

Funding to VC-backed fintech companies hit \$2.5B across

195 deals in Q2'16:

Total fintech funding activity hit

\$9.4B across **374 deals**.



VC-backed deal activity declines:

Deals dropped

12% in **Q2'16** on a quarterly basis, down



11%
from the same quarter last year.

North America sees bigger fintech deal drop than Europe or Asia:

While Asia and Europe saw VC-backed fintech deal levels remain nearly level in **Q2'15**, North America dropped over



26%
on a quarterly basis.

Corporate participation in fintech deals rises to nearly 1/3rd of all deals:

Corporate participation in VC-backed fintech deals rose to a 5-quarter high and surpassed the

30%
mark in **Q2'16**.



North America

Deals hit 5-quarter low:

In North America, deal activity fell to a 5-quarter low in

Q2'16, falling from



130 deals
in **Q1'16** to **97** deals in **Q2'16**.

Corporate participation in North American fintech deals hits quarterly high:

Corporates played a larger role in deals to North American VC-backed fintech companies in **Q2'16**, participating in

30% of all fintech deal activity.



California tops NY for Q2'16 fintech funding:



After New York overtook California for fintech funding in **Q1'16**, California topped NY for fintech funding by

200%
in **Q2'16**.

Early-stage deal sizes in North America hit 5-quarter high:



Median early-stage fintech deals were

\$4.6M
in **Q2'16**.

Europe



European fintech deals on pace for new high in 2016:

VC-backed fintech companies in Europe raised **\$369M** in funding across **43 deals** in **Q2'16**.

At the current run rate, deals are on pace to top 2015's total by **13%**.



Germany outpaces UK for fintech funding in Q2'16:

Germany saw more than **80%** more funding to VC-backed fintech companies than the UK did in **Q2'16**.



Corporate participation in European fintech hits 5-quarter high:

Corporate participation in the number of European fintech deals rose for the second straight quarter to

28%
in **Q2'16**.



No European fintech mega-rounds in Q2'16 (YTD):

When it came to VC-backed fintech companies, there were no **\$50M+** financing rounds registered in the first **6 months** of 2016 in Europe.



Asia

Asian fintech funding drops from Q1'16 spike:



Funding to VC-backed fintech companies in Asia fell from over **\$2.6B** in **Q1'16** to **\$772M** in **Q2'16**.

Asian fintech deals hit 5-quarter high in Q2'16:



Deal activity to VC-backed fintech companies reached a

5-quarter high in **Q2'16** with **46 deals** recorded.



Asian fintech early-stage deal share remains dominant:

Early-stage VC-backed fintech companies in Asia accounted for

61% of deal share in **Q2'16**.



Asian corporate activity rebounds in Q2'16:

Corporate participation in Asian VC-backed fintech deals rebounded to

39% in **Q2'16** from **31%** in **Q1'16**.

