

DEALS & MARKET UPDATE

Capital Markets

June 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

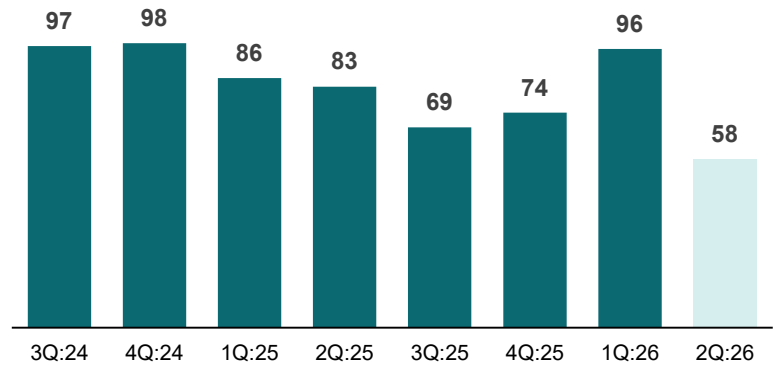
- Worldwide announced M&A reached ~\$2.23T in the first five months of 2026, a 45% increase year-over-year despite a 14% drop in deal count, driven primarily by 39 mega deals exceeding \$10B. Concurrently, U.S. IPO momentum accelerated with ~29 listings raising ~\$19B across April and May.
- Global Secondaries 2026 transaction volume is projected to reach a record ~\$250B, even after a measured ~\$40B Q1 (down ~11% YoY), as a muted exit environment pushes LPs and GPs toward the secondary market and demand broadens beyond buyouts into private credit.
- Services:** Deal activity remained value-driven as acquirers pursued larger, more selective platform combinations across wealth and asset management. Emphasis shifted toward alternative asset capabilities, private markets integration, and advisory-centric distribution, while PE continued underwriting scale-building at pace.
- Software & Technology:** M&A continued to favor fewer, significantly larger transactions as capital concentrated around AI compute, semiconductor innovation, and fintech infrastructure. Discretionary capital remained constrained, limiting volume while values surged, with acquirers prioritizing direct exposure to the accelerating AI buildout.
- Banks & Lenders:** Regional consolidation continued, driven by regulatory clarity and technology scale needs, though deal activity moderated from elevated expectations as macro uncertainty and rising yields gave some acquirers pause.

Relevant News

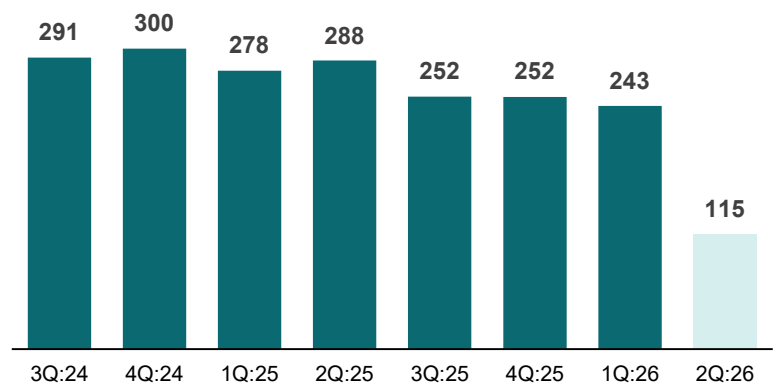
- 6/3:** SpaceX launched its IPO roadshow at \$135 per share, targeting ~\$75B in proceeds at a ~\$1.77T valuation; if completed, it would rank as the largest IPO on record, surpassing Saudi Aramco.
- 4/14:** The SEC eliminated the \$25,000 Pattern Day Trader minimum, significantly broadening retail market access and expanding the active trader base for online brokers.

Announced M&A Transaction Count

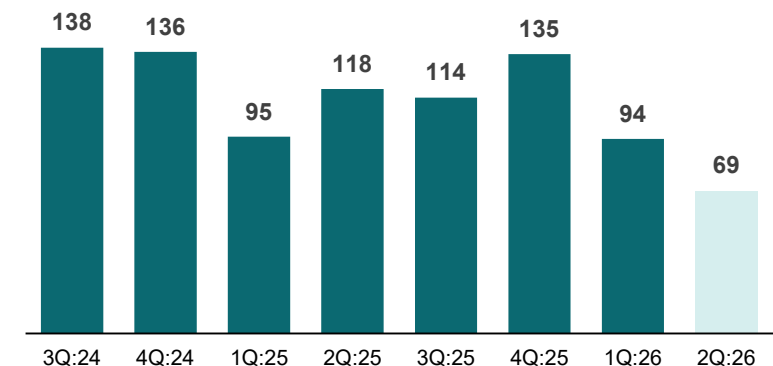
Services



Software & Technology



Banking & Lending



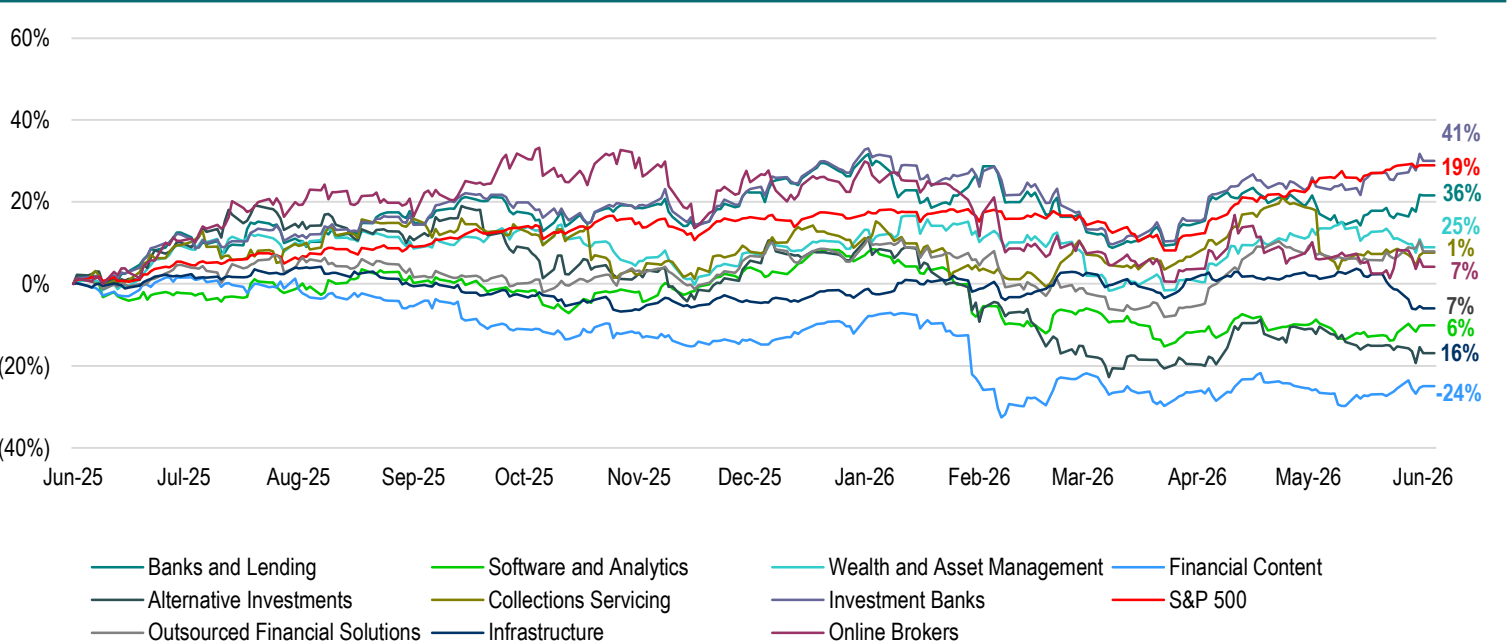
Data as of June 5, 2026
Source: Capital IQ



Market Summary and Key Multiples

Evolve's Capital Markets Industry Stock Market Performance

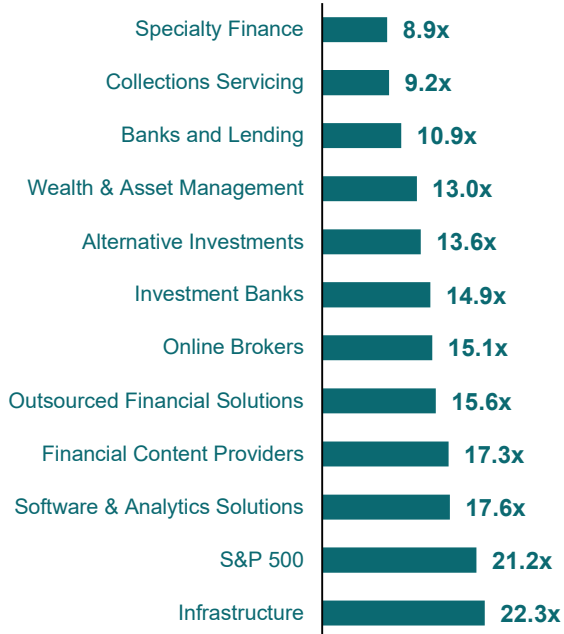
Last Twelve Months Capital Markets Sector Performance



Public Market Commentary

- Capital Markets subsector performance diverged sharply over the last twelve months. Investment Banks led at +30%, edging the S&P 500 (+26%) as AI-driven consolidation strengthened deal pipelines, while Banks & Lending (+22%) outperformed on resilient credit demand. The laggards clustered at the other end, with Financial Content down ~25% amid AI-driven research disintermediation, Alternative Investments off ~17%, and Software & Analytics down ~10%.
- **Online Brokers:** Trade at ~15.1x NTM earnings, one of the higher multiples in the group, as renewed retail engagement and record options activity sustained transaction volumes with equities at all-time highs.
- **Investment Banks:** Re-rated to ~14.9x NTM earnings as AI-driven consolidation and permissive regulation accelerated deal pipelines, with investors paying up for the advisory and underwriting recovery.
- **Banks and Lending:** Remained well-positioned as credit demand stayed resilient, though energy-driven inflation and yield pressure kept margins under scrutiny.

Capital Markets NTM P / E Multiples



Data as of June 5, 2026
Source: Capital IQ

Recent Notable Capital Markets Transactions



DIGITALBRIDGE



ARCLIGHT

May 27: DigitalBridge to acquire ArcLight

- **DigitalBridge** is a leading global alternative asset manager dedicated to digital infrastructure (NYSE: DBRG), with over 30 years investing across data centers, cell towers, fiber, and edge infrastructure.
- **ArcLight Capital Partners** is one of North America's leading specialist investors in power and electric infrastructure.
- **Strategic Rationale:** This acquisition creates a scaled investment platform at the convergence of power, AI, and digital infrastructure, pairing ArcLight's power expertise with DigitalBridge's digital infrastructure reach to meet surging AI-driven demand for compute, connectivity, and power.

May 22: SoFi Technologies acquires Peach Finance

- **SoFi Technologies** is a leading digital-first personal finance platform, offering members a broad suite of financial products and services including lending, banking, investing, and insurance solutions.
- **Peach Finance** provides a Software-as-a-Service (SaaS) platform that supports loan servicing, processing, and infrastructure for consumer lenders
- **Strategic Rationale:** SoFi's third acquisition of 2026, adding Peach Finance, a loan-servicing and lending-infrastructure SaaS platform, to its Technology Solutions segment alongside Galileo and Technisys; advances SoFi's pivot toward enterprise fintech infrastructure. Terms undisclosed.



Goldman
Sachs
Alternatives



FGI

May 12: Goldman Sachs Alternatives acquires FGI Worldwide

- **Goldman Sachs** is one of the leading investors in alternatives globally, with over \$625 billion in assets and more than 30 years of experience.
- **FGI** is a leader in the global commercial finance industry, equipping small and medium enterprises with the tools they need to enhance their business.
- **Strategic Rationale:** Goldman Sachs Alternatives' private-equity business acquires FGI Worldwide, a 25-year working-capital financing, asset-based lending and trade-credit-insurance provider (US/Canada/UK) with proprietary FGI Tech software; deepens Goldman's private-credit and specialty-finance platform.



Bullish



EQ

May 5: Bullish to acquire Equiniti from Siris

- **Bullish** is an institutionally focused global digital asset platform that provides regulated market infrastructure and information services.
- **Equiniti** delivers trusted data, intelligent insight, and seamless administration across the full equity ownership lifecycle.
- **Strategic Rationale:** The acquisition creates the global transfer agent for tokenized securities and aims to position Bullish to lead the shift toward blockchain-native capital markets infrastructure.

Recent Notable Capital Markets Transactions

LAZARD

CAMPBELL
LUTYENS 

April 30: Lazard to acquire Campbell Lutyens

- **Lazard** is a global financial advisory and asset management firm (NYSE: LAZ) headquartered in New York with a leading M&A and capital markets franchise.
- **Campbell Lutyens** is a leading independent private capital advisor focused on fund placement, secondary advisory, and GP capital advisory.
- **Strategic Rationale:** This acquisition scales Lazard's private capital advisory franchise, creating the leading private capital advisory platform globally by adding Campbell Lutyens' specialized fund placement, secondaries, and GP-led capabilities to capture growth across expanding private markets.

FitchGroup

Trepp®

April 30: Fitch Group Enters into Agreement to Acquire Trepp

- **Fitch Group** is a global financial information services provider (owned by Hearst) headquartered in London and New York, parent of Fitch Ratings, Fitch Solutions, and Fitch Learning.
- **Trepp** is a leading provider of data, insights, and technology solutions to the structured finance, commercial real estate, and banking sectors.
- **Strategic Rationale:** This acquisition advances the next generation of structured finance infrastructure, folding Trepp into Fitch Solutions to deepen proprietary data and broaden coverage across credit and CRE markets.

P/W/P

GLEACHER SHACKLOCK

April 13: Perella Weinberg Partners to acquire Gleacher Shacklock

- **Perella Weinberg Partners** is a leading global independent advisory firm, providing strategic and financial advice to a broad client base, including corporations, financial sponsors, governments, and sovereign wealth funds.
- **Gleacher Shacklock** is a market-leading, independent investment banking advisory firm based in London.
- **Strategic Rationale:** Adds a London independent advisory boutique (~30 professionals; M&A, debt/equity and restructuring advice; founded 2003) to expand Perella Weinberg's presence in the UK, Europe's largest advisory market; closing expected H2 2026.

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

(All figures in millions of USD, except per share data. Data as of June 5, 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 2026	CY 2027	LT	Gross	EBITDA	LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027	
Accenture	\$178.25	55.4%	\$109,435	\$109,941	\$72,110	\$12,735	6%	NA	NA	32%	18%	1.5x	1.5x	NA	8.6x	7.6x	NA	
Infosys	\$12.56	69.3%	\$50,837	\$50,809	\$211	\$46	n/m	NA	NA	30%	22%	NMF	3.3x	NA	NMF	10.8x	NA	
Cognizant Technology Solutions Corp	\$53.21	61.1%	\$25,215	\$24,790	\$21,406	\$3,891	6%	5%	6%	34%	18%	1.2x	1.1x	1.1x	6.4x	6.1x	5.6x	
Wipro	\$2.08	72.6%	\$21,807	\$18,264	\$9,716	\$1,795	6%	NA	NA	29%	18%	1.9x	1.8x	NA	10.2x	9.0x	NA	
Capgemini SE	\$117.55	65.9%	\$19,953	\$27,653	\$25,941	\$3,345	7%	4%	2%	27%	13%	1.1x	1.0x	1.0x	8.3x	6.2x	6.1x	
Booz Allen Hamilton Holding	\$79.48	66.2%	\$9,517	\$12,911	\$11,217	\$1,258	(0%)	NA	NA	22%	11%	1.2x	1.1x	NA	10.3x	10.4x	NA	
Genpact Limited	\$32.62	67.1%	\$5,529	\$6,357	\$5,161	\$865	7%	7%	8%	36%	17%	1.2x	1.2x	1.1x	7.4x	6.2x	5.6x	
Korn Ferry	\$72.32	92.1%	\$3,752	\$3,360	\$2,860	\$419	4%	NA	NA	25%	15%	1.2x	1.1x	NA	8.0x	6.6x	NA	
Veradigm	\$5.00	83.3%	\$851	\$783	\$594	(\$41)	(0%)	2%	(1%)	51%	(7%)	1.3x	1.3x	1.3x	NMF	8.7x	7.7x	
Conduent	\$1.53	51.3%	\$237	\$1,052	\$3,014	\$68	(10%)	(1%)	NMF	18%	2%	0.3x	0.4x	0.4x	15.5x	6.2x	5.2x	
MEAN								3%	4%	4%	30%	13%	1.2x	1.4x	1.0x	9.3x	7.8x	6.0x
MEDIAN								6%	4%	4%	29%	16%	1.2x	1.2x	1.1x	8.4x	7.1x	5.6x

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 2026	CY 2027	LT	Gross	EBITDA	LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027	
SS&C Technologies	\$69.91	76.8%	\$16,837	\$24,104	\$6,405	\$2,036	8%	5%	12%	48%	32%	3.8x	3.6x	3.4x	11.8x	9.0x	8.4x	
Cleanwater Analytics	\$24.37	97.2%	\$7,272	\$8,056	\$826	\$109	30%	17%	33%	66%	13%	9.8x	8.5x	7.2x	73.9x	24.2x	19.7x	
Temenos	\$88.09	80.5%	\$5,931	\$6,576	\$1,112	\$289	7%	7%	11%	74%	26%	5.9x	5.6x	5.3x	22.8x	14.4x	13.2x	
Intapp	\$24.35	41.4%	\$1,876	\$1,750	\$560	(\$19)	14%	NA	NA	75%	(3%)	3.1x	2.8x	NA	NMF	13.4x	NA	
MeridianLink	\$14.92	44.0%	\$1,635	\$1,873	\$610	\$72	9%	NA	NA	62%	12%	3.1x	2.9x	NA	26.2x	10.7x	NA	
IntegraFin Holdings	\$4.65	87.5%	\$1,542	\$1,171	\$221	\$175	11%	NA	NA	112%	79%	5.3x	4.9x	NA	6.7x	10.6x	NA	
Iress Limited	\$4.36	59.3%	\$810	\$886	\$400	\$77	(8%)	4%	NMF	37%	19%	2.2x	2.4x	2.3x	11.5x	8.3x	7.5x	
MEAN								10%	8%	19%	68%	25%	4.7x	4.4x	4.6x	25.5x	12.9x	12.2x
MEDIAN								9%	6%	12%	66%	19%	3.8x	3.6x	4.3x	17.3x	10.7x	10.8x

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 2026	CY 2027	LT	Gross	EBITDA	LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027	
CME Group	\$257.40	78.2%	\$93,271	\$94,498	\$6,744	\$4,793	8%	4%	8%	NA	71%	14.0x	13.4x	12.9x	19.7x	18.8x	18.1x	
Intercontinental Exchange	\$141.50	74.7%	\$80,150	\$100,356	\$10,435	\$6,624	11%	5%	11%	NA	63%	9.6x	9.1x	8.7x	15.2x	13.5x	12.9x	
Hong Kong Exchanges and Clearing	\$50.59	85.1%	\$63,951	\$42,409	\$3,855	\$2,949	7%	4%	14%	97%	77%	11.0x	10.7x	10.3x	14.4x	13.7x	13.3x	
Deutsche Börse	\$283.95	86.0%	\$51,709	\$60,380	\$8,706	\$3,757	(13%)	9%	81%	43%	81%	6.9x	8.1x	7.8x	16.1x	13.6x	12.9x	
Nasdaq	\$87.28	85.7%	\$49,360	\$58,351	\$5,419	\$3,216	(10%)	8%	15%	NA	59%	10.8x	10.1x	9.3x	18.1x	17.2x	15.8x	
Cboe Global Markets	\$280.38	75.5%	\$29,343	\$28,791	\$4,792	\$1,784	40%	4%	16%	54%	37%	6.0x	10.3x	9.9x	16.1x	14.3x	13.9x	
Singapore Exchange Limited	\$16.86	96.6%	\$18,032	\$16,975	\$1,105	\$626	8%	NA	NA	95%	57%	15.4x	14.3x	NA	27.1x	22.5x	NA	
Japan Exchange Group	\$12.50	93.2%	\$12,854	\$12,571	\$1,240	\$829	11%	NA	NA	67%	NA	10.1x	9.5x	NA	15.2x	15.6x	NA	
TMX Group Limited	\$35.59	85.5%	\$9,829	\$11,168	\$1,283	\$729	11%	8%	14%	93%	57%	8.7x	8.2x	7.6x	15.3x	14.6x	13.3x	
ASX Limited	\$33.72	64.6%	\$6,544	\$3,304	\$833	\$468	8%	NA	NA	93%	56%	4.0x	3.7x	NA	7.1x	6.3x	NA	
MEAN								2%	5%	12%	85%	59%	9.7x	9.8x	9.5x	16.4x	15.0x	14.3x
MEDIAN								8%	4%	14%	93%	58%	9.9x	9.8x	9.3x	15.7x	14.5x	13.3x

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 2026	CY 2027	LT	Gross	EBITDA	LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027	
Nelnet	\$129.03	89.4%	\$4,637	\$12,096	\$1,646	NA	1%	6%	NA	87%	NA	7.3x	7.2x	6.7x	NA	NA	NA	
Performant Financial Corporation	\$22.39	64.0%	\$4,223	\$5,440	\$1,665	NA	(12%)	2%	2%	NA	NA	3.3x	3.7x	3.6x	NA	6.8x	6.7x	
Encore Capital Group	\$81.46	87.9%	\$1,747	\$5,560	\$1,851	\$710	5%	2%	49%	NA	38%	3.0x	3.0x	2.9x	7.8x	8.0x	8.0x	
Navient Corporation	\$7.81	48.6%	\$734	\$45,278	\$329	NA	74%	12%	(29%)	NA	NA	NMF	NMF	NMF	NA	NA	NA	
PRA Group	\$16.01	71.0%	\$611	\$4,360	\$1,247	\$420	2%	(0%)	NMF	NA	34%	3.5x	3.6x	3.6x	10.4x	11.6x	11.7x	
MEAN								14%	5%	7%	87%	36%	4.3x	4.4x	4.2x	9.1x	8.8x	8.8x
MEDIAN								2%	2%	2%	87%	36%	3.4x	3.6x	3.6x	9.1x	8.0x	8.0x

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 2026	CY 2027	LT	Gross	EBITDA	LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027	
S&P Global	\$424.44	73.3%	\$125,626	\$142,748	\$15,730	\$7,873	8%	7%	12%	70%	50%	9.1x	8.6x	8.1x	18.1x	16.8x	15.5x	
Moody's	\$451.35	82.5%	\$78,840	\$84,882	\$7,873	\$3,814	7%	7%	15%	74%	48%	10.8x	10.3x	9.6x	22.3x	19.7x	18.0x	
RELX	\$34.99	64.9%	\$61,977	\$71,554	\$12,828	\$4,284	6%	6%	6%	66%	33%	5.6x	5.3x	5.0x	16.7x	13.0x	12.2x	
MSCI	\$615.46	95.5%	\$44,805	\$50,997	\$3,239	\$1,899	11%	9%	11%	83%	59%	15.7x	14.6x	13.4x	26.9x	23.6x	21.4x	
Thomson Reuters	\$86.27	39.5%	\$37,659	\$39,869	\$7,663	\$2,170	8%	8%	7%	39%	28%	5.2x	4.9x	4.6x	18.4x	12.3x	11.2x	
Gartner	\$164.02	38.1%	\$10,981	\$12,670	\$6,474	\$1,337	(1%)	5%	2%	69%	21%	2.0x	2.0x	1.9x	9.5x	8.0x	7.7x	
FactSet Research	\$255.62	56.4%	\$9,313	\$10,581	\$2,401	\$910	6%	NA	NA	52%	38%	4.4x	4.2x	NA	11.6x	11.2x	NA	
Morningstar	\$185.76	58.7%	\$7,064	\$8,438	\$2,508	\$640	7%	6%	24%	62%	25%	3.4x	3.2x	3.0x	13.2x	10.4x	9.5x	
CRISIL	\$40.69	63.2%	\$2,976	\$2,866	\$408	\$114	19%	12%	14%	47%	28%	7.0x	6.3x	5.6x	25.1x	20.7x	18.8x	
Value Line	\$32.49	80.2%	\$305	\$223	\$34	\$6	NA	NA	NA	82%	18%	6.6x	NA	NA	37.1x	NA	NA	
Marketwise	\$16.51	75.9%	\$44	NA	\$322	\$47	(1%)	1%	NA	86%	15%	NA	NA	NA	NA	NA	NA	
MEAN								7%	7%	11%	66%	33%	7.0x	6.6x	6.4x	19.9x	15.1x	14.3x
MEDIAN								7%	7%	11%	69%	28%	6.1x	5.3x	5.3x	18.3x	13.0x	13.9x

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

(All figures in millions of USD, except per share data. Data as of June 5, 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 2026	CY 2027	LT		CY 2026	CY 2027	LTM	CY 2026	CY 2027			
Blackstone	\$115.35	60.7%	\$90,607	\$48,327	\$14,397	\$3,054	12%	5%	44%	21%	6.3x	6.4x	6.1x	29.7x	13.7x	17.9x	NMF	37%
KKR & Co	\$93.40	60.7%	\$83,861	\$412,085	\$25,354	\$2,803	(3%)	(60%)	21%	11%	3.3x	3.3x	8.1x	29.9x	24.3x	23.9x	3.0x	11%
Apollo Global Management	\$128.03	81.4%	\$73,812	\$467,530	\$31,287	\$1,155	23%	(83%)	NMF	4%	2.4x	2.3x	13.5x	63.9x	23.5x	18.1x	4.0x	7%
EQT Corporation	\$53.75	78.8%	\$33,619	\$41,692	\$9,364	\$3,284	62%	18%	17%	35%	3.6x	4.1x	3.5x	10.2x	26.6x	35.5x	1.3x	14%
3i Group	\$29.55	49.1%	\$30,077	\$43,256	\$7,467	\$7,081	13%	2%	36%	95%	4.0x	4.1x	4.0x	4.2x	5.1x	5.6x	0.7x	19%
Ares Management Corporation	\$125.65	64.4%	\$28,336	\$28,395	\$5,909	\$562	44%	(12%)	44%	10%	4.8x	5.1x	5.8x	50.4x	46.1x	40.3x	NMF	20%
The Carlyle Group	\$43.48	62.2%	\$15,652	\$29,842	\$3,249	\$547	(15%)	(6%)	103%	17%	4.8x	3.9x	4.1x	28.6x	9.8x	13.3x	2.9x	10%
TPG	\$41.19	58.5%	\$6,609	\$13,307	\$3,732	\$90	35%	(42%)	31%	2%	1.8x	1.5x	2.7x	73.1x	9.4x	11.3x	5.8x	9%
MEAN							21%	(22%)	42%	24%	3.9x	3.8x	6.0x	36.3x	19.8x	20.7x	3.0x	16%
MEDIAN							18%	(9%)	36%	14%	3.8x	4.0x	4.9x	29.8x	18.6x	18.0x	2.9x	12%

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 2026	CY 2027	LT		CY 2026	CY 2027	LTM	CY 2026	CY 2027			
JPMorgan Chase & Co.	\$312.37	92.6%	\$836,999	\$4,900,475	\$173,559	\$57,512	1%	17%	4%	33%	4.8x	5.0x	4.3x	14.6x	23.3x	17.5x	2.4x	17%
Bank of America Corporation	\$53.83	93.5%	\$382,009	\$3,496,186	\$109,590	\$30,256	7%	13%	(1%)	28%	3.5x	3.6x	3.2x	12.6x	14.7x	15.4x	1.4x	11%
Wells Fargo & Company	\$81.94	83.8%	\$250,752	\$2,205,752	\$81,135	\$20,669	3%	10%	(5%)	25%	3.1x	3.1x	2.9x	12.1x	14.6x	12.8x	1.5x	13%
Citigroup	\$132.47	97.5%	\$225,938	\$2,777,687	\$78,734	\$14,697	7%	24%	(4%)	19%	2.9x	3.0x	2.4x	15.4x	16.2x	20.6x	1.2x	8%
Capital One Financial	\$180.67	69.6%	\$112,430	\$682,905	\$36,311	\$2,579	20%	94%	7%	7%	3.1x	3.4x	1.8x	43.6x	16.1x	23.4x	1.0x	3%
The Bank of New York Mellon	\$142.39	98.2%	\$97,734	\$561,517	\$20,754	\$5,719	8%	7%	(3%)	28%	4.7x	4.9x	4.6x	17.1x	26.1x	24.6x	2.5x	15%
The PNC Financial Services	\$228.37	93.6%	\$91,705	\$603,028	\$23,042	\$6,852	7%	15%	4%	30%	4.0x	4.1x	3.6x	13.4x	15.9x	16.2x	1.6x	13%
U.S. Bancorp	\$55.69	91.0%	\$86,750	\$700,998	\$26,647	\$7,432	5%	15%	(5%)	28%	3.3x	3.3x	2.9x	11.7x	15.8x	17.2x	1.5x	13%
Truist Financial Corporation	\$49.20	87.6%	\$61,297	\$548,975	\$3,185	\$5,194	62%	16%	21%	28%	3.3x	3.2x	2.9x	11.8x	9.3x	12.7x	1.0x	9%
Fifth Third Bancorp	\$52.01	93.8%	\$47,137	\$297,039	\$9,000	\$2,026	5%	54%	8%	23%	5.2x	5.6x	3.7x	23.3x	19.7x	19.1x	1.5x	8%
State Street Corporation	\$161.75	98.7%	\$44,767	\$14,393	\$2,825	\$7	7%	9%	0%	20%	3.1x	3.2x	2.9x	15.8x	16.3x	17.9x	1.9x	12%
OneMain Holdings	\$55.36	77.0%	\$6,396	\$27,018	\$3,040	\$796	19%	76%	7%	26%	2.1x	2.2x	1.2x	8.0x	7.0x	9.8x	1.9x	24%
Enova International	\$168.82	95.6%	\$4,211	\$6,877	\$1,580	\$327	20%	152%	26%	21%	2.7x	2.8x	1.1x	12.9x	18.6x	19.3x	3.0x	25%
The Bancorp	\$54.11	66.3%	\$2,253	\$9,899	\$531	\$231	NMF	(32%)	32%	43%	4.2x	4.3x	6.3x	9.7x	17.0x	11.7x	3.2x	30%
LendingClub Corporation	\$17.15	79.1%	\$1,978	\$11,940	\$1,372	\$176	15%	(21%)	33%	13%	1.4x	1.5x	1.9x	11.3x	13.5x	50.8x	1.3x	12%
Encore Capital Group	\$81.46	87.9%	\$1,747	\$5,451	\$1,851	\$296	34%	5%	8%	16%	0.9x	1.0x	0.9x	5.9x	8.9x	31.9x	1.7x	32%
MEAN							15%	28%	8%	24%	3.3x	3.4x	2.9x	14.9x	15.8x	20.1x	1.8x	15%
MEDIAN							7%	15%	6%	26%	3.2x	3.3x	2.9x	12.8x	16.0x	17.7x	1.6x	13%

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 2026	CY 2027	LT		CY 2026	CY 2027	LTM	CY 2026	CY 2027			
BlackRock	\$995.60	81.6%	\$154,551	\$170,237	\$25,638	\$6,255	19%	15%	5%	24%	6.0x	6.4x	5.5x	24.7x	28.7x	27.2x	2.7x	12%
The Bank of New York Mellon	\$142.39	98.2%	\$97,734	\$561,517	\$20,754	\$5,719	8%	7%	(3%)	28%	4.7x	4.9x	4.6x	17.1x	26.1x	24.6x	2.5x	15%
State Street Corporation	\$161.75	98.7%	\$44,767	\$14,393	\$2,825	\$7	7%	9%	0%	20%	3.1x	3.2x	2.9x	15.8x	16.3x	17.9x	1.9x	12%
Ameriprise Financial	\$454.66	82.6%	\$40,873	\$184,448	\$19,316	\$3,895	5%	2%	5%	20%	2.1x	2.2x	2.1x	10.5x	15.0x	13.1x	6.6x	67%
Northern Trust Corporation	\$170.47	98.2%	\$31,545	\$174,574	\$9,364	\$1,812	(2%)	9%	0%	22%	3.8x	3.9x	3.6x	17.4x	21.3x	24.2x	2.6x	15%
T. Rowe Price Group	\$105.99	89.7%	\$22,710	\$14,393	\$7,408	\$2,044	3%	3%	1%	28%	3.1x	3.1x	3.0x	11.1x	12.2x	13.0x	2.1x	19%
Amundi	\$98.33	94.5%	\$19,982	n.a.	\$7,944	\$1,892	2%	(49%)	6%	24%	2.5x	2.5x	5.0x	10.6x	14.7x	14.1x	1.4x	13%
Franklin Resources	\$31.33	96.5%	\$16,280	\$34,110	\$9,030	\$678	4%	3%	0%	8%	1.8x	1.8x	1.8x	24.0x	9.4x	12.3x	1.3x	6%
Schroders	\$7.82	97.5%	\$12,419	\$32,922	\$4,568	\$722	10%	(21%)	0%	16%	2.7x	2.7x	3.5x	17.2x	15.5x	17.4x	2.1x	12%
Invesco	\$27.35	92.4%	\$12,124	\$26,835	\$6,592	(\$667)	5%	(19%)	(6%)	(10%)	1.8x	1.9x	2.3x	NMF	15.7x	17.6x	1.2x	(7%)
MEAN							6%	(4%)	1%	18%	3.2x	3.3x	3.4x	16.5x	17.5x	18.1x	2.4x	16%
MEDIAN							5%	3%	0%	21%	2.9x	2.9x	3.2x	17.1x	15.6x	17.5x	2.1x	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 2026	CY 2027	LT		CY 2026	CY 2027	LTM	CY 2026	CY 2027			
The Charles Schwab	\$88.84	82.6%	\$154,551	\$493,319	\$24,804	\$9,019	22%	14%	22%	36%	6.2x	6.5x	5.7x	17.1x	20.9x	26.9x	3.6x	22%
Robinhood Markets	\$82.47	53.6%	\$74,265	\$45,474	\$4,613	\$1,897	52%	12%	NMF	41%	16.1x	16.6x	14.9x	39.1x	NMF	NMF	8.0x	22%
Interactive Brokers Group	\$84.40	92.7%	\$37,599	\$218,749	\$6,445	\$1,038	19%	13%	27%	16%	5.8x	6.1x	5.4x	36.2x	NMF	61.8x	6.7x	21%
Futu Holdings	\$92.33	45.6%	\$12,944	\$31,437	\$2,847	\$1,282	76%	13%	NA	45%	4.5x	4.8x	4.3x	10.1x	32.4x	22.2x	2.5x	28%
XP	\$15.34	66.3%	\$7,882	\$80,608	\$3,537	\$1,020	9%	15%	NA	29%	2.2x	2.3x	2.0x	7.7x	9.9x	9.6x	1.6x	23%
Swissquote Group Holding	\$48.07	66.3%	\$7,205	\$20,202	\$958	\$461	11%	0%	37%	48%	7.5x	7.5x	7.5x	15.6x	36.4x	26.3x	4.1x	29%
Virtu Financial	\$52.18	92.4%	\$4,541	\$25,115	\$3,050	\$516	28%	(14%)	9%	17%	1.5x	1.6x	1.9x	8.8x	8.5x	14.7x	2.6x	34%
Plus500	\$61.85	93.0%	\$4,307	\$944	\$281	\$3	3%	4%	(1%)	36%	5.5x	5.5x	5.3x	15.3x	11.6x	15.9x	7.7x	46%
MarketAxess Holdings	\$116.93	51.2%	\$4,156	\$2,302	\$871	\$309	4%	7%	9%	36%	4.8x	4.9x	4.6x	13.4x	16.6x	16.1x	3.5x	24%
AJ Bell	\$8.13	93.3%	\$3,212	\$393	\$464	\$165	18%	14%	NA	36%	6.9x	7.3x	6.4x	19.5x	46.1x	33.2x	NMF	60%
eToro	\$38.23	47.8%	\$3,040	\$1,859	\$12,377	\$238	9%	(93%)	NA	2%	0.2x	0.2x	3.1x	12.8x	NA	NA	2.3x	25%
CMC Markets	\$6.07	97.0%	\$1,655	\$1,347	\$521	\$99	12%	19%	30%	19%	3.2x	3.3x	2.7x	16.8x	25.4x	27.2x	NMF	17%
Mitsui Securities	\$5.82	92.6%	\$1,498	\$8,449	\$306	\$97	26%	(5%)	NA	32%	4.9x	5.2x	5.5x	15.5x	NA	NA	2.9x	19%
Monex Group	\$4.01	70.9%	\$999	\$4,660	\$467	\$68	9%	7%	NA	15%	2.1x	2.2x	2.0x	14.7x	NA	NA	1.3x	9%
UP Fintech Holding Limited	\$4.48	33.1%	\$797	\$8,862	\$568	\$114	63%	15%	NA	20%	1.4x	1.5x	1.3x	7.0x	62.9x	18.7x	0.9x	15%
MEAN							24%	1%	19%	28%	4.9x	5.0x	4.8x	16.6x				

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

(All figures in millions of USD, except per share data. Data as of June 5, 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 2026	CY 2027	LT		CY 2026	CY 2027	LTM	CY 2026	CY 2027			
State Street Corporation	\$161.75	98.7%	\$44,767	\$392,165	\$14,393	\$2,825	7%	9%	0%	20%	3.1x	3.2x	2.9x	15.8x	16.3x	17.9x	1.9x	12%
LPL Financial Holdings	\$288.49	71.5%	\$23,074	\$18,835	\$17,840	\$901	37%	24%	18%	5%	1.3x	1.4x	1.1x	25.6x	24.6x	18.8x	4.1x	20%
Broadridge Financial Solutions	\$151.34	55.7%	\$17,504	\$8,779	\$7,322	\$1,100	7%	6%	11%	15%	2.4x	2.4x	2.3x	15.9x	21.9x	19.9x	6.2x	42%
Computershare Limited	\$24.70	82.6%	\$14,286	\$5,104	\$3,188	\$598	4%	2%	8%	19%	4.5x	4.5x	4.4x	23.9x	28.5x	21.0x	6.4x	29%
SEI Investments Company	\$89.42	95.2%	\$10,755	\$3,275	\$2,368	\$738	8%	11%	1%	31%	4.5x	4.7x	4.2x	14.6x	20.5x	22.9x	4.4x	31%
Bravura Solutions Limited	\$1.66	67.0%	\$745	\$129	\$192	\$27	6%	5%	(54%)	14%	3.9x	3.9x	3.7x	27.1x	NMF	NMF	NMF	36%
MEAN							12%	10%	(3%)	17%	3.3x	3.4x	3.1x	20.5x	22.4x	20.1x	4.6x	28%
MEDIAN							7%	8%	5%	17%	3.5x	3.6x	3.3x	19.9x	21.9x	19.9x	4.4x	30%

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 2026	CY 2027	LT		CY 2026	CY 2027	LTM	CY 2026	CY 2027			
JPMorgan Chase & Co.	\$312.37	92.6%	\$836,999	\$4,900,475	\$173,559	\$57,512	1%	17%	4%	33%	4.8x	5.0x	4.3x	14.6x	23.3x	17.5x	2.4x	17%
Morgan Stanley	\$211.93	96.7%	\$334,274	\$1,581,418	\$73,174	\$17,503	14%	10%	7%	24%	4.6x	4.8x	4.3x	19.1x	30.7x	35.4x	3.2x	17%
The Goldman Sachs Group	\$1,038.68	94.6%	\$318,461	\$2,060,180	\$61,533	\$17,065	14%	7%	4%	28%	5.2x	5.4x	5.0x	18.7x	29.6x	40.3x	2.9x	16%
UBS Group	\$47.36	98.0%	\$143,948	\$1,686,521	\$51,311	\$9,115	3%	(17%)	8%	18%	2.8x	2.9x	3.5x	15.8x	20.3x	60.0x	1.6x	10%
Macquarie Group Limited	\$167.18	94.8%	\$61,233	\$381,913	\$13,863	\$3,318	11%	3%	15%	24%	4.4x	4.5x	4.4x	18.5x	17.1x	22.0x	2.4x	13%
Deutsche Bank	\$31.79	80.4%	\$59,742	\$1,712,502	\$34,440	\$6,923	0%	11%	85%	20%	1.7x	1.7x	1.6x	8.6x	10.9x	10.0x	0.7x	8%
Raymond James Financial	\$151.45	85.2%	\$29,515	\$91,944	\$14,723	\$2,140	10%	10%	14%	15%	2.0x	2.0x	1.9x	13.8x	17.8x	15.6x	2.3x	17%
Nomura Holdings	\$8.49	90.3%	\$24,823	\$390,894	\$13,526	\$2,260	16%	4%	NA	17%	1.8x	1.9x	1.8x	11.0x	NA	NA	1.1x	10%
Evercore	\$339.43	87.3%	\$13,130	\$4,314	\$4,554	\$747	29%	22%	4%	16%	2.9x	3.4x	2.8x	17.6x	24.8x	47.4x	7.4x	45%
Stifel Financial	\$70.72	78.7%	\$10,849	\$42,893	\$5,670	\$845	11%	9%	12%	15%	1.9x	2.0x	1.8x	12.8x	16.1x	20.4x	2.1x	17%
Houlihan Lokey	\$139.25	65.8%	\$9,617	\$4,309	\$2,618	\$426	13%	12%	18%	16%	3.7x	3.8x	3.4x	22.6x	26.9x	30.9x	4.1x	19%
Piper Sandler Companies	\$76.67	80.7%	\$5,447	\$2,130	\$2,017	\$282	24%	9%	25%	14%	2.7x	2.9x	2.6x	19.3x	27.1x	32.7x	3.9x	22%
Moelis & Company	\$67.86	86.8%	\$5,047	\$1,289	\$1,530	\$221	27%	12%	(4%)	14%	3.3x	3.3x	3.0x	22.8x	29.8x	NMF	NMF	46%
Lazard	\$46.36	78.9%	\$4,564	\$4,241	\$3,199	\$270	2%	9%	(8%)	8%	1.4x	1.5x	1.3x	16.9x	11.9x	60.8x	5.2x	36%
MEAN							13%	8%	14%	19%	3.1x	3.2x	3.0x	16.6x	22.0x	32.8x	3.0x	21%
MEDIAN							12%	10%	8%	17%	2.8x	3.1x	2.9x	17.2x	23.3x	31.8x	2.4x	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 2026	CY 2027	Lt		CY 2026	CY 2027	Ltm	CY 2026	CY 2027			
Capital One Financial	\$180.67	69.6%	\$112,430	\$682,905	\$36,311	\$2,579	20%	94%	7%	7%	3.1x	3.4x	1.8x	43.6x	16.1x	23.4x	1.0x	3%
Affirm Holdings	\$63.61	63.6%	\$12,303	\$13,142	\$3,972	\$382	34%	27%	Nmf	10%	5.4x	5.7x	4.5x	55.7x	Nmf	Nmf	5.6x	11%
FirstCash Holdings	\$225.44	95.5%	\$9,883	\$5,361	\$3,876	\$364	8%	17%	12%	9%	2.5x	2.7x	2.3x	27.9x	40.2x	35.7x	4.3x	16%
OneMain Holdings	\$55.36	77.0%	\$6,396	\$27,018	\$3,040	\$796	19%	76%	7%	26%	2.1x	2.2x	1.2x	8.0x	7.0x	9.8x	1.9x	24%
Credit Acceptance Corporation	\$544.71	93.9%	\$5,698	\$8,695	\$1,276	\$453	33%	72%	7%	36%	4.5x	4.6x	2.7x	12.6x	9.9x	10.6x	3.7x	28%
SLM Corporation	\$22.39	64.0%	\$4,223	\$29,410	\$1,665	\$733	15%	(12%)	(1%)	44%	2.5x	2.6x	2.9x	5.8x	9.2x	7.5x	1.9x	34%
Provident Financial Services, Inc.	\$22.50	93.8%	\$2,932	\$25,202	\$886	\$307	43%	7%	11%	35%	3.3x	3.4x	3.2x	9.6x	16.7x	22.8x	1.0x	11%
Upstart Holdings	\$29.74	34.1%	\$2,846	\$2,962	\$1,174	\$49	59%	31%	Na	4%	2.4x	2.6x	2.0x	57.6x	Nmf	Nmf	3.9x	7%
The Bancorp	\$54.11	66.3%	\$2,253	\$9,899	\$531	\$231	6%	(32%)	32%	43%	4.2x	4.3x	6.3x	9.7x	17.0x	11.7x	3.2x	30%
Zip Co	\$1.68	48.3%	\$2,111	\$2,813	\$863	\$77	24%	22%	Nmf	9%	2.4x	2.5x	2.0x	27.3x	Nmf	Nmf	4.6x	16%
EZCORA	\$31.95	86.1%	\$1,966	\$2,127	\$1,477	\$147	16%	25%	Na	10%	1.3x	1.4x	1.1x	13.4x	Na	26.7x	1.8x	15%
Pathward Financial	\$79.89	78.9%	\$1,686	\$7,112	\$777	\$189	6%	6%	14%	24%	2.2x	2.1x	2.0x	8.9x	11.9x	10.3x	2.0x	23%
Atlanticus Holdings Corporation	\$84.10	90.2%	\$1,271	\$7,465	\$629	\$126	39%	434%	Na	20%	2.0x	2.3x	0.4x	10.1x	11.5x	16.4x	2.0x	21%
Lufax Holding	\$1.45	31.7%	\$1,257	\$30,722	\$4,428	(\$310)	6%	(12%)	Na	(7%)	0.3x	0.3x	0.3x	Nmf	1.0x	9.6x	0.1x	(3%)
FinVolution Group	\$4.93	45.2%	\$1,212	\$3,792	\$1,969	\$326	4%	(6%)	(1%)	17%	0.6x	0.6x	0.6x	3.7x	3.5x	3.3x	0.5x	14%
EON Capital	\$14.56	32.4%	\$1,207	\$1,649	\$1,329	\$94	26%	13%	Nmf	7%	0.9x	0.9x	0.8x	12.8x	Nmf	72.8x	2.3x	22%
World Acceptance Corporation	\$167.30	90.2%	\$747	\$1,054	\$585	\$35	Nmf	7%	(29%)	6%	1.3x	1.3x	1.2x	21.6x	39.6x	12.6x	2.1x	9%
International Personal Finance	\$3.32	96.3%	\$730	\$1,789	\$986	\$72	Nmf	Na	(11%)	7%	0.7x	0.7x	Na	10.1x	11.8x	10.5x	1.0x	11%
Funding Circle Holdings	\$1.84	77.8%	\$532	\$717	\$273	\$62	28%	15%	Nmf	23%	1.9x	1.9x	1.7x	8.7x	Nmf	Nmf	1.7x	21%
Vanquis Banking Group	\$1.45	82.1%	\$363	\$5,272	\$370	\$10	5%	86%	(3%)	3%	1.0x	1.0x	0.5x	36.2x	2.8x	15.8x	0.6x	2%
LexinFintech Holdings	\$2.07	25.9%	\$341	\$3,361	\$1,972	\$214	(7%)	(4%)	(16%)	11%	0.2x	0.2x	0.2x	1.6x	2.2x	1.6x	0.2x	12%
Regional Management	\$35.93	78.1%	\$331	\$2,073	\$639	\$49	10%	13%	11%	8%	0.5x	0.5x	0.5x	6.8x	6.1x	20.7x	0.9x	13%
Opportun Financial Corporation	\$4.75	59.6%	\$217	\$3,168	\$727	\$18	(5%)	30%	15%	2%	0.3x	0.3x	0.2x	12.2x	3.1x	Nmf	0.5x	5%
Consumer Portfolio Services	\$9.43	89.9%	\$205	\$4,053	\$203	\$20	7%	Na	Na	10%	1.0x	1.0x	Na	10.1x	Na	Na	0.7x	7%
Humm Group	\$0.40	73.5%	\$203	\$3,791	\$190	\$15	80%	44%	(18%)	8%	1.1x	0.6x	0.4x	13.8x	7.6x	9.6x	0.5x	4%
Mean							21%	42%	2%	15%	1.9x	2.0x	1.7x	17.8x	12.0x	17.4x	1.9x	14%
Median							16%	17%	7%	10%	1.9x	1.9x	1.2x	11.2x	8.5x	11.7x	1.8x	13%



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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.

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