

# Global

In H1'18, global investment in fintech companies hit

**\$57.9** across  
**875** deals



Global fintech investment in H1'18 (venture capital, private equity and M&A) already exceeds 2017's annual total



Overall venture capital deal volume remained steady throughout H1'18 with continued strength at all deal stages



Global median venture deal size for late-stage investment rose from

**\$14M** in 2017 to  
**\$25M** in 2018 (year-to-date)



Regtech investment reached

**\$1.37B** in H1'18 — already surpassing 2017 annual totals



# Americas

In H1'18, fintech investment in the Americas reached

**\$14.8B** across  
**504** deals

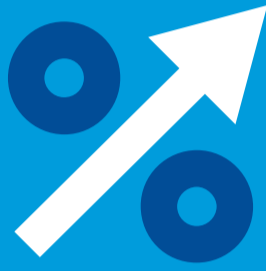


**96%**

of deal value in the Americas came from the US



Fintech venture capital deal volume reached new heights during the first half of 2018



Canadian deal value dropped in H1'18 as compared to

**H2'17** but deal, volume remained strong



# US

In H1'18, US fintech companies received

**\$14.2B** in investment, including over **\$5B** in venture capital investment



Fintech value and investment volume rebounded in

**H1'18**



# Investors

were quick to invest in new startups in emerging fintech sub-segments, including regtech and investment banking



# Top deals

were spread across the country — with California and Massachusetts leading the way



# Europe

In H1'18, investment in fintech companies in Europe hit

**\$26B** across  
**198** deals



Median venture capital angel/seed — stage deal size increased from

**\$1.2M** in 2017 to  
**\$1.5M** in 2018 (year-to-date)



Median merger & acquisition size in Europe increased from

**\$23.7M** in 2017 to  
**\$60.4M** in 2018 (year-to-date)



The UK led the charge with over

**\$16B** in total fintech investment



# Asia

In H1'18, investment in fintech companies in Asia hit

**\$16.8B** across  
**162** deals



Ant Financial's massive

**\$14B**

Series C funding round in Q2'18 was a huge outlier



Fintech mergers & acquisitions rebounded during Q2'18 with

**\$611M** invested



Fintech venture capital deal volume in India rose to a record high of

**31 deals** in Q2'18



China and India dominated the top

**10 deals** with 6 and 4 massive deals, respectively

