

DEALS & MARKET UPDATE

Capital Markets

October 2026



Tech-Enabled
Services



Software &
Analytics



Collections
Servicing



Infrastructure



Online
Brokers



Outsourced
Financial
Solutions



Financial Content
Providers



Wealth & Asset
Management



Alternative
Investments



Banking &
Lending



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

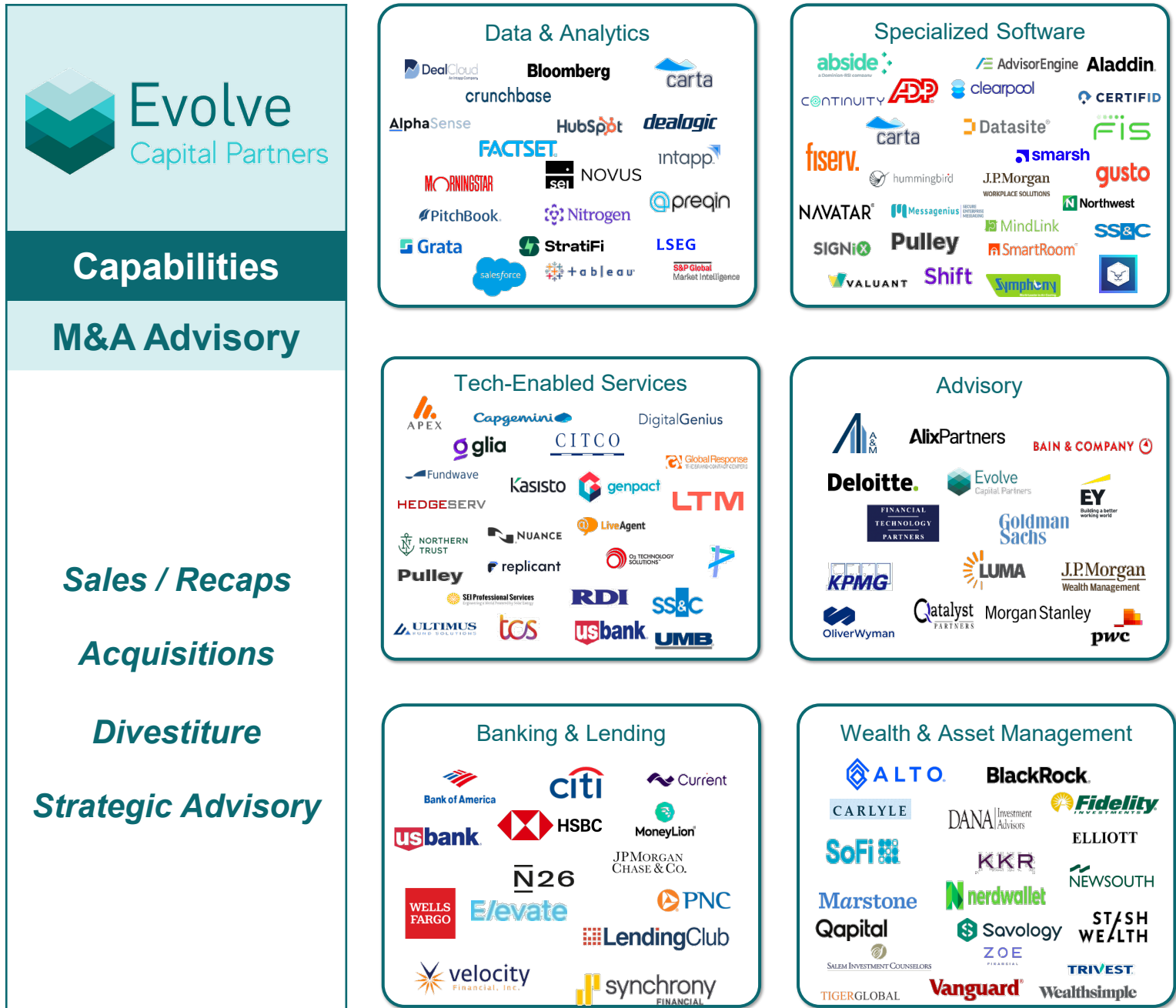
Undisclosed Private Investors

Investment Analytics Platform



We Focus Exclusively on Capital Markets-Related Firms

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





Capital Markets Industry M&A Update

M&A Market Update

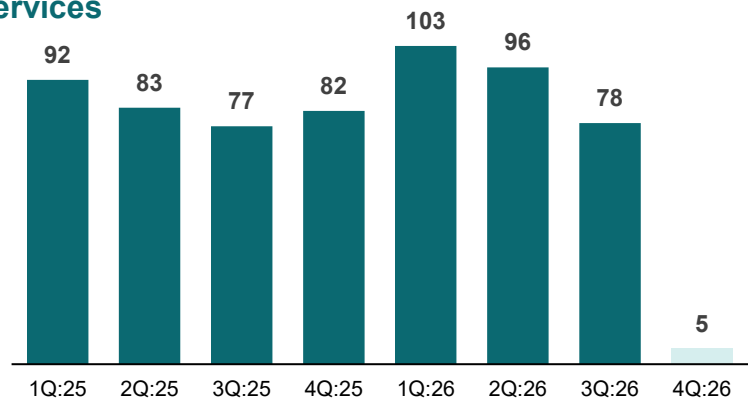
- Deal value has held up well in 2026, with YTD global value up 28% as buyers focused on fewer, larger deals, though 3Q26 was slower. Capital markets deal count fell to 315 from 419, and global value dropped 41% to \$993B. The 10-year Treasury yield hit its highest level since 2002, which made large deals harder to fund. One adviser called 3Q26 a return to normal rather than the end of the cycle.
- Trading platforms had a record quarter. The same jump in yields that slowed deals kept rate markets busy, so CME posted record 3Q26 volume, +16%, with Treasury futures and options +25%. Tradeweb's 3Q26 daily volume grew 22%.
- Services:** Activity is back to last year's level after a strong 2Q26, with 78 deals versus 77 a year ago. Buyers are still paying up for quality assets. ICE agreed to pay a 33% premium for MarketAxess to combine retail and institutional bond trading, and in early October KKR agreed to buy fund administrator Gen II for over \$5B.
- Software & Technology:** Buyers still want assets with proprietary data, as Bloomberg's purchase of Canoe Intelligence shows. Overall deals slowed to 168 from 213. Buyers and sellers struggle to agree on price because no one is sure how AI will affect each business. Many sellers now skip the auction and talk to a few buyers directly.
- Banks & Lenders:** Bank consolidation is set to pick up again, as excess capital, supportive regulators and the cost of investing in AI push banks to combine. Near term, deal count dropped to 69 from 110. Rising yields pushed the KBW Bank Index down 6% in 3Q26, and investors are watching whether higher rates will slow dealmaking.

Relevant News

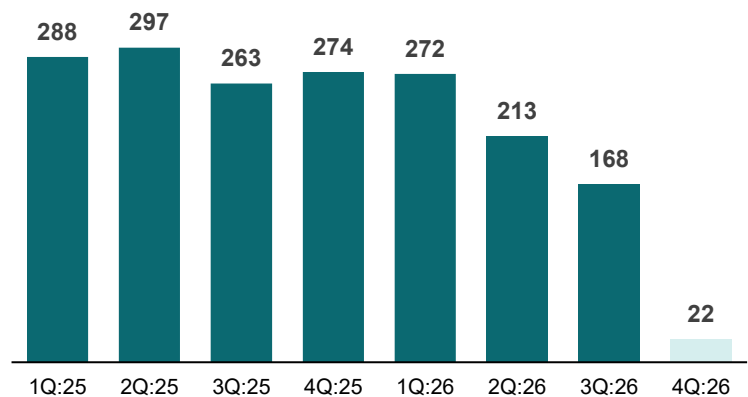
- 9/30: The SEC proposed changes to widen retail access to private markets through regulated funds, a potential tailwind for alternative managers.
- 9/17: The SEC approved a temporary exemption for limited on-chain trading of tokenized U.S.-listed stocks, enabling around-the-clock trading and near-instant settlement.

Announced M&A Transaction Count

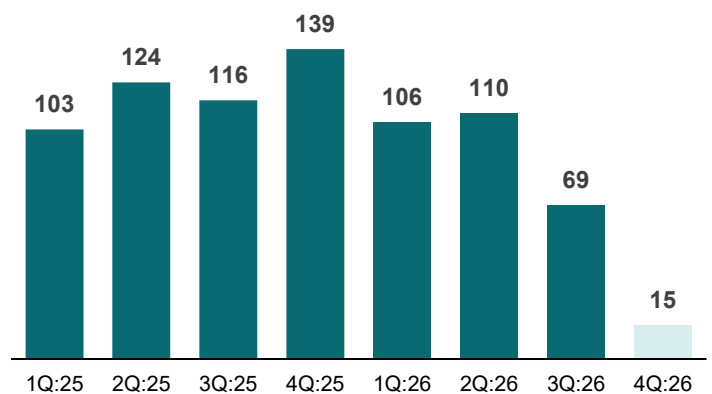
Services



Software & Technology



Banking & Lending



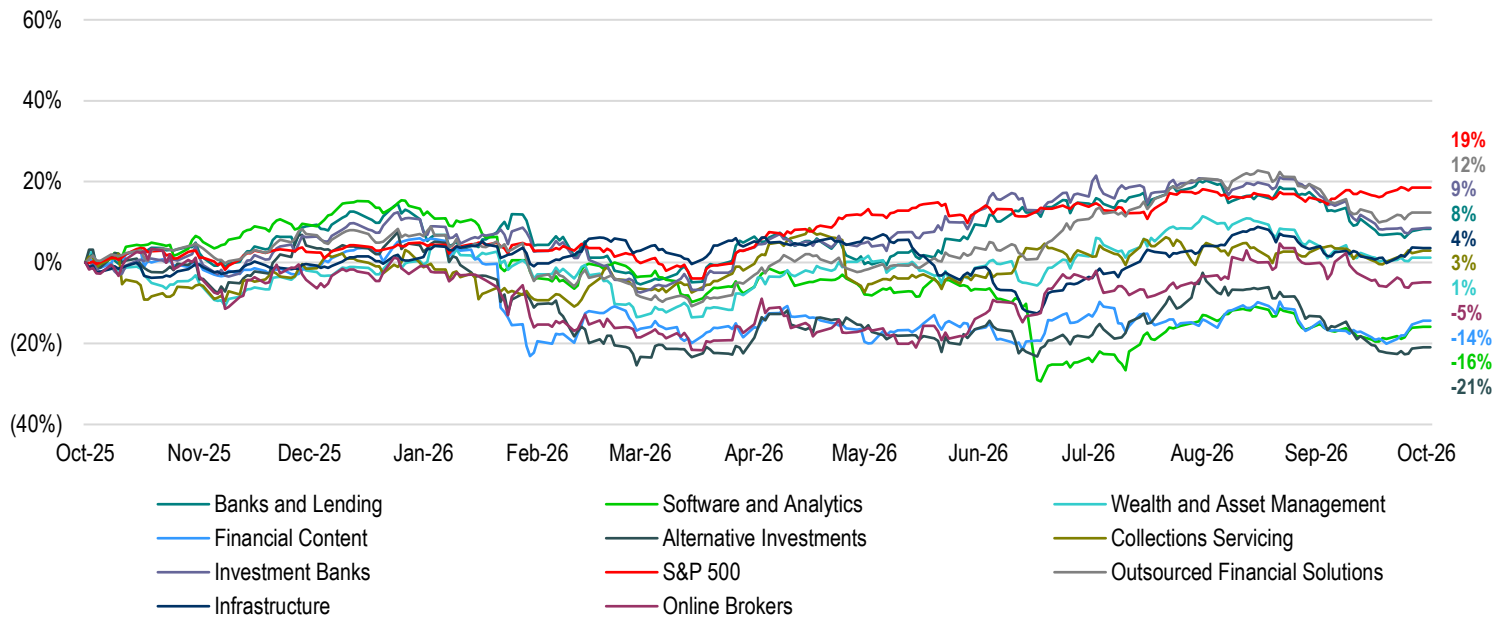
Data as of October 13, 2026
Source: Capital IQ



Market Summary and Key Multiples

Evolve's Capital Markets Industry Stock Market Performance

Last Twelve Months Capital Markets Sector Performance



Public Market Commentary

- Six of ten groups posted LTM gains, led by Outsourced Financial Solutions +12% and Investment Banks +9%. All still trailed the S&P 500's +19%, as AI stocks led the index and higher rates weighed on financials.
- Investment Banks:** 3Q26 profits at the largest banks are expected to rise about 20%, helped by strong deal and trading activity. The mood turned in mid-September, when Bank of America warned its banking fees would drop. Higher bond yields and pulled IPOs now have investors watching 4Q26 deal pipelines closely.
- Alternative Investments:** Shares now look cheap because of private credit worries, with Blue Owl trading near half its five-year average P/E. Investors want more money back than these funds can pay out, so withdrawals are capped and fundraising has slowed.
- Financial Content:** The businesses are holding up. FactSet is still growing and keeps nearly all its subscription revenue, though it sees slower growth ahead. Shares lagged on worries that AI will let clients get data more cheaply.

Capital Markets NTM P / E Multiples

Banks and Lending	9.5x
Collections Servicing	9.7x
Specialty Finance	11.0x
Wealth & Asset Management	11.8x
Alternative Investments	13.1x
Investment Banks	13.3x
Software & Analytics Solutions	14.1x
Online Brokers	14.5x
Outsourced Financial Solutions	16.5x
Financial Content Providers	18.1x
S&P 500	20.2x
Infrastructure	22.3x

Data as of October 13, 2026
Source: Capital IQ



Recent Notable Capital Markets Transactions



October 9: AvaTrade to Acquire Majority of FXCM

- **FXCM** is one of the longest-running Forex and CFD brands. Founded in 1999, it pioneered retail Forex trading and has been controlled by Jefferies since 2015.
- **AvaTrade** is an Ireland-based online broker founded in 2006, offering CFDs, futures and options on Forex, stocks, indices and commodities, plus copy trading.
- **Strategic Rationale:** Jefferies is exiting retail brokerage. AvaTrade adds a well-known brand and a global client base to its AI-powered platform, while FXCM's UK book went to Trade Nation. Terms were not disclosed.



October 6: Prosperum Acquires Yellow Tunnel

- **Yellow Tunnel** is an AI-powered retail investing platform for market analysis, stock screening and trade discovery.
- **Prosperum Fintech Holdings** is combining the platform with its Option Hotline service to form a new Investor Terminal product.
- **Strategic Rationale:** The deal gives Prosperum a broader AI-driven retail toolkit spanning analysis, screening and trade discovery in one terminal. Terms were not disclosed.



September 30: Trading Technologies Acquires TRAFIX

- **TRAFIX** is a New York-based provider of equities and equity options OEMS and FIX connectivity, serving more than 200 customers across 100+ trading venues.
- **Trading Technologies** is a trading software platform owned by Thoma Bravo and 7RIDGE, with roots in listed derivatives.
- **Strategic Rationale:** Equities and equity options were the main gap in TT's product set. Adding TRAFIX lets clients trade every major asset class on one cloud platform instead of juggling separate vendor systems. Terms were not disclosed.



September 22: FactSet Acquires BCC Group International

- **BCC Group International** is a German developer of cloud-native and hybrid market data distribution platforms.
- **FactSet** is folding the business into its Real-Time Solution Suite and enterprise market data management offering.
- **Strategic Rationale:** The deal expands FactSet's real-time and enterprise market-data distribution capabilities as clients push for more flexible, cloud-native delivery. Terms were not disclosed.

Recent Notable Capital Markets Transactions



September 17: S&P Global Acquires OpenZeppelin

- **OpenZeppelin** is a security standard for onchain finance, with its contracts underpinning more than \$37T of value transferred across 900-plus security engagements.
- **S&P Global Ratings** is acquiring the business to extend its risk assessment into onchain technology risk.
- **Strategic Rationale:** The deal gives S&P Global a direct foothold in assessing onchain infrastructure risk as tokenized and onchain capital markets activity grows. Terms were not disclosed.



August 11: eToro to Acquire TradeZero for up to \$231M

- **TradeZero** is a US-focused online brokerage for active traders, with its own broker-dealer infrastructure and operations in the US and Canada.
- **eToro** is a Nasdaq-listed trading and investing platform with millions of users worldwide.
- **Strategic Rationale:** TradeZero generated about \$80M of LTM revenue at an 81% gross margin, so the maximum price works out to roughly 2.9x revenue. Owning a US broker-dealer gives eToro a quicker path to launching new products in the US and adds access to Canada.



August 11: Nasdaq Acquires Level Markets

- **Level Markets** runs the third-largest US alternative trading system, trading more than 7,000 symbols daily for about 2,500 clients through 15-plus OMS/EMS integrations.
- **Nasdaq** already held a stake in Level and is acquiring the rest, folding it into its new Digital Liquidity Networks division.
- **Strategic Rationale:** The deal deepens Nasdaq's always-on markets strategy by bringing a major ATS fully in-house. Terms were not disclosed.



August 5: Equality Acquires OptionMetrics

- **OptionMetrics** provides proprietary options, futures and equity-linked data and analytics to asset managers, hedge funds, broker-dealers and prop trading firms.
- **Equality Asset Management** is acquiring the business from Leeds Equity Partners, with founder and CEO David Hait reinvesting.
- **Strategic Rationale:** The deal keeps a widely used options-data and analytics vendor independent and founder-aligned as prop trading and quant demand for options data grows. Terms were not disclosed.

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

(All figures in millions of USD, except per share data. Data as of October 13, 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	Revenue:		Earnings	Gross	EBITDA	LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027
							CY 2026	CY 2027									
Accenture	\$213.56	73.4%	\$127,182	\$129,431	\$74,183	\$13,419	6%	NA	NA	32%	18%	1.7x	1.7x	NA	9.6x	9.0x	NA
Infosys	\$11.18	61.5%	\$45,299	\$45,276	\$214	\$47	n/m	NA	NA	30%	22%	NMF	2.9x	NA	NMF	9.6x	NA
Cognizant Technology Solutions Corp	\$61.33	70.5%	\$27,626	\$28,669	\$21,642	\$4,036	5%	5%	5%	33%	19%	1.3x	1.3x	1.2x	7.1x	6.9x	6.4x
Capgemini SE	\$133.55	77.9%	\$22,669	\$31,548	\$26,240	\$3,451	8%	4%	2%	27%	13%	1.2x	1.2x	1.1x	9.1x	7.4x	7.2x
Wipro	\$1.78	61.8%	\$17,594	\$15,353	\$10,217	\$1,887	6%	NA	NA	29%	18%	1.5x	1.5x	NA	8.1x	7.6x	NA
Booz Allen Hamilton Holding	\$72.31	66.3%	\$8,698	\$12,318	\$11,093	\$1,255	(0%)	NA	NA	22%	11%	1.1x	1.1x	NA	9.8x	9.8x	NA
Genpact Limited	\$35.22	72.4%	\$5,918	\$6,812	\$5,250	\$879	7%	7%	8%	36%	17%	1.3x	1.3x	1.2x	7.7x	6.7x	6.1x
Korn Ferry	\$71.90	82.2%	\$3,923	\$3,711	\$2,955	\$420	16%	NA	NA	25%	14%	1.3x	1.1x	NA	8.8x	6.5x	NA
Veradigm	\$5.00	83.3%	\$851	\$797	\$594	(\$73)	NA	NA	NA	51%	(12%)	1.3x	NA	NA	NMF	NA	NA
Conduent	\$1.54	57.9%	\$240	\$1,005	\$2,939	\$76	(23%)	(6%)	NMF	19%	3%	0.3x	0.4x	0.5x	13.2x	6.8x	5.6x
MEAN							3%	2%	5%	30%	12%	1.2x	1.4x	1.0x	9.2x	7.8x	6.3x
MEDIAN							6%	4%	5%	29%	15%	1.3x	1.3x	1.1x	9.0x	7.4x	6.3x
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	Revenue:		Earnings	Gross	EBITDA	LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027
							CY 2026	CY 2027									
SS&C Technologies	\$81.52	90.6%	\$19,129	\$26,541	\$6,564	\$2,110	8%	5%	12%	48%	32%	4.0x	3.9x	3.7x	12.6x	9.9x	9.3x
Temenos	\$84.67	81.0%	\$5,808	\$6,453	\$1,108	\$298	7%	7%	11%	74%	27%	5.8x	5.5x	5.1x	21.7x	14.2x	13.0x
Intapp	\$39.64	82.7%	\$3,033	\$2,893	\$578	(\$16)	14%	NA	NA	76%	(3%)	5.0x	4.7x	NA	NMF	20.7x	NA
MeridianLink	\$19.71	71.7%	\$2,084	\$2,355	\$622	\$92	9%	NA	NA	62%	15%	3.8x	3.7x	NA	25.6x	13.5x	NA
IntegraFin Holdings	\$4.88	91.7%	\$1,617	\$1,250	\$219	\$173	12%	NA	NA	112%	79%	5.7x	5.2x	NA	7.2x	11.0x	NA
Iress Limited	\$3.83	52.8%	\$711	\$800	\$360	\$81	(11%)	3%	NMF	38%	23%	2.2x	2.3x	2.2x	9.8x	7.7x	7.1x
MEAN							7%	5%	11%	69%	29%	4.4x	4.2x	3.7x	15.4x	12.8x	9.8x
MEDIAN							8%	5%	11%	68%	25%	4.5x	4.3x	3.7x	12.6x	12.2x	9.3x
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	Revenue:		Earnings	Gross	EBITDA	LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027
							CY 2026	CY 2027									
CME Group	\$278.03	84.5%	\$99,974	\$101,567	\$6,757	\$4,771	8%	4%	8%	NA	71%	15.0x	14.4x	13.8x	21.3x	20.2x	19.4x
Intercontinental Exchange	\$156.42	88.8%	\$87,813	\$107,374	\$10,558	\$6,714	11%	6%	12%	NA	64%	10.2x	9.7x	9.2x	16.0x	14.4x	13.6x
Hong Kong Exchanges and Clearing	\$48.36	85.3%	\$61,133	\$39,931	\$4,012	\$3,077	11%	2%	15%	97%	77%	10.0x	9.7x	9.6x	13.0x	12.3x	12.2x
Deutsche Börse	\$334.60	95.7%	\$60,324	\$65,685	\$8,675	\$3,747	(11%)	5%	9%	80%	43%	7.6x	8.9x	8.5x	17.5x	14.9x	14.0x
Nasdaq	\$93.48	91.8%	\$52,253	\$61,020	\$5,614	\$3,353	12%	8%	16%	NA	60%	10.9x	10.3x	9.5x	18.2x	17.3x	15.8x
Cboe Global Markets	\$292.25	78.7%	\$30,520	\$29,746	\$5,061	\$1,931	(39%)	3%	17%	54%	38%	5.9x	10.4x	10.1x	15.4x	14.4x	13.9x
Singapore Exchange Limited	\$16.52	82.3%	\$17,649	\$16,428	\$1,218	\$712	10%	NA	NA	95%	58%	13.5x	13.1x	NA	23.1x	20.5x	NA
Japan Exchange Group	\$14.24	95.5%	\$14,533	\$14,529	\$1,395	\$952	25%	NA	NA	98%	68%	10.4x	9.7x	NA	15.3x	14.8x	NA
TMX Group Limited	\$37.46	92.9%	\$10,317	\$11,567	\$1,304	\$754	14%	13%	16%	93%	58%	8.9x	8.4x	7.4x	15.3x	14.6x	12.9x
ASX Limited	\$43.07	97.0%	\$8,407	\$5,344	\$881	\$461	10%	NA	NA	92%	52%	6.1x	5.9x	NA	11.6x	9.9x	NA
MEAN							5%	6%	13%	87%	59%	9.8x	10.1x	9.7x	16.7x	15.3x	14.5x
MEDIAN							11%	5%	15%	93%	59%	10.1x	9.7x	9.5x	15.7x	14.7x	13.9x
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	Revenue:		Earnings	Gross	EBITDA	LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027
							CY 2026	CY 2027									
Neinet	\$126.93	87.9%	\$4,541	\$11,410	\$1,489	NA	(0%)	6%	35%	86%	NA	7.7x	6.8x	6.4x	NA	NA	NA
Performant Financial Corporation	\$22.70	73.1%	\$4,266	\$5,718	\$1,686	NA	(13%)	1%	2%	NA	NA	3.4x	4.0x	4.0x	NA	6.9x	6.8x
Encore Capital Group	\$105.60	99.6%	\$2,240	\$6,243	\$1,901	\$746	8%	1%	55%	NA	39%	3.3x	3.3x	3.2x	8.4x	8.4x	8.4x
Navient Corporation	\$9.42	69.9%	\$883	\$44,515	\$334	NA	56%	7%	(27%)	NA	NA	NMF	NMF	NMF	NA	NA	NA
PRA Group	\$20.47	90.8%	\$771	\$4,496	\$1,331	\$488	8%	(5%)	NA	NA	37%	3.4x	3.4x	3.6x	9.2x	9.7x	10.9x
MEAN							12%	2%	16%	86%	38%	4.4x	4.4x	4.3x	8.8x	8.3x	8.7x
MEDIAN							8%	1%	18%	86%	38%	3.4x	3.7x	3.8x	8.8x	8.4x	8.4x
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	Revenue:		Earnings	Gross	EBITDA	LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027
							CY 2026	CY 2027									
S&P Global	\$409.99	74.2%	\$120,854	\$137,607	\$16,122	\$8,143	(3%)	5%	9%	71%	51%	8.5x	9.3x	8.8x	16.9x	17.6x	16.5x
Moody's	\$464.13	84.9%	\$80,378	\$86,643	\$8,160	\$4,053	7%	7%	15%	75%	50%	10.6x	10.5x	9.8x	21.4x	19.7x	18.2x
RELX	\$36.71	78.3%	\$63,857	\$75,386	\$12,876	\$4,361	5%	7%	6%	66%	34%	5.9x	5.7x	5.3x	17.3x	13.9x	12.9x
Thomson Reuters	\$105.26	64.0%	\$45,602	\$48,114	\$7,832	\$2,293	8%	7%	8%	40%	29%	6.1x	5.9x	5.5x	21.0x	14.9x	13.5x
MSCI	\$560.82	87.0%	\$40,772	\$46,963	\$3,334	\$1,962	12%	9%	10%	83%	59%	14.1x	13.3x	12.3x	23.9x	21.7x	19.8x
Gartner	\$196.96	75.4%	\$12,438	\$14,279	\$6,464	\$1,384	(1%)	4%	3%	70%	21%	2.2x	2.2x	2.1x	10.3x	8.9x	8.5x
FactSet Research	\$290.82	90.7%	\$10,343	\$11,620	\$2,476	\$881	6%	NA	NA	51%	36%	4.7x	4.6x	NA	13.2x	12.6x	NA
Morningstar	\$204.37	91.3%	\$7,667	\$9,048	\$2,567	\$680	9%	6%	24%	62%	26%	3.5x	3.4x	3.2x	13.3x	10.9x	10.0x
CRISIL	\$47.28	88.7%	\$3,458	\$3,396	\$434	\$123	22%	12%	14%	47%	28%	7.8x	7.2x	6.4x	27.5x	24.3x	21.1x
Value Line	\$44.25	94.1%	\$415	\$329	\$33	\$5	NA	NA	NA	82%	15%	10.0x	NA	NA	68.3x	NA	NA
Marktwise	\$19.38	84.9%	\$54	\$27	\$318	\$28	(4%)	9%	NMF	86%	9%	0.1x	0.1x	0.1x	1.0x	NMF	NMF
MEAN							6%	7%	11%	67%	33%	6.7x	6.2x	6.0x	21.3x	16.0x	15.1x
MEDIAN							7%	7%	10%	70%	29%	6.1x	5.8x	5.5x	17.3x	14.9x	15.0x

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

(All figures in millions of USD, except per share data. Data as of October 13, 2026)

Alternative Investments		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	
					Revenue	Net Income	CY 2026	CY 2027	LT		LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027	Book	ROE %
Blackstone	\$109.98	66.6%	\$87,977	\$49,892	\$15,483	\$3,519	12%	5%	44%	23%	5.7x	6.2x	5.9x	25.0x	13.3x	17.4x	9.8x	41%
KKR & Co	\$87.16	60.2%	\$78,238	\$414,463	\$25,833	\$2,990	(3%)	(57%)	21%	12%	3.0x	3.1x	7.0x	26.2x	22.7x	22.3x	2.7x	11%
Apollo Global Management	\$116.28	75.9%	\$68,668	\$494,048	\$35,598	\$1,888	23%	(83%)	NMF	5%	1.9x	2.2x	12.7x	36.4x	21.9x	16.8x	3.4x	10%
EQT Corporation	\$54.43	79.8%	\$34,047	\$41,321	\$9,294	\$2,712	62%	11%	17%	29%	3.7x	4.2x	3.7x	12.6x	27.0x	36.0x	1.3x	12%
3i Group	\$31.83	53.4%	\$31,896	\$42,838	\$7,395	\$7,013	13%	(0%)	36%	95%	4.3x	4.4x	4.4x	4.5x	5.4x	6.0x	0.8x	19%
Ares Management Corporation	\$115.62	63.8%	\$26,297	\$29,631	\$5,253	\$487	66%	2%	44%	9%	5.0x	5.4x	5.3x	54.0x	42.8x	37.4x	NMF	18%
The Carlyle Group	\$37.24	55.3%	\$13,270	\$28,196	\$2,797	\$364	(15%)	(10%)	103%	13%	4.7x	3.3x	3.6x	36.5x	8.4x	11.3x	2.5x	7%
TPG	\$42.89	60.9%	\$7,150	\$14,028	\$4,642	\$173	35%	(42%)	31%	4%	1.5x	1.7x	2.9x	41.3x	10.2x	12.2x	6.0x	16%
MEAN							24%	(22%)	42%	24%	3.7x	3.8x	5.7x	29.5x	19.0x	19.9x	3.8x	17%
MEDIAN							18%	(6%)	36%	12%	4.0x	3.7x	4.9x	31.3x	17.6x	17.1x	2.7x	14%

Banks and Lending		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	
					Revenue	Net Income	CY 2026	CY 2027	LT		LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027	Book	ROE %
JPMorgan Chase & Co.	\$331.43	90.4%	\$880,146	\$5,091,545	\$190,733	\$64,527	1%	24%	4%	34%	4.6x	5.2x	4.2x	13.6x	24.5x	18.4x	2.5x	19%
Bank of America Corporation	\$53.96	82.7%	\$377,329	\$3,427,704	\$114,875	\$30,763	7%	14%	(1%)	27%	3.3x	3.5x	3.1x	12.3x	14.5x	15.2x	1.4x	11%
Wells Fargo & Company	\$80.74	82.6%	\$242,352	\$2,253,291	\$83,112	\$21,977	3%	10%	(5%)	26%	2.9x	3.0x	2.7x	11.0x	14.1x	12.4x	1.5x	14%
Citigroup	\$124.53	84.2%	\$206,122	\$2,941,271	\$83,299	\$17,861	7%	27%	(4%)	21%	2.5x	2.7x	2.1x	11.5x	14.8x	18.8x	1.1x	9%
Capital One Financial	\$198.07	76.3%	\$121,513	\$673,835	\$48,110	\$9,823	20%	95%	7%	20%	2.5x	3.7x	1.9x	12.4x	17.4x	25.3x	1.2x	9%
The Bank of New York Mellon	\$141.03	85.0%	\$95,689	\$493,984	\$22,002	\$6,293	8%	12%	(3%)	29%	4.3x	4.8x	4.3x	15.2x	25.6x	24.1x	2.4x	16%
U.S. Bancorp	\$56.89	86.1%	\$88,638	\$702,966	\$27,886	\$7,999	5%	18%	(5%)	29%	3.2x	3.4x	2.9x	11.1x	16.1x	17.5x	1.5x	14%
The PNC Financial Services	\$219.48	84.8%	\$87,560	\$627,816	\$24,944	\$7,536	7%	18%	4%	30%	3.5x	3.9x	3.3x	11.6x	15.2x	15.5x	1.4x	13%
Truist Financial Corporation	\$45.92	81.7%	\$56,097	\$554,196	\$18,277	\$4,869	62%	12%	21%	27%	3.1x	3.0x	2.7x	11.5x	8.5x	11.7x	1.0x	8%
State Street Corporation	\$174.10	88.9%	\$47,826	\$403,341	\$15,495	\$3,449	7%	15%	0%	22%	3.1x	3.4x	3.0x	13.9x	17.4x	19.1x	1.9x	14%
OneMain Holdings	\$56.08	78.0%	\$6,452	\$27,424	\$3,020	\$781	19%	78%	7%	26%	2.1x	2.2x	1.2x	8.3x	7.1x	9.8x	1.9x	23%
Enova International	\$174.99	65.4%	\$4,357	\$7,222	\$1,692	\$355	20%	159%	26%	21%	2.6x	2.9x	1.1x	12.3x	19.1x	19.9x	2.9x	26%
Encore Capital Group	\$105.60	99.6%	\$2,240	\$5,565	\$1,901	\$302	34%	8%	8%	16%	1.2x	1.3x	1.2x	7.4x	11.5x	41.0x	2.1x	31%
The Bancorp	\$49.69	61.7%	\$2,027	\$9,216	\$532	\$232	NMF	(32%)	32%	44%	3.8x	3.9x	5.6x	8.7x	15.3x	10.5x	2.9x	30%
LendingClub Corporation	\$14.82	68.4%	\$1,710	\$12,549	\$1,394	\$196	15%	(20%)	33%	14%	1.2x	1.3x	1.6x	8.7x	11.7x	43.9x	1.1x	13%
MEAN							15%	29%	8%	26%	2.9x	3.2x	2.7x	11.3x	15.5x	20.2x	1.8x	17%
MEDIAN							8%	15%	4%	26%	3.1x	3.4x	2.7x	11.5x	15.2x	18.4x	1.5x	14%

Wealth & Asset Management		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				
					Revenue	Net Income	Revenue		Earnings LT		LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027	Book	ROE %
							CY 2026	CY 2027													
BlackRock	\$1,066.12	89.8%	\$165,109	–	\$28,542	\$6,912	19%	22%	5%	24%	5.8x	6.8x	5.6x	23.9x	30.6x	29.0x	2.9x	12%			
The Bank of New York Mellon	\$141.03	85.0%	\$95,689	\$493,984	\$22,002	\$6,293	8%	12%	(3%)	29%	4.3x	4.8x	4.3x	15.2x	25.6x	24.1x	2.4x	16%			
State Street Corporation	\$174.10	88.9%	\$47,826	\$403,341	\$15,495	\$3,449	7%	15%	0%	22%	3.1x	3.4x	3.0x	13.9x	17.4x	19.1x	1.9x	14%			
Ameriprise Financial	\$493.32	86.2%	\$43,577	\$197,871	\$19,839	\$3,948	5%	6%	5%	20%	2.2x	2.3x	2.2x	11.0x	16.0x	14.0x	6.9x	63%			
Northern Trust Corporation	\$167.48	85.5%	\$30,641	\$179,297	\$9,086	\$2,181	(2%)	15%	0%	24%	3.4x	3.6x	3.3x	14.0x	20.7x	23.5x	2.4x	18%			
T. Rowe Price Group	\$101.39	83.1%	\$21,628	\$15,357	\$7,592	\$2,167	3%	6%	1%	29%	2.8x	3.0x	2.8x	10.0x	11.6x	12.4x	2.0x	20%			
Amundi	\$99.41	90.9%	\$20,038	n.a.	\$8,044	\$1,508	2%	(46%)	6%	19%	2.5x	2.6x	4.9x	13.3x	15.2x	14.6x	1.4x	11%			
Franklin Resources	\$31.18	85.9%	\$15,842	\$36,243	\$9,324	\$759	3%	1%	0%	8%	1.7x	1.8x	1.8x	20.9x	9.2x	12.0x	1.3x	6%			
DWS Group	\$74.72	84.8%	\$14,945	\$13,457	\$5,359	\$1,136	11%	(28%)	9%	21%	2.8x	2.9x	4.0x	13.2x	22.5x	19.9x	1.8x	14%			
Invesco	\$28.92	85.9%	\$12,768	\$27,473	\$6,903	(\$309)	5%	(15%)	(6%)	(4%)	1.8x	2.0x	2.4x	NMF	16.5x	18.5x	1.3x	(3%)			
MEAN							6%	(1%)	2%	19%	3.0x	3.3x	3.4x	15.0x	18.5x	18.7x	2.4x	17%			
MEDIAN							5%	6%	1%	22%	2.8x	2.9x	3.2x	13.9x	17.0x	18.8x	1.9x	14%			

Online Brokers		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	
					Revenue	Net Income	CY 2026	CY 2027	LT		LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027	Book	ROE %
The Charles Schwab	\$95.94	83.8%	\$165,912	\$520,700	\$27,061	\$10,257	22%	17%	22%	38%	6.1x	6.9x	5.9x	16.2x	22.5x	28.9x	3.2x	22%
Robinhood Markets	\$110.52	73.4%	\$99,367	\$56,550	\$4,932	\$2,072	52%	18%	NMF	42%	NMF	NMF	18.7x	48.0x	NMF	NMF	NMF	24%
Interactive Brokers Group	\$87.49	88.6%	\$39,640	\$243,235	\$7,058	\$1,177	19%	20%	27%	17%	5.6x	6.4x	5.3x	33.7x	NMF	65.2x	6.4x	21%
Futu Holdings	\$114.06	56.3%	\$15,990	\$37,281	\$3,065	\$1,416	76%	20%	203%	46%	5.2x	6.0x	5.0x	11.3x	40.1x	27.5x	3.2x	31%
XP	\$31.38	95.9%	\$15,925	\$81,631	\$3,727	\$1,064	9%	13%	72%	29%	4.3x	4.5x	4.0x	15.0x	19.5x	18.9x	3.2x	23%
Swissquote Group Holding	\$42.28	68.5%	\$6,336	\$20,295	\$924	\$435	11%	(3%)	37%	47%	6.9x	6.9x	7.2x	14.6x	33.5x	24.2x	3.8x	28%
MarketAxess Holdings	\$164.45	83.9%	\$5,787	\$2,422	\$870	\$306	4%	6%	9%	35%	6.7x	6.8x	6.5x	18.9x	23.1x	22.4x	4.7x	23%
Virtu Financial	\$55.94	81.4%	\$4,940	\$27,477	\$3,264	\$518	28%	(3%)	9%	16%	1.5x	1.7x	1.8x	9.5x	9.3x	16.0x	2.6x	32%
Plus500	\$44.03	60.1%	\$3,126	\$1,024	\$831	\$284	3%	7%	(1%)	34%	3.8x	4.0x	3.7x	11.0x	8.4x	11.5x	5.2x	47%
AJ Bell	\$7.82	89.1%	\$3,079	\$389	\$459	\$163	18%	16%	21%	36%	6.7x	7.0x	6.0x	18.9x	44.6x	32.2x	NMF	60%
CMC Markets	\$8.86	85.0%	\$2,390	\$1,334	\$517	\$98	12%	37%	30%	19%	4.6x	4.8x	3.5x	24.3x	37.0x	39.6x	3.9x	17%
eToro	\$24.86	56.2%	\$1,977	\$1,818	\$11,981	\$261	9%	(93%)	NMF	2%	0.2x	0.1x	2.2x	7.6x	NMF	NMF	1.5x	19%
Matsui Securities	\$7.19	93.0%	\$1,853	\$9,623	\$342	\$115	26%	35%	NA	34%	5.4x	6.4x	4.7x	16.1x	NA	NA	3.6x	23%
Monex Group	\$4.33	84.8%	\$1,088	\$4,914	\$570	\$69	19%	(6%)	23%	12%	1.9x	2.0x	2.1x	15.7x	29.7x	12.7x	1.3x	9%
UP Fintech Holding Limited	\$4.34	38.2%	\$773	\$9,750	\$607	\$112	63%	29%	NMF	18%	1.3x	1.4x	1.1x	6.9x	61.0x	18.1x	0.9x	14%
MEAN							25%	8%	41%	28%	4.3x	4.6x	5.2x	17.8x	29.9x	26.4x	3.3x	26%
MEDIAN							19%	16%	23%	34%	4.9x	5.4x	4.7x	15.7x	29.7x	23.3x	3.7x	23%

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

(All figures in millions of USD, except per share data. Data as of October 13, 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	Revenue		Earnings		LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027			LTM	CY 2026	CY 2027	
							CY 2026	CY 2027	LT													
State Street Corporation	\$174.10	88.9%	\$47,826	\$403,341	\$15,495	\$3,449	7%	15%	0%	22%	3.1x	3.4x	3.0x	13.9x	17.4x	19.1x	1.9x	14%				
LPL Financial Holdings	\$325.63	81.4%	\$25,640	\$19,791	\$19,196	\$1,007	37%	26%	18%	5%	1.3x	1.5x	1.2x	25.5x	27.4x	20.9x	4.5x	19%				
Broadridge Financial Solutions	\$168.44	71.4%	\$19,017	\$8,945	\$7,477	\$1,124	7%	7%	11%	15%	2.5x	2.6x	2.5x	16.9x	23.8x	21.7x	6.8x	41%				
Computershare Limited	\$28.49	93.1%	\$16,477	\$4,967	\$3,268	\$619	5%	3%	8%	19%	5.0x	5.2x	5.0x	26.6x	32.9x	24.2x	7.2x	28%				
SEI Investments Company	\$105.51	94.1%	\$12,663	\$3,324	\$2,450	\$707	8%	12%	1%	29%	5.2x	5.5x	4.9x	17.9x	24.2x	27.0x	5.1x	29%				
Bravura Solutions Limited	\$2.23	87.9%	\$981	\$144	\$199	\$77	6%	5%	(54%)	39%	4.9x	5.1x	4.9x	12.7x	NMF	NMF	NMF	NMF				
MEAN							12%	11%	(3%)	22%	3.7x	3.9x	3.6x	18.9x	25.1x	22.6x	5.1x	26%				
MEDIAN							7%	10%	5%	21%	4.0x	4.3x	3.9x	17.4x	24.2x	21.7x	5.1x	28%				

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	Revenue		Earnings LT		LTM	CY 2026	CY 2027	LTM	CY 2026	CY 2027			
							CY 2026	CY 2027											
JPMorgan Chase & Co.	\$331.43	90.4%	\$880,146	\$5,091,545	\$190,733	\$64,527	1%	24%	4%	34%	4.6x	5.2x	4.2x	13.6x	24.5x	18.4x	2.5x	19%	
Morgan Stanley	\$186.64	80.4%	\$293,130	—	\$79,794	\$19,848	14%	17%	7%	25%	3.7x	4.2x	3.6x	14.8x	26.9x	31.0x	2.8x	19%	
The Goldman Sachs Group	\$891.91	77.3%	\$270,039	\$2,182,000	\$71,036	\$21,252	14%	22%	4%	30%	3.8x	4.5x	3.7x	12.7x	25.1x	34.2x	2.4x	19%	
UBS Group	\$48.15	89.0%	\$147,418	\$1,707,284	\$53,040	\$9,520	3%	(11%)	8%	18%	2.8x	3.0x	3.4x	15.5x	20.8x	61.4x	1.7x	11%	
Macquarie Group Limited	\$175.93	94.0%	\$64,878	\$377,217	\$13,693	\$3,277	11%	3%	15%	24%	4.7x	4.9x	4.7x	19.8x	18.3x	23.6x	2.6x	13%	
Deutsche Bank	\$33.40	83.2%	\$61,922	\$1,703,221	\$34,104	\$6,819	0%	12%	85%	20%	1.8x	1.9x	1.7x	9.1x	11.7x	10.7x	0.7x	8%	
Raymond James Financial	\$156.76	85.8%	\$30,155	\$94,237	\$15,240	\$2,299	10%	12%	14%	15%	2.0x	2.1x	1.9x	13.1x	18.1x	16.0x	2.4x	18%	
Nomura Holdings	\$9.59	90.0%	\$28,026	\$430,494	\$14,709	\$2,544	16%	14%	NMF	17%	1.9x	2.1x	1.9x	11.0x	42.2x	30.1x	1.2x	11%	
Stifel Financial	\$69.70	77.6%	\$10,525	\$44,908	\$5,835	\$916	11%	9%	12%	16%	1.8x	1.9x	1.8x	11.5x	15.6x	19.8x	2.0x	18%	
Evercore	\$263.94	67.9%	\$10,151	\$4,701	\$4,710	\$745	29%	20%	4%	16%	2.2x	2.6x	2.2x	13.6x	19.2x	36.7x	5.5x	42%	
Houlihan Lokey	\$129.53	63.4%	\$9,052	\$3,717	\$2,524	\$406	13%	2%	18%	16%	3.6x	3.5x	3.5x	22.3x	25.3x	29.0x	4.0x	18%	
Piper Sandler Companies	\$63.87	67.2%	\$4,292	\$2,327	\$2,115	\$307	24%	10%	25%	15%	2.0x	2.3x	2.1x	14.0x	21.3x	25.8x	3.1x	24%	
Moelis & Company	\$56.39	72.1%	\$4,177	\$1,408	\$1,574	\$228	27%	14%	(4%)	15%	2.7x	2.8x	2.4x	18.3x	24.7x	NMF	8.3x	45%	
Lazard	\$36.52	62.2%	\$3,559	\$4,365	\$3,199	\$219	2%	8%	(8%)	7%	1.1x	1.1x	1.1x	16.2x	9.3x	47.4x	3.9x	26%	
MEAN							13%	11%	14%	19%	2.8x	3.0x	2.7x	14.7x	21.6x	29.5x	3.1x	21%	
MEDIAN							12%	12%	8%	17%	2.4x	2.7x	2.3x	13.8x	21.1x	29.0x	2.5x	19%	

Specialty Finance		Market data				Operating performance						Valuation multiples						
Company name	stock price	% OF 52-Wk. High	market value	total assets	Ltm		Growth rates:			ltn net Income %	mv / rev.			P / E			price book	Roe %
					revenue	Net income	revenue		earnings Lt		Ltm	CY 2026	CY 2027	Ltm	CY 2026	CY 2027		
							CY 2026	CY 2027										
Capital One Financial	\$198.07	76.3%	\$121,513	\$673,835	\$48,110	\$9,823	20%	95%	7%	20%	2.5x	3.7x	1.9x	12.4x	17.4x	25.3x	1.2x	9%
Affirm Holdings	\$77.89	86.1%	\$26,282	\$15,790	\$4,261	\$1,930	35%	30%	Nmf	45%	6.2x	7.0x	5.4x	13.6x	Nmf	Nmf	4.8x	45%
FirstCash Holdings	\$218.83	91.6%	\$9,491	\$5,486	\$4,120	\$388	8%	20%	12%	9%	2.3x	2.6x	2.2x	24.5x	38.6x	34.3x	4.1x	17%
OneMain Holdings	\$56.08	78.0%	\$6,452	\$27,424	\$3,020	\$781	19%	78%	7%	26%	2.1x	2.2x	1.2x	8.3x	7.1x	9.8x	1.9x	23%
Credit Acceptance Corporation	\$545.96	81.6%	\$5,667	\$8,623	\$1,303	\$502	33%	91%	7%	39%	4.3x	4.6x	2.4x	11.3x	7.9x	10.6x	3.6x	32%
SLM Corporation	\$22.70	73.1%	\$4,266	\$28,579	\$1,686	\$721	15%	(13%)	(1%)	43%	2.5x	2.6x	3.0x	5.9x	9.3x	7.6x	1.9x	33%
Provident Financial Services, Inc.	\$22.04	86.5%	\$2,875	\$25,663	\$894	\$313	43%	8%	11%	35%	3.2x	3.3x	3.1x	9.2x	16.4x	22.4x	1.0x	11%
Upstart Holdings	\$23.83	43.2%	\$2,319	\$3,171	\$1,286	\$60	59%	32%	Nmf	5%	1.8x	2.2x	1.6x	38.4x	Nmf	Nmf	2.9x	8%
EZCORP	\$33.07	89.1%	\$2,032	\$2,166	\$1,584	\$158	16%	25%	4%	10%	1.3x	1.5x	1.2x	12.8x	36.9x	27.6x	1.7x	15%
The Bancorp	\$49.69	61.7%	\$2,027	\$9,216	\$532	\$232	6%	(32%)	32%	44%	3.8x	3.9x	5.6x	8.7x	15.3x	10.5x	2.9x	30%
Zip Co	\$1.48	43.0%	\$1,845	\$2,701	\$933	\$81	24%	23%	Nmf	9%	2.0x	2.2x	1.8x	22.7x	Nmf	Nmf	3.9x	17%
Pathward Financial	\$71.85	71.0%	\$1,493	\$7,314	\$752	\$176	5%	5%	14%	23%	2.0x	1.9x	1.8x	8.5x	10.6x	9.1x	1.8x	21%
ECN Capital	\$17.82	57.4%	\$1,487	\$1,693	\$1,390	\$123	26%	12%	Nmf	9%	1.1x	1.1x	1.0x	12.1x	Nmf	Nmf	2.5x	26%
Atlanticus Holdings Corporation	\$94.75	82.9%	\$1,437	\$7,492	\$730	\$145	39%	443%	94%	20%	2.0x	2.6x	0.5x	9.9x	13.0x	18.5x	2.0x	23%
World Acceptance Corporation	\$177.24	77.8%	\$802	\$1,079	\$591	\$39	2%	5%	(29%)	7%	1.4x	1.4x	1.3x	20.5x	42.5x	13.4x	2.2x	10%
Lufax Holding	\$0.92	26.7%	\$797	\$30,281	\$4,243	(\$333)	6%	(15%)	(11%)	(8%)	0.2x	0.2x	0.2x	Nmf	0.6x	6.0x	0.1x	(3%)
FinVolution Group	\$3.07	43.5%	\$755	\$3,895	\$1,966	\$285	Nmf	(17%)	(1%)	14%	0.4x	0.4x	0.4x	2.7x	2.1x	2.1x	0.3x	12%
Funding Circle Holdings	\$2.56	76.6%	\$740	\$703	\$331	\$83	Nmf	30%	Nmf	25%	2.2x	2.7x	2.1x	8.9x	Nmf	Nmf	2.4x	29%
Oportun Financial Corporation	\$9.17	98.1%	\$422	\$3,129	\$744	\$19	(5%)	30%	15%	3%	0.6x	0.6x	0.4x	21.6x	6.1x	Nmf	1.0x	5%
Regional Management	\$34.41	77.7%	\$317	\$2,130	\$648	\$47	10%	10%	11%	7%	0.5x	0.5x	0.5x	6.8x	5.9x	19.9x	0.8x	13%
Vanquis Banking Group	\$0.92	52.8%	\$231	\$5,825	\$355	\$9	5%	75%	(3%)	3%	0.7x	0.6x	0.4x	24.9x	1.8x	10.1x	0.4x	2%
Consumer Portfolio Services	\$9.16	87.3%	\$197	\$4,422	\$212	\$22	7%	Na	61%	10%	0.9x	1.0x	Na	9.1x	2.3x	4.4x	0.6x	7%
Humm Group	\$0.27	50.3%	\$139	\$3,537	\$176	\$11	2%	64%	(18%)	6%	0.8x	0.7x	0.5x	12.7x	5.3x	6.6x	0.4x	3%
LexisFinTech Holdings	\$0.69	11.7%	\$114	\$3,344	\$1,936	\$155	(7%)	(23%)	(16%)	8%	0.1x	0.1x	0.1x	0.7x	0.7x	0.5x	0.1x	9%
Mean							17%	42%	10%	17%	1.9x	2.1x	1.7x	13.3x	12.6x	13.3x	1.9x	16%
Median							12%	23%	7%	10%	1.9x	2.0x	1.3x	11.3x	7.9x	10.3x	1.8x	14%



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