1.5x	13%
The PNC Financial Services	\$227.51	99.9%	\$88,823	\$573,572	\$22,320	\$6,619	7%	13%	2%	30%	4.0x	4.0x	3.5x	13.4x	13.5x	12.1x	1.5x	12%
The Bank of New York Mellon	\$121.52	96.5%	\$83,634	\$472,300	\$20,112	\$5,306	8%	5%	11%	26%	4.2x	4.2x	4.0x	15.8x	15.6x	14.6x	2.1x	14%
Truist Financial Corporation	\$52.70	102.0%	\$66,526	\$547,538	\$18,425	\$4,974	6%	16%	(9%)	27%	3.6x	3.6x	3.1x	13.4x	12.8x	12.1x	1.1x	8%
State Street Corporation	\$132.67	96.8%	\$37,025	\$366,047	\$13,885	\$2,717	7%	6%	3%	20%	2.7x	2.7x	2.5x	13.6x	12.4x	11.4x	1.5x	12%
Fifth Third Bancorp	\$51.29	96.2%	\$33,910	\$214,376	\$8,355	\$2,376	5%	55%	(2%)	28%	4.1x	4.1x	2.6x	14.3x	13.9x	9.7x	1.7x	13%
OneMain Holdings	\$65.39	90.9%	\$7,698	\$26,985	\$2,892	\$705	98%	7%	(14%)	24%	2.7x	1.6x	1.5x	10.9x	9.8x	8.3x	2.3x	21%
Enova International	\$172.00	102.0%	\$6,468	\$1,491	\$308	\$208	20%	144%	5%	21%	2.9x	2.9x	1.2x	13.8x	12.3x	10.5x	3.2x	24%
The Bancorp	\$62.53	76.6%	\$2,648	\$9,352	\$526	\$228	NMF	(31%)	20%	43%	5.0x	5.0x	7.3x	11.6x	11.6x	10.6x	7.7x	31%
LendingClub Corporation	\$17.20	79.4%	\$1,984	\$11,568	\$1,335	\$136	15%	(20%)	46%	10%	1.5x	1.5x	1.9x	14.6x	14.6x	9.7x	1.3x	10%
Encore Capital Group	\$55.61	96.2%	\$1,240	\$5,258	\$1,561	(\$45)	30%	2%	(10%)	(3%)	0.8x	0.7x	0.7x	NMF	5.2x	6.0x	2.1x	(5%)
MEAN							20%	23%	3%	23%	3.4x	3.3x	2.9x	17.9x	12.8x	11.2x	2.1x	13%
MEDIAN							8%	12%	(0%)	26%	3.6x	3.6x	2.8x	13.8x	13.3x	11.5x	1.5x	12%

Wealth & Asset Management	Market Data				Operating Performance							Valuation Multiples						
	Stock Price	% of 52-Wk. High	Market Value	Total Assets	LTM		Growth Rates:			LTM Net Income %	MV / Rev.			P / E		Price Book	ROE %	
					Revenue	Net Income	CY 2025	CY 2026	Earnings LT		LTM	CY 2025	CY 2026	LTM	CY 2025			CY 2026
BlackRock	\$1,115.19	91.4%	\$173,023	-	\$24,216	\$5,553	19%	16%	6%	23%	7.1x	7.1x	6.2x	31.2x	22.4x	19.3x	3.1x	11%
The Bank of New York Mellon	\$121.52	96.5%	\$83,634	\$472,300	\$20,112	\$5,306	8%	5%	11%	26%	4.2x	4.2x	4.0x	15.8x	15.6x	14.6x	2.1x	14%
Ameriprise Financial	\$532.18	96.3%	\$48,588	\$190,086	\$18,513	\$3,626	1%	7%	9%	20%	2.6x	2.7x	2.5x	13.4x	12.8x	12.3x	7.7x	60%
State Street Corporation	\$132.67	96.8%	\$37,025	\$366,047	\$13,885	\$2,717	7%	6%	3%	20%	2.7x	2.7x	2.5x	13.6x	12.4x	11.4x	1.5x	12%
Northern Trust Corporation	\$151.35	96.0%	\$28,202	\$8,094	\$1,679	\$179	(2%)	6%	3%	21%	3.5x	3.5x	3.3x	16.8x	16.5x	15.3x	2.3x	14%
T. Rowe Price Group	\$105.63	89.3%	\$23,053	\$14,730	\$7,205	\$2,031	4%	5%	(8%)	28%	3.2x	3.1x	3.0x	11.4x	10.7x	10.2x	2.1x	19%
Amundi	\$91.30	100.0%	\$18,604	n.a.	\$7,996	\$1,883	(50%)	2%	0%	24%	2.3x	4.7x	4.6x	9.9x	11.9x	11.0x	1.3x	14%
Franklin Resources	\$27.06	100.6%	\$14,069	-	\$8,846	\$564	9%	16%	(10%)	6%	1.6x	1.5x	1.3x	25.0x	11.5x	10.4x	1.2x	5%
Invesco	\$27.16	91.7%	\$12,057	\$27,094	\$6,377	(\$726)	5%	(17%)	(11%)	(11%)	1.9x	1.9x	2.3x	NMF	13.1x	10.0x	1.0x	(6%)
Schroders	\$6.22	96.4%	\$9,754	\$30,366	\$4,199	\$489	(16%)	5%	(6%)	12%	2.3x	2.8x	2.7x	19.9x	13.0x	11.9x	1.7x	8%
MEAN							(1%)	5%	(0%)	17%	3.1x	3.4x	3.2x	17.4x	14.0x	12.6x	2.4x	16%
MEDIAN							5%	6%	2%	20%	2.6x	3.0x	2.8x	15.8x	12.9x	11.7x	1.9x	13%

Online Brokers	Market Data				Operating Performance							Valuation Multiples						
	Stock Price	% of 52-Wk. High	Market Value	Total Assets	LTM		Growth Rates:			LTM Net Income %	MV / Rev.			P / E		Price Book	ROE %	
					Revenue	Net Income	CY 2025	CY 2026	Earnings LT		LTM	CY 2025	CY 2026	LTM	CY 2025			CY 2026
The Charles Schwab	\$104.39	98.7%	\$185,494	-	\$23,921	\$8,417	22%	11%	9%	35%	7.8x	7.8x	7.0x	22.0x	21.1x	18.2x	4.4x	21%
Robinhood Markets	\$91.12	59.2%	\$81,934	\$41,452	\$4,204	\$2,194	53%	22%	NMF	52%	19.5x	18.1x	14.8x	37.3x	38.8x	32.4x	9.6x	28%
Interactive Brokers Group	\$77.55	98.4%	\$34,536	\$203,240	\$6,205	\$984	19%	10%	32%	16%	5.6x	5.6x	5.1x	35.1x	35.5x	31.4x	6.4x	20%
Futu Holdings	\$162.93	80.5%	\$22,685	\$31,162	\$2,434	\$1,257	96%	11%	39%	52%	6.3x	8.0x	7.2x	18.0x	16.2x	14.6x	4.9x	30%
XP	\$19.96	95.2%	\$10,357	\$75,961	\$3,272	\$961	13%	13%	7%	29%	3.2x	3.0x	2.6x	10.8x	10.5x	9.7x	2.3x	22%
Swissquote Group Holding	\$569.97	77.1%	\$8,515	\$18,471	\$935	\$395	4%	6%	15%	42%	9.1x	9.3x	8.8x	21.6x	19.8x	19.4x	5.6x	28%
MarketAxess Holdings	\$166.93	71.7%	\$6,205	\$2,014	\$839	\$220	4%	8%	(0%)	26%	7.4x	7.3x	6.8x	28.3x	24.5x	21.1x	4.5x	16%
Plus500	\$57.99	99.7%	\$4,075	\$1,061	\$776	\$274	3%	(3%)	(3%)	35%	5.3x	5.2x	5.3x	14.9x	15.0x	15.2x	6.8x	42%
Virtu Financial	\$39.75	86.8%	\$3,375	\$20,151	\$2,845	\$468	28%	(26%)	1%	16%	1.2x	1.2x	1.6x	7.2x	3.7x	4.3x	1.7x	29%
AJ Bell	\$6.33	80.2%	\$2,534	\$433	\$144	\$144	16%	10%	24%	33%	5.9x	5.7x	5.2x	17.7x	17.7x	17.4x	8.6x	50%
Matsui Securities	\$5.82	97.4%	\$1,499	\$8,252	\$281	\$84	5%	7%	NA	30%	5.3x	6.1x	5.7x	17.8x	NA	NA	3.0x	17%
UP Fintech Holding Limited	\$8.42	62.1%	\$1,492	\$9,298	\$490	\$154	76%	6%	66%	31%	3.0x	2.6x	2.4x	9.7x	8.1x	7.9x	1.8x	23%
CMC Markets	\$4.42	96.4%	\$1,203	\$1,048	\$474	\$86	12%	7%	(6%)	18%	2.5x	2.3x	2.2x	14.0x	11.4x	10.4x	2.1x	15%
Monex Group	\$4.50	77.3%	\$1,131	\$4,880	\$474	(\$35)	10%	1%	NA	(7%)	2.4x	2.4x	2.3x	NMF	NA	NA	1.5x	(4%)
MEAN							25%	6%	17%	29%	6.2x	6.0x	5.5x	19.6x	18.5x	16.8x	4.5x	24%
MEDIAN							14%											

Public Company Comparables - Capital Markets Sub-Sectors (3/3)

(All figures in millions of USD, except per share data. Data as of February 2, 2026)

Outsourced Financial Solutions				Market Data				Operating Performance						Valuation Multiples				
Company Name	Stock Price	% of 52-Wk. High	Market Value	Total Assets	LTM		Growth Rates:			LTM Net Income %	MV / Rev.			P / E		Price Book	ROE %	
					Revenue	Net Income	CY 2025	CY 2026	LT		CY 2025	CY 2026	LTM	CY 2025	CY 2026			
State Street Corporation	\$132.67	96.8%	\$37,025	\$366,047	\$13,885	\$2,717	7%	6%	3%	20%	2.7x	2.7x	2.5x	13.6x	12.4x	11.4x	1.5x	12%
LPL Financial Holdings	\$377.06	93.4%	\$30,187	\$18,493	\$16,586	\$863	37%	27%	29%	5%	1.8x	1.8x	1.4x	35.0x	19.0x	15.7x	5.6x	21%
Broadridge Financial Solutions	\$196.84	72.4%	\$22,977	\$8,303	\$7,056	\$925	6%	5%	10%	13%	3.3x	3.2x	3.1x	24.8x	21.6x	19.9x	8.7x	38%
Computershare Limited	\$22.60	75.1%	\$13,074	\$5,335	\$3,119	\$605	3%	0%	26%	19%	4.2x	4.2x	4.2x	21.6x	16.2x	15.9x	6.1x	28%
SEI Investments Company	\$88.23	93.9%	\$10,784	\$3,260	\$2,297	\$715	8%	14%	7%	31%	4.7x	4.7x	4.1x	15.1x	15.1x	15.3x	4.4x	30%
Bravura Solutions Limited	\$1.37	56.0%	\$613	\$125	\$221	\$52	3%	(7%)	4%	23%	2.8x	3.0x	3.2x	11.9x	25.7x	19.2x	9.4x	65%
MEAN							11%	8%	13%	19%	3.2x	3.3x	3.1x	20.3x	18.4x	16.2x	6.0x	32%
MEDIAN							7%	6%	9%	19%	3.0x	3.1x	3.2x	18.3x	17.6x	15.8x	5.9x	29%

Investment Banks				Market Data				Operating Performance						Valuation Multiples				
Company Name	Stock Price	% of 52-Wk. High	Market Value	Total Assets	LTM		Growth Rates:			LTM Net Income %	MV / Rev.			P / E		Price Book	ROE %	
					Revenue	Net Income	CY 2025	CY 2026	LT		CY 2025	CY 2026	LTM	CY 2025	CY 2026			
JPMorgan Chase & Co.	\$308.25	91.4%	\$831,090	\$4,424,900	\$168,235	\$55,681	1%	15%	5%	33%	4.9x	4.9x	4.3x	14.9x	15.0x	14.5x	2.4x	17%
The Goldman Sachs Group	\$945.73	96.0%	\$296,693	\$1,810,000	\$59,396	\$16,300	14%	8%	(2%)	27%	5.0x	5.0x	4.6x	18.2x	18.2x	16.5x	2.6x	15%
Morgan Stanley	\$184.49	95.7%	\$292,048	-	\$70,296	\$16,249	14%	9%	2%	23%	4.2x	4.2x	3.8x	18.0x	18.0x	16.3x	2.9x	17%
UBS Group	\$47.59	96.7%	\$150,813	\$1,632,251	\$48,193	\$7,338	(20%)	5%	0%	15%	3.1x	3.9x	3.7x	20.6x	21.1x	18.3x	1.7x	8%
Deutsche Bank	\$39.47	97.6%	\$75,086	\$1,693,896	\$35,868	\$7,283	8%	9%	21%	20%	2.1x	2.1x	1.9x	10.3x	10.0x	9.7x	0.8x	8%
Macquarie Group Limited	\$147.42	88.2%	\$53,911	\$337,082	\$12,385	\$2,526	6%	5%	(1%)	20%	4.4x	4.3x	4.1x	21.3x	19.1x	17.3x	2.2x	11%
Raymond James Financial	\$167.55	94.3%	\$33,043	-	\$14,216	\$2,090	10%	11%	10%	15%	2.3x	2.3x	2.1x	15.8x	14.7x	13.5x	2.7x	17%
Nomura Holdings	\$8.38	86.6%	\$24,600	\$398,243	\$13,138	\$2,316	4%	4%	NA	18%	1.9x	2.0x	2.0x	10.6x	NA	NA	1.0x	10%
Evercore	\$360.02	92.6%	\$13,925	\$4,422	\$3,543	\$528	24%	23%	(8%)	15%	3.9x	3.8x	3.1x	26.4x	23.8x	17.5x	7.7x	31%
Stifel Financial	\$124.12	92.1%	\$12,619	-	\$5,530	\$646	12%	13%	(3%)	12%	2.3x	2.3x	2.0x	19.5x	17.0x	11.8x	2.5x	13%
Houlihan Lokey	\$167.53	79.1%	\$11,674	\$3,937	\$2,648	\$448	16%	13%	4%	17%	4.4x	4.4x	3.9x	26.1x	22.6x	19.9x	5.1x	20%
Piper Sandler Companies	\$347.98	91.5%	\$6,156	\$2,220	\$1,717	\$236	15%	15%	(9%)	14%	3.6x	3.5x	3.0x	26.0x	22.1x	18.9x	4.5x	19%
Moelis & Company	\$71.93	86.8%	\$5,323	\$1,517	\$1,468	\$235	24%	18%	(13%)	16%	3.6x	3.6x	3.0x	22.7x	23.0x	17.9x	9.9x	52%
Lazard	\$54.26	93.4%	\$5,148	\$4,941	\$3,099	\$237	2%	15%	(18%)	8%	1.7x	1.7x	1.4x	21.7x	19.3x	12.3x	6.1x	31%
MEAN							9%	12%	(1%)	18%	3.4x	3.4x	3.1x	19.4x	18.7x	15.7x	3.7x	19%
MEDIAN							11%	12%	(1%)	16%	3.6x	3.7x	3.1x	20.0x	19.1x	16.8x	2.7x	17%

Specialty Finance				Market data				Operating performance						Valuation multiples				
Company name	stock price	% OF 52-Wk. High	market value	total assets	Ltm		Growth rates:			ltm net Income %	mv / rev.			P / E		price book	Roe %	
					revenue	Net income	CY 2025	CY 2026	Lt		CY 2025	CY 2026	Ltm	CY 2025	CY 2026			
Capital One Financial	\$224.41	86.4%	\$140,279	\$669,009	\$32,779	\$1,816	20%	94%	(3%)	6%	4.3x	4.3x	2.2x	77.2x	13.2x	11.3x	1.3x	2%
Affirm Holdings	\$61.84	61.8%	\$20,412	\$11,479	\$3,459	\$233	31%	25%	Nmf	7%	5.9x	5.6x	4.5x	Nmf	25.0x	17.5x	6.2x	8%
OneMain Holdings	\$65.39	90.9%	\$7,698	\$26,985	\$2,892	\$705	98%	7%	(14%)	24%	2.7x	1.6x	1.5x	10.9x	9.8x	8.3x	2.3x	21%
FirstCash Holdings	\$172.05	98.6%	\$7,593	\$5,182	\$3,486	\$310	7%	12%	24%	9%	2.2x	2.1x	1.9x	24.5x	19.8x	16.9x	3.5x	15%
SLM Corporation	\$27.78	79.4%	\$5,533	\$29,746	\$1,652	\$729	15%	(10%)	(11%)	44%	3.4x	3.4x	3.7x	7.6x	7.6x	10.2x	2.5x	35%
Credit Acceptance Corporation	\$509.43	91.0%	\$5,441	\$8,641	\$1,233	\$454	150%	2%	(14%)	37%	4.4x	2.3x	2.3x	12.0x	12.0x	11.6x	3.6x	28%
Upstart Holdings	\$40.24	41.7%	\$3,915	\$2,905	\$998	\$32	53%	23%	(4%)	3%	3.9x	3.8x	3.1x	Nmf	20.9x	14.1x	5.3x	5%
Provident Financial Services, Inc.	\$22.80	101.5%	\$2,978	\$24,981	\$867	\$291	43%	8%	15%	34%	3.4x	3.4x	3.2x	10.2x	10.2x	9.6x	1.1x	11%
The Bancorp	\$62.53	76.6%	\$2,648	\$9,352	\$526	\$228	6%	(31%)	20%	43%	5.0x	5.0x	7.3x	11.6x	11.6x	10.6x	7.7x	31%
Zip Co	\$1.89	55.2%	\$2,406	\$2,440	\$746	\$56	27%	23%	Nmf	7%	3.2x	3.2x	2.3x	43.3x	39.0x	22.2x	5.0x	14%
Lufax Holding	\$2.61	57.2%	\$2,266	\$29,720	\$4,717	(\$487)	3%	7%	(50%)	(10%)	0.5x	0.6x	0.6x	Nmf	14.1x	5.3x	0.2x	(4%)
Pathward Financial	\$92.23	101.3%	\$2,045	\$7,560	\$786	\$190	6%	6%	5%	24%	2.0x	2.6x	2.4x	10.7x	11.6x	10.8x	2.4x	23%
EZCORP	\$21.90	99.1%	\$1,334	\$1,951	\$1,274	\$110	10%	10%	56%	9%	1.0x	1.0x	0.9x	12.2x	11.8x	10.6x	1.3x	12%
FinVolution Group	\$5.15	46.5%	\$1,303	\$3,785	\$2,019	\$403	4%	(7%)	1%	20%	0.6x	0.7x	0.7x	3.2x	3.3x	4.1x	0.5x	18%
Atlanticus Holdings Corporation	\$53.03	67.2%	\$803	\$7,080	\$498	\$105	362%	55%	(11%)	21%	1.6x	0.4x	0.3x	7.6x	7.1x	4.9x	1.4x	20%
International Personal Finance	\$3.19	98.7%	\$701	\$1,673	\$959	\$99	5%	16%	7%	10%	0.7x	0.7x	0.6x	7.1x	9.4x	8.5x	1.0x	15%
Funding Circle Holdings	\$2.17	89.9%	\$686	\$554	\$237	\$11	Nmf	9%	(31%)	5%	2.9x	2.5x	2.3x	59.8x	33.3x	18.4x	2.5x	4%
ECN Capital	\$2.24	86.9%	\$630	\$976	\$200	\$4	Nmf	9%	6%	2%	3.1x	1.7x	1.6x	Nmf	8.7x	6.8x	7.3x	5%
World Acceptance Corporation	\$124.42	67.1%	\$596	\$1,142	\$573	\$43	1%	6%	(6%)	7%	1.0x	1.0x	1.0x	13.9x	12.2x	13.1x	1.7x	11%
Lexifintech Holdings	\$2.83	24.3%	\$476	\$3,321	\$1,982	\$263	(7%)	(2%)	(7%)	13%	0.2x	0.3x	0.3x	1.8x	1.7x	2.2x	0.3x	16%
Vanquis Banking Group	\$1.65	92.9%	\$421	\$4,705	\$379	(\$108)	69%	13%	(54%)	(28%)	1.1x	0.7x	0.6x	Nmf	46.8x	7.5x	0.7x	(16%)
Regional Management	\$39.25	85.3%	\$381	\$2,028	\$610	\$41	13%	10%	(16%)	7%	0.6x	0.6x	0.5x	9.2x	8.6x	6.2x	1.0x	11%
Oportun Financial Corporation	\$5.68	61.4%	\$250	\$3,186	\$713	\$31	25%	4%	(5%)	4%	0.4x	0.3x	0.3x	8.2x	3.9x	3.3x	0.7x	9%
Humm Group	\$0.51	94.2%	\$249	\$3,716	\$196	\$24	80%	41%	(4%)	12%	1.3x	0.8x	0.5x	10.5x	7.0x	6.7x	0.7x	6%
Consumer Portfolio Services	\$8.76	68.8%	\$193	\$3,810	\$197	\$19	135%	11%	(20%)	10%	1.0x	0.4x	0.4x	9.9x	9.7x	5.6x	0.6x	7%
Mean							51%	14%	(5%)	13%	2.3x	1.9x	1.8x	17.6x	14.3x	9.9x	2.4x	12%
Median							20%	9%	(5%)	9%	2.2x	1.6x	1.5x	10.6x	11.6x	9.6x	1.4x	11%



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KEY SENIOR PROFESSIONALS

Alexander Koles

Founder and Managing Director
akoles@evolve-capital.com

Mr. Koles has over two decades of financial advisory experience including advising middle-market and multinational firms on merger and acquisition strategies and execution, restructurings and capital raises. Prior to founding Evolve Capital Partners, he worked at a number of leading investment banks in leadership roles. He started his career at Merrill Lynch as an investment banker in the corporate finance group.

CONTACT

Evolve Capital Partners
336 West 37th Street, Suite 735
New York, NY 10018
T: (646) 688-2792
evolve-capital.com