

Funding to VC-backed fintech companies hits \$4.9B across 218 deals in Q1'16:



Total fintech funding including activity by angels, PE firms, mutual funds and hedge funds hit **\$5.7B** across

468 deals.



VC-backed deal activity rebounds from Q4'15 drop to hit new high:

Q1'16 saw deals propel to new highs and rise

22% on a quarter-over-quarter basis.



Asian mega-rounds buoy funding growth:

The number of **\$50M+** fintech financings in **Q1'16**

grew by fewer than 5 on a quarterly basis but accounted

for over **54%** of dollars invested.



Median early-stage deal size in fintech hits 5-quarter high:

Median early-stage (Seed — Series A) deal size among all VC-backed fintech companies was

\$2.7M in **Q1'16**, **29%** higher than **Q4'15**.



North America Fintech

Deals on pace for new record:

VC-backed fintech deal activity in **2016** is on track to

500 top deals at the current pace.



Corporates participate in over 1 of every 4 North American deals:

Corporate participation in deals to **North American** fintech companies rose and hit a 5-quarter high at

26%



Seed-stage fintech deal share falls for 2nd straight quarter:

In **Q1'16**, seed activity took

28% of all fintech deals in North America, a 5-quarter low.



Late-stage deal sizes drop to 5-quarter low:

A lack of mega-rounds helped push the median late-stage fintech deal size in North America to a **5-quarter** low of

\$19.5M



Europe Fintech

European fintech deals rise to 5-quarter high:

Fintech deal activity in Europe rose

27% on a quarterly basis.



Seed deal share in Europe falls after rising for 3 straight quarters:

Seed deal share in European fintech companies fell to

30% in **Q1'16** after hitting **46%** in **Q4'15**.



Funding to VC-backed UK fintech startups drops:

Funding to VC-backed UK fintech companies

41% fell on a quarterly basis, but still outpaced that of Germany.



Corporates get more active in Europe fintech deals:

Corporate participation in European fintech deals rose to

21% in **Q1'16**.



No European fintech mega-rounds in Q1'16:

There were no **\$50M+** financing rounds to VC-backed fintech companies registered in the **first 3 months** of 2016 in Europe.



Asia Fintech

Asian fintech funding rebounds from Q4'15 drop:

Q1'16 funding to VC-backed fintech companies in Asia jumped to

\$2.6B from **\$0.5B** the quarter prior.



Asian fintech deals on pace to match 2015 high:

At the current run rate, **Q1'16** deal activity on pace to match 2015's high of **144** deals.



Asian fintech seed deal share rises as Series A falls:

Series A activity took fewer than

1/5th of all fintech deals in **Q1'16**, a 5-quarter low.



Corporates pursue fewer deals in Asian fintech in Q1'16:

Corporate participation in Asian VC-backed fintech deals fell to

31% in **Q1'16**, a 5-quarter low.

