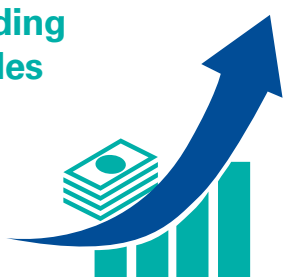


## 2015 fintech funding more than doubles 2014 total:

Globally, funding to VC-backed companies in 2015 hit an all-time high of

**\$13.8B**, up **106%** vs. **2014**.



## Fintech deals taper off in second half of 2015:

Deal activity fell for the final **2 quarters**; Q4'15, saw just **154 deals**, the lowest quarterly total since **Q3'14**.



## Mega-rounds spread through fintech:



In 2015 alone, the number of **\$50M+** rounds to venture-backed fintech deals jumped

**past 60**, when between **2011 to 2013**, there were fewer than 15 in aggregate.

## Corporates active in 1 of every 4 fintech deals:



Corporates have participated in **25%** or more of all fintech deals for the past **3 quarters** straight.

## North America Fintech

### New high-water mark:



mega-rounds pushed US fintech funding to **\$7.39B** across **351 deals** in 2015. On a year-over-year basis, 2015 saw a **72%** rise from 2014's **fintech** funding total.

### US fintech deal activity falls for second straight quarter:



US fintech deals hit a **five-quarter low** in Q4'15, as funding fell below **\$1B**.

### Mid-stage fintech deals heat up:



Series B deal share to US fintech companies hit a **five-quarter high**

in Q4'15. Series A deals took 1/4th or more of all US fintech deals for the second straight quarter.

### Late-stage deal sizes come back to earth:

Median late-stage **fintech** deal sizes rose to **\$75M** in Q3'15. But Q4'15 saw median late-stage deal sizes fall back to **\$38M**.



## Europe Fintech

### European fintech funding deals rise in 2015:

VC-backed fintech companies in Europe raised **\$1.48B** in funding across **125 deals** in 2015.



### Early-stage fintech deal sizes fall in second half:

Early-stage median deal size in Europe fell below **\$2M** in Q3'15 and Q4'15.



### UK dominates Germany fintech funding in 2015:

UK fintech funding outpaced that of Germany by **398%** in 2015.

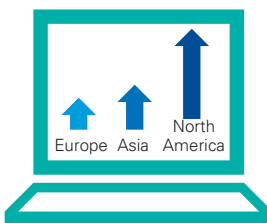


### Corporates less prominent in Europe fintech deals:



Corporates have participated in less than **15%** of VC-backed fintech deals in 4 of the past 5 quarters.

### Lack of Europe fintech mega-rounds:



2015 saw Asia garner **113%** more **\$50M+** fintech deals than in Europe and **375%** more mega-rounds in North America.

## Asia Fintech

### Asia fintech funding quadruples 2014 total:

In 2015, funding to VC-backed fintech companies in Asia exploded to hit **\$4.52B** across **130 deals**.



### Q4'15 falls back after \$1B+ quarters:

After hitting **\$1B+** in both Q2'15 and Q3'15, Asian **fintech** funding fell **\$1B** in Q4'15 from the quarter prior.



### Fintech mega-rounds spike in Asia:

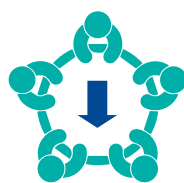
After taking fewer than **10 \$50M+** deals between 2011 and 2014, Asia saw **17 \$50M+** deals to venture-backed fintech startups in 2015.



### Corporates extend reach in Asia fintech:

Corporates participated in **40%** of all financing deals to Asian VC-backed **fintech** companies in Q4'15 and nearly half in Q3'15.

### Asia fintech seed deal share falls:



In Q4'15 Series B and Series C stages took **29%** of all activity and fintech seed deal share fell to a five-quarter low of **16%**.

#FINTECH

Source: The Pulse of Fintech, 2015 in Review, Global Analysis of Fintech Venture Funding, KPMG International and CB Insights (data provided by CB Insights) March 9th, 2016.

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