Q2 2019
Key Themes in Marketplace Enablers

COMCAP
Where commerce meets capital

An introduction to ComCap

- ComCap is a premier boutique investment bank focused on the intersection of commerce and capital, with key focus on B2B SaaS, B2C ecommerce, payments, mobile commerce, marketplaces and B2B services for retail technologies (IT and marketing services, in-store, fulfillment, logistics, call center, analytics, personalization)

- Headquartered in San Francisco with European coverage from London & Moscow, and LATAM coverage from Sao Paolo. Our firm works with mid-cap public companies on buyside initiatives and public and private growth companies on financing and strategic M&A

- In addition to being the only boutique focused on disruptive commerce models, we differentiate by:

  – Bringing bulge bracket techniques to emerging models;

  – A strong and uncommon buyside/strategy practice;

  – Deep understanding of industry drivers and synergy analyses;

  – Deep relationships across the sector; and

  – Worldwide coverage with closed transactions in the United States, Japan, China, the ASEAN region, Western and Eastern Europe and Latin America

- Our global ComCap team:

Aron Bohlig
Managing Partner
M: +1 415-235-8270
E: aron@comcapllc.com

Steve Terry
Managing Director
M: +1 415-971-3794
E: steve@comcapllc.com

Fermin Caro
Director
M: +1 650-743-7825
E: fermin@comcapllc.com

Steve Goetz
Advisor
M: +1 415-336-1684
E: sgoetz@comcapllc.com

Carlos Gonzalez
Director
M: +7 915-413-1911
E: carlos@comcapllc.com

Collin Rice
Senior Associate
M: +1 612-578-7512
E: collin@comcapllc.com

Peter Creech
Associate
M: +1 508-685-1620
E: peter@comcapllc.com

Daniel Radomysler
Associate
M: +55 11 99658-7977
E: daniel@comcapllc.com

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ComCap holds a unique position at the global intersection of retail and technology leaders

ComCap and European tech PE firm True Global hold event at Shoptalk 2019 for retail VPs of strategy to meet selected tech leaders

Event description

- **ComCap and True Global facilitated a networking event for major retailers, retail tech leaders, and investors at Shoptalk 2019**, widely regarded as the most important retail conference of the year
  - The networking event allowed retailers to connect with trending technology companies in verticals such as AI/Analytics, fashion technology, in-store IoT, visual merchandising, and digital native vertical brands
- **Over 50 major retail strategy executives and CEOs of innovative digital retail companies** were in attendance across the United States, Europe, and Asia
  - Strategy officers from key retailers represented at the event include **Macy's, 7-11, Li & Fung, Express, and Abercrombie & Fitch**

Key participants	Name	Title	Company
	David Colletti	VP, Mergers & Acquisitions	7-ELEVEN
	Greg Fancher	SVP & Chief Information Officer	EXPRESS
	Erik Morton	SVP, Product & Strategy	CommerceHub
	Neil Tenzer	Head of Corporate Strategy	Abercrombie & Fitch
	Randy Greben	SVP, Chief Financial Officer	ANN INC.
	Jason Gowans	VP Digital, Marketing, and Enterprise Data	NORDSTROM

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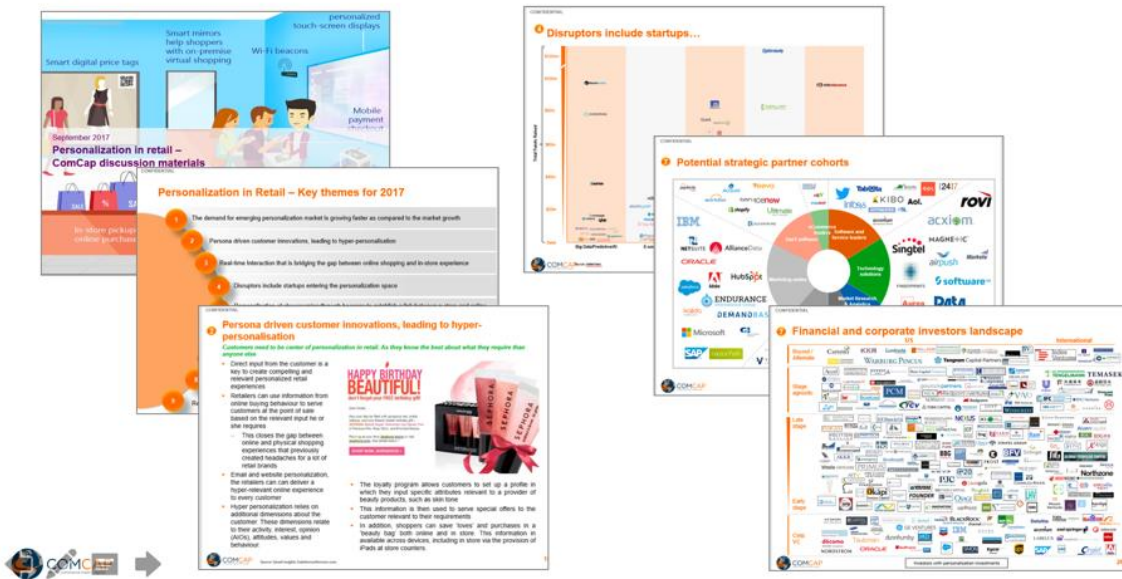*Where commerce meets capital*

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ComCap occupies a unique position in the advisory landscape

- Only boutique focused on "digital retail"
- Actively hosts forums at major industry events
- Partner of choice for major SaaS investors
- Actively publishes research educating major strategics and private equity firms about trends in the space and leaders
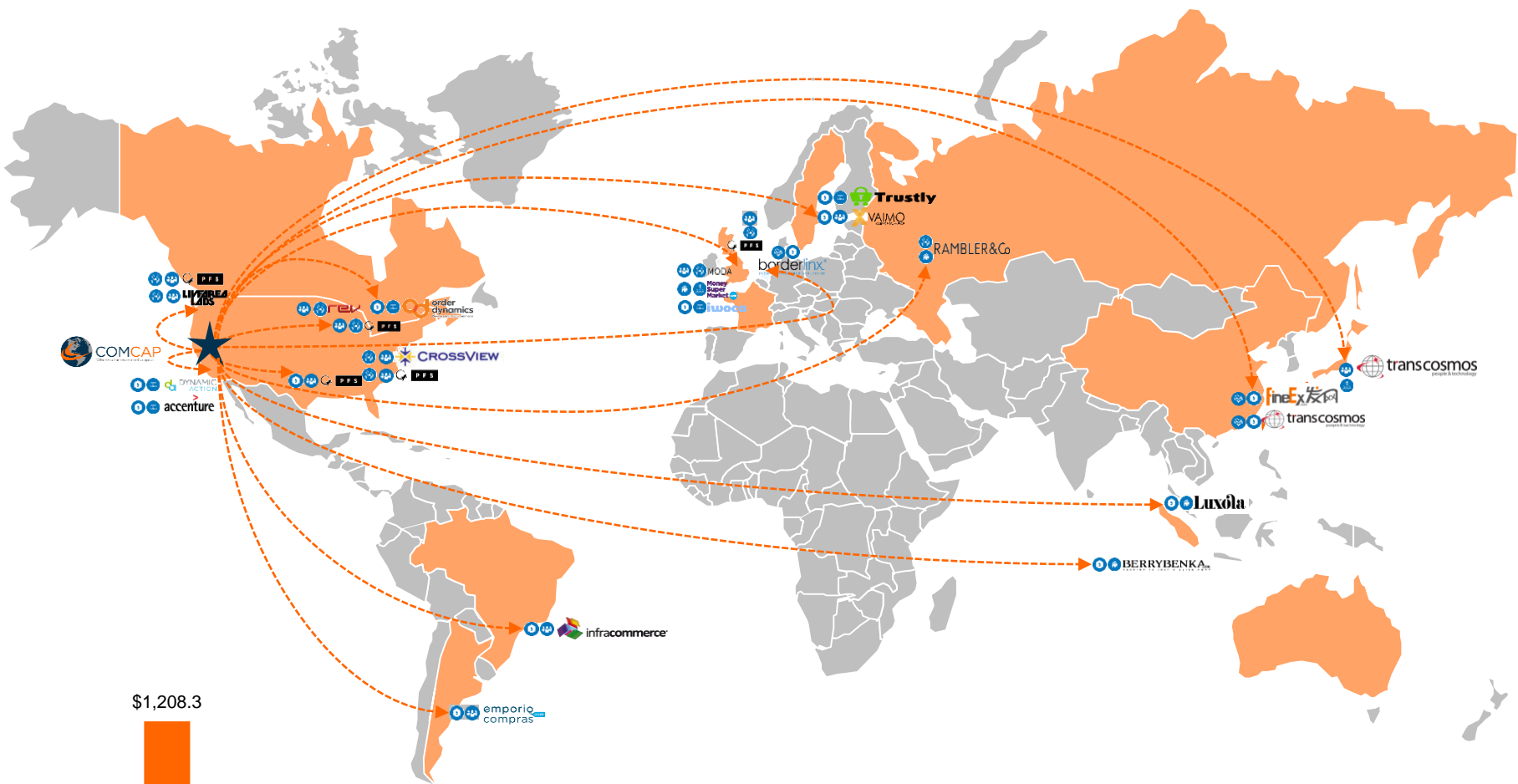- As such we have unparalleled access to key investors and buyers

ComCap – Active in 14 countries, including 8 of the top 10 global ecommerce markets

Retail ecommerce Sales Worldwide – 2017 ($US bn)[1]

Country	Sales ($US bn)
China	$1,208.3
US	$431.8
UK	$121.4
Japan	$111.3
Germany	$76.5
France	$49.7
South Korea	$46.6
Canada	$35.1
Brazil	$24.7
Australia	$22.3

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ComCap covers the leading marketplaces globally in Europe, Asia and the Americas

Overview of leading marketplaces across geographies

- ● Product Marketplaces
- ● Service Platforms
- ● Other Platforms
- ● Multiple Platforms

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ComCap's current thematic focus areas

Theme	Description	Select companies
Analytics	Disruptors in the analytics space focused on ecommerce, logistics, retail, predictive, payment, risk and marketing	Profitero, Trax image recognition, DYNAMIC ACTION, bloomreach
AR/VR and content creation	Emerging technologies with retail applications that allow retailers to offer a differentiated customer experience and build brand awareness and loyalty	AUGMENT, LOOKLET, PERFECT
Beauty, health and wellness	The universe of beauty companies, including product manufacturers, retailers, disruptors and new entrants	REVLON, DAV/DK/ND beleza NA WEB
Digitally Native Vertical Brands (DNVBs)	D2C digitally native brands covering clothing, accessories, personal care, home and kitchen, furniture, and other consumer-focused products	BONOBOS, TAYLOR STITCH, PARACHUTE, chubbies
Digital Retail SaaS	Emerging and disruptive SaaS businesses in the digital retail sector	bitwin, one door, volusion order dynamics, HANDSHAKE, wynd, WebLinc
Fintech	Retail and commerce-related disruptors in the fintech universe. Current focus areas include payments, fraud prevention, and retail POS	ASEMBLY, zuora, ripple, stripe, YAPSTONE, Paysafe, yoyo
Geospatial Analytics	Disruptive technologies in consumer location data and analytics that retailers and brands can use for 1:1 marketing and insights	PlaceIQ, C-IQ, mogean, Shelfbucks, GRAVY
Marketing suites	Emerging platforms in the digital marketing space	yottaa, AGILONE, avocet, emarsys
Mobile	Focused on mobile solution providers optimizing the mobile experience from desktop-to-mobile website conversions, targeted mobile marketing, to simplifying the mobile checkout experience	URBAN AIRSHIP, mad mobile, MOOVWEB
Outsourcing and service providers	Companies that provide outsourcing and end-to-end ecommerce services, such as contact centers, platform, marketing, photo services, logistics, warehousing etc.	PFS, transcosmos, infracommerce, ösom
Personalization	Emerging players in the ecommerce personalization space	evergage, CERTONA, segmint, TRUE FIT
Robotics	Robotics companies integrating into various aspects of supply chain and retail	fetch robotics, bossanova
Logistics	Emerging platforms and providers innovating and optimizing the many facets of the supply chain ecosystem	INTELLIGENT AUDIT, Happy Returns, Deliverr, GOGOVAN, BRINGG
System Integrators	Systems Integrators with a particular focus on those standing up and supporting Demandware, Magento, and other ecommerce platforms	VAIMO, astound CORRA, smartosc

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ComCap's thematic landscape

Major Players

Tech Companies

Retailers/Brands

Amount Raised

>$200m
$100m
$75m
$50m
$25m
0

AI/Analytics | B2C | ecommerce SaaS | Fintech | Logistics | Marketing | Mobile | Personalization | Retail In-store technology

Source: Capital IQ, Pitchbook

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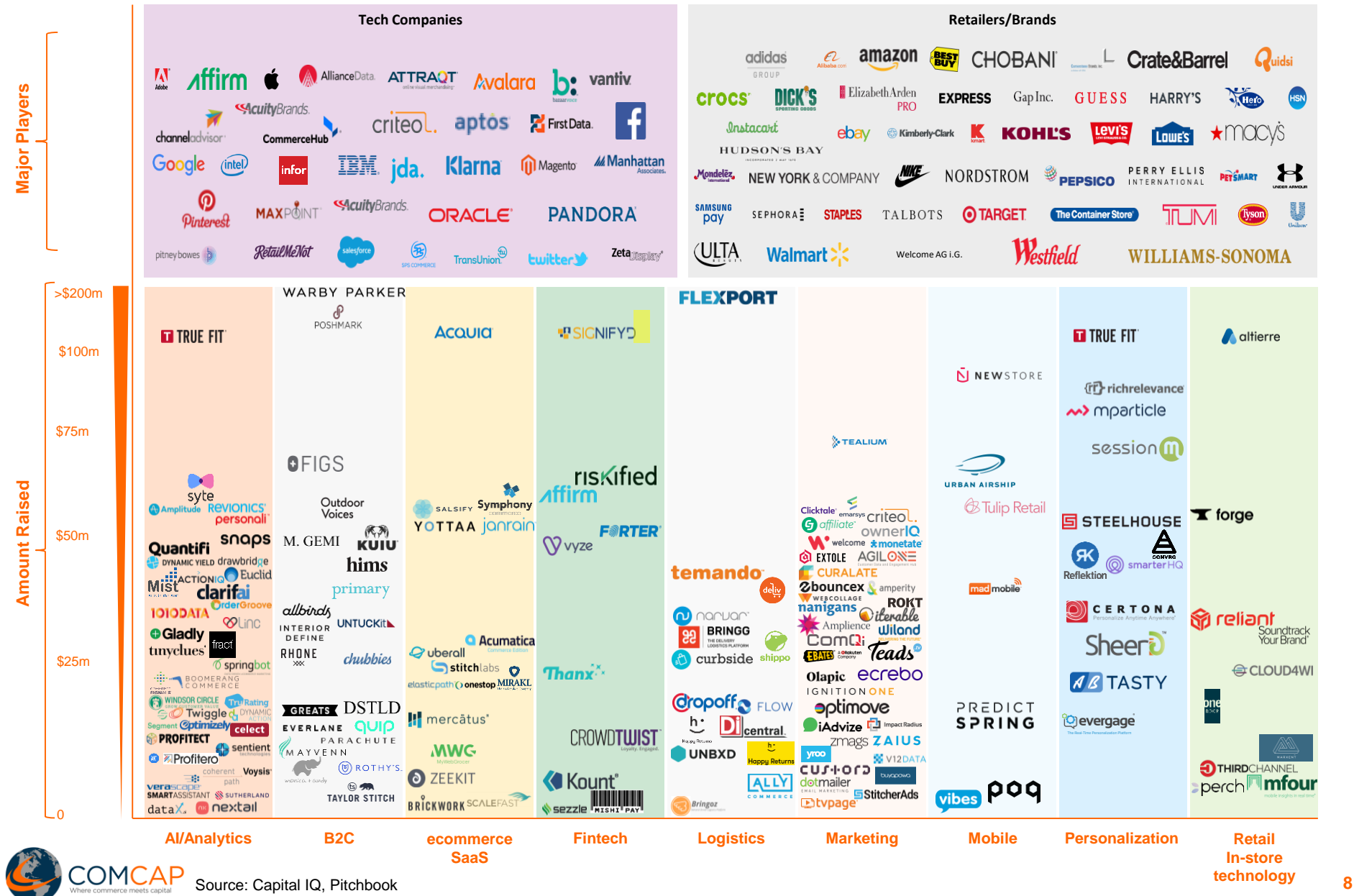
Key Industry Trends

Global retail market overview: ecommerce sales are expected to reach ~$4.1tn by 2020

Retail and ecommerce sales market trends

- The global retail market is expected to reach $27.7 tn by 2020 from $24.9 tn in 2018
- In 2018, retail ecommerce sales were estimated to be $2.8tn, ~11% of total retail sales
    - ecommerce revenues are projected to grow to $4.1tn in 2020E or 15% of total retail sales by 2020
- Global marketplace sales were estimated to be ~65% of total ecommerce sales, or ~7.5% of total retail sales in 2018
    - Marketplace sales are expected to reach 9.8% by 2020E, outpacing overall ecommerce sales growth by 2x
- The world's online marketplaces sold more merchandise than all stand-alone retail web sites combined according to Internet Retailer's 2019 Top 100 Online Marketplaces Database
- Global marketplaces such as Amazon, eBay, and Alibaba are expected to account for almost 40% of the global online retail market within the next five years

Retail vs ecommerce market size ($tn)

Source: digitalcommerce360, Internet Retailer, Ecommerce Foundation
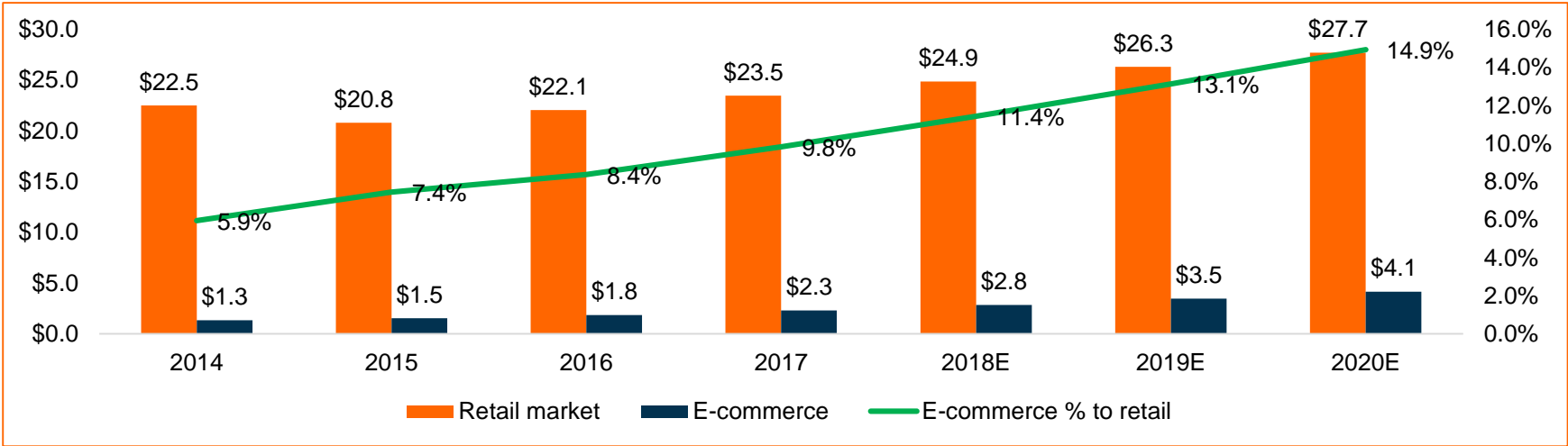
Marketplaces are an efficient way to reach consumers across the globe

Where are the top marketplaces located?

- The below graphic illustrates the geographical concentration of the top 100 marketplaces
  - North America has the highest number of marketplaces with 61 large marketplaces, while, Asia and Europe have 17 and 14 respectively
- The cross-border online marketplaces continues to increase in significance, benefiting consumers by giving them easy access to a wide variety of products

North America: 61

Europe:14

Asia: 17

Middle East/
Africa: 3

Latin America: 5
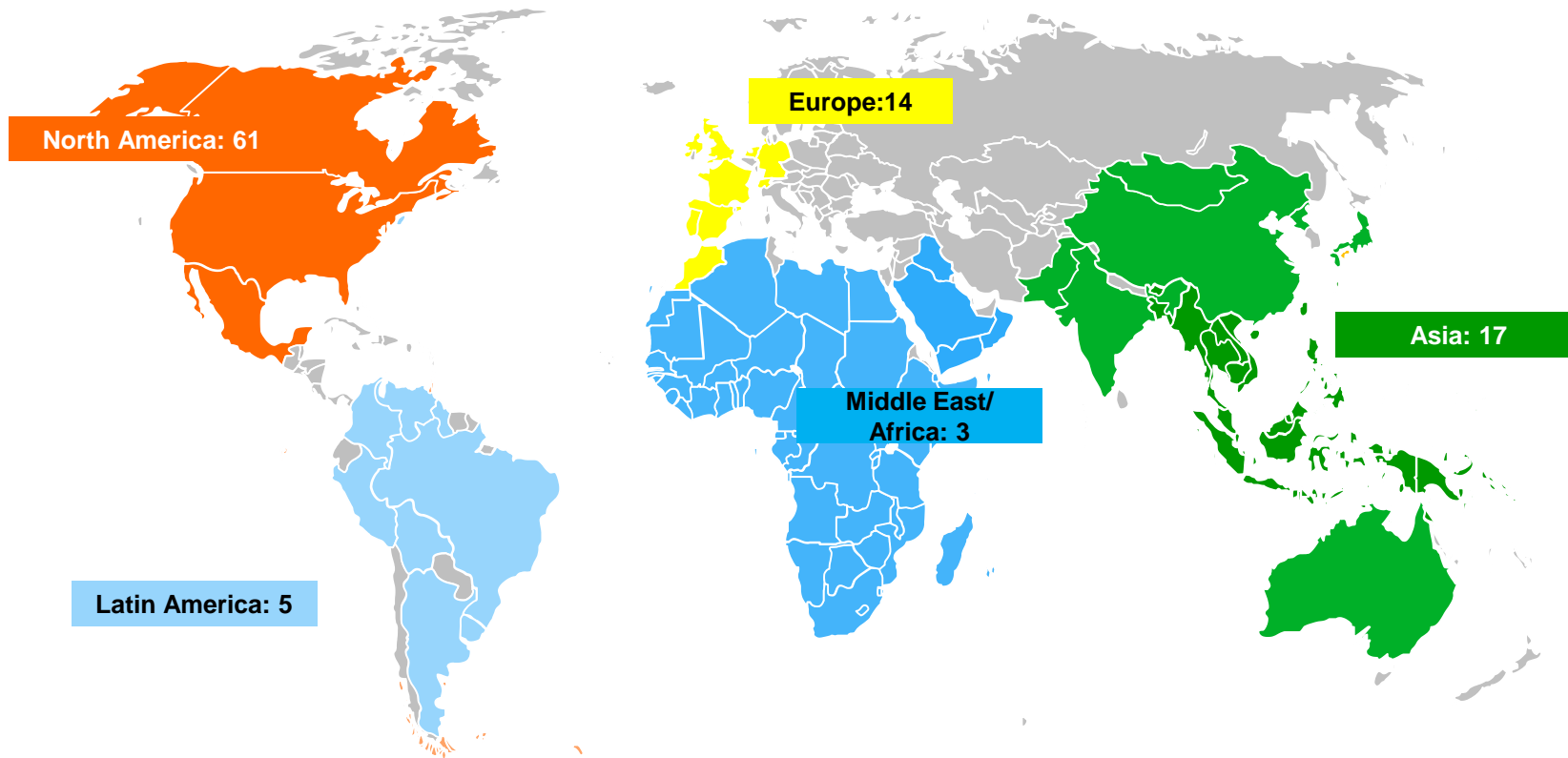
China and the US are leaders in the marketplace space

Largest global marketplaces

Rank	Marketplace	GMV in $ bn	Country
1	Taobao	$515	China
2	Tmall	$432	China
3	Amazon	$344	United States
4	JD.com	$259	China
5	Ebay	$96	United States

Largest US marketplaces

Rank	Marketplace	GMV in $ bn
1	Amazon	$344
2	Ebay	$96
3	Walmart	$36
4	Wish	$8
5	Houzz	$8

Online marketplaces by 2018 GMV

- $50B - $100B+: 5
- $1B - $50B: 28
- $250M - $1B: 24
- $40M - $250M: 25
- $1M - $40M: 18
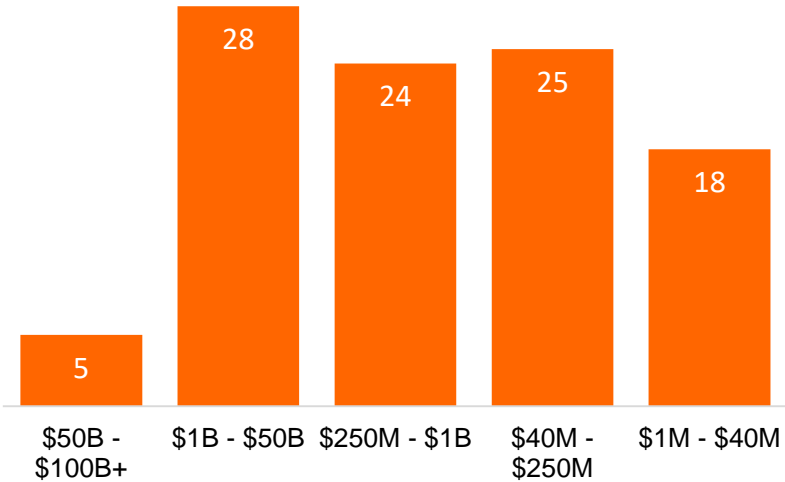
Global marketplace GMV market share in 2018 ($1.86 Tn)

- Taobao: 27.7%
- Tmall: 23.2%
- Amazon: 18.5%
- JD.com: 13.9%
- Ebay: 5.2%
- Other: 11.5%

Source: digitalcommerce360

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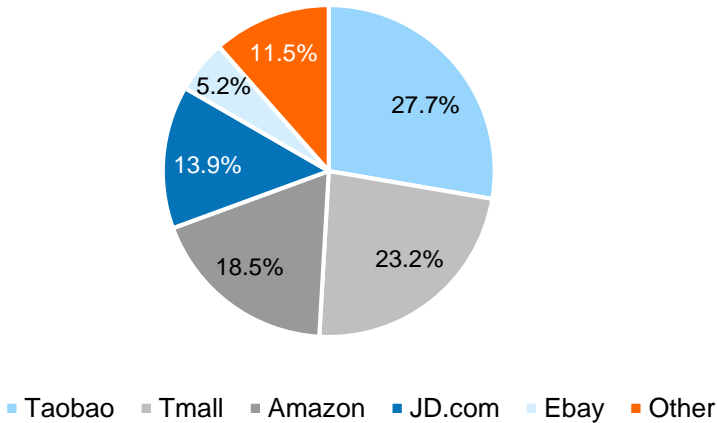
The largest 100 marketplaces are driving online worldwide sales growth

- 39 of the 100 top marketplaces launched between 2010 and 2015
- Online marketplaces have disrupted on-premise retail by trimming traditionally high middlemen fee structures
- These marketplaces include legacy retailers that have recently allowed other merchants to sell on their platforms

Marketplace Sales
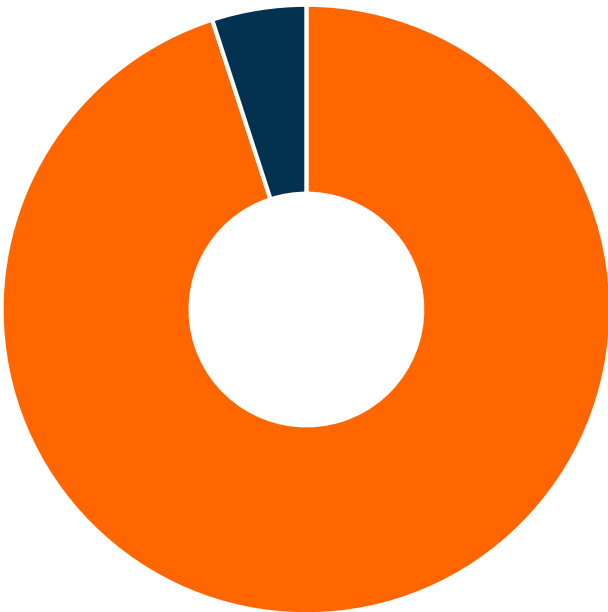
Top 100 marketplaces account for >95% of global marketplace sales

Global Online Retail (2018)

Marketplace sales accounted for 65% of global online retail

- *Investments in high-growth marketplaces continue to garner interest worldwide*

- *Emerging markets are driving growth opportunities, allowing for companies with a wide range of products and services to capture a large share of underserved, fragmented markets*

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Case study: Mirakl allows traditional retailers to expand their catalogue and increase sales

250 million

Customer visits

200%+

Product catalogue increase in 12 months

#1

Baby category sales in Canada

2x

Increase in product catalogue

10%

Increase in incremental sales in 12 months

Over 15

New sub-categories offered

Emerging trends in sales enablement

1 | **Market size**

2 | **Performance / advantages**

3 | **Strategic decision criteria**

Market size

- Sales enablement technology is currently a $780M market, and has potential to grow to $5 Bn by 2021
- Key drivers of growth:
    - 7.2% of retailers currently using standalone sales enablement platforms
    - 59.2% of companies currently using a dedicated sales enablement function with an incremental 8.5% of companies having plans to create one in the coming year

Performance / advantages

- Over 75% of companies using sales enablement tools indicated that sales had increased over the past 12 months
- A sales enablement charter is linked to a 27.6% increase in quota attainment and improved performance
- 59.9% of retailers plan to increase their sales force over the next 12 months

Strategic decision criteria

- Key strategic considerations for clients to implement sales enablement tools are:
    - All-in-one capabilities vs. best-in-class offerings
    - DIY vs. buying or renting tools
    - In-source vs. outsource
    - Global standardization vs regional specialty
- Achieving target sales
    - Only 30% of sales enablement efforts meet expectations, causing companies to require more advanced analytics tools to set more realistic targets

The marketplace enablement landscape

Ecommerce Performance Analytics

Panel Data

Digital Shelf Monitoring

Marketplace Listing Management

Product Information Management (PIM)

Sector	Description
Ecommerce Performance Analytics (EPA)	▪ Performance analytics platform that integrates various performance-measured matrices, benchmarks, and technology for brands
Panel Data Analytics (PDA)	▪ Processes expert panel data, market research questionnaires, digital surveys, and ecommerce sites
Digital Shelf Monitoring (DSM)	▪ Digital monitoring of content, rankings, ratings, reviews, inventory, pricing and promotions, and system feed
Marketplace Listing Management (MIM)	▪ Omnichannel software that lists multiple products across a variety of channels
Product Information Management (PIM)	▪ Centralized PIM, master data management suite, digital asset management, and product and customer data in a single view

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Source: ComCap, Company data

The marketplace enablement funding landscape

Total Capital Raised (y-axis): $2000m+, $100m, $75m, $50m, $25m, $15m, $5m, $0m, Unknown Funding amount

Categories (x-axis): Ecommerce Performance Analytics, Panel Data Analytics, Digital Shelf Monitoring, Marketplace Listing Management, Product Information Management

Source: PitchBook, Capital IQ, CrunchBase, IRi LBO $2Bn deal, Magnitude Software:$279M

Denotes M&A   Denotes IPO

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Key Players: Ecommerce Performance Analytics Providers

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Ecommerce Performance Analytics Providers

Company	Profile	Capabilities
EDGE BY ASCENTIAL	**Edge** ecommerce performance analytics for brands and retailers **Founded:** 2018 (EDGE) www.ascentialedge.com/ **Employees:** 400 **HQ:** London, 10 offices in NA, Europe and Asia **Funds Raised**: NA, Acquired by Ascential **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** Duncan Painter (Ascential)	**Services offered:** - Edge by Ascential™ delivers actionable sales-driving data, insights and advisory solutions for global brands and retailers. - The company's clients are provided with a holistic view of their sales compared to the wider market and a clear plan of action to increase their performance. **Key Facts:** - Integrated various product names such as BrandView, Clavis Insight, One Click Retail and PlanetRetail RNG into Edge by Ascential in Oct 2018. - Edge by Ascential solutions for brands and retailers include: - Weekly, daily and real-time digital shelf performance metrics. - Monitoring of price movements, promotions, availability, product content changes and new product listings. - SKU- and category-level online sales and share; traffic, search optimization and conversion measurements. - In-depth price and promotion analytics and benchmarking; competitive and market intelligence; Omni-channel go-to-market and market optimization strategies.
Profitero	**Profitero** Provides ecommerce performance and Digital shelf monitoring analytics **Founded:** 2010 hwww.profitero.com/ **Employees:** 190 **HQ:** Dublin, Ireland **Funds Raised**: $9m **Latest Financing Round:** $8m **Latest Financing Valuation:** N/A **CEO:** Volodymyr Pigrukh	**Services offered:** - With Profitero analytics, brands can measure their digital shelf performance across 8,000+ retailer sites and mobile apps in 50 countries and correlate with share performance. - Expansion in new verticals such as electronics, apparel and outdoors keeping traction with global FMCG manufacturers. - Launched Amazon Traffic & Conversion Analytics, making first solution provider to integrate daily traffic and conversion metrics, Amazon sales and share, and digital shelf analytics in one easy integrated platform. **Key facts:** - Reported a 113% YoY increase in annual-recurring revenue (ARR) in 1H2018. - The renewal rate for existing brand customers was 90% in 1H2018. - Expanding its Amazon Analytics coverage to Australia market. - Key clients include Adidas, Affinity, Alcon, Bayer, Brother, Califia, Edgewell, Evenflo, General Mills, Jack Links, LAVAZZA, Maxxium.

Ecommerce Performance Analytics Providers

Company	Profile	Capabilities
SALSIFY	**Salsify** Salsify empowers brands to deliver compelling shopping experiences for consumers, across every digital touchpoint **Founded:** 2012 www.salsify.com **Employees:** 346 **HQ:** Boston, Massachusetts **Funds Raised**: $97.6m **Latest Financing Round:** $43m, Series D **Latest Financing Valuation:** N/A **CEO:** Jason Purcell	**Services offered:** ▪ Salsify empowers brands to deliver compelling shopping experiences for consumers, across every digital touchpoint. ▪ Salsify solution combines content management, syndication & publishing, and digital shelf analytics into a single, unified platform **Key Facts:** ▪ Its product experience management platform (PXM) combines the power of PIM and DAM capabilities, the industry's broadest commerce ecosystem, and actionable insights to orchestrate compelling product experiences through every digital touchpoint. ▪ The world's biggest brands including Coca-Cola, Tyson, Bosch, GSK, Rawlings, and Fruit of the Loom, Rawlings, asics are using Salsify every day to stand out on the digital shelf. ▪ Salsify is deployed in over 80 countries around the world and has offices in Boston, Lisbon, and Austin.
WHYTESPYDER	**WhyteSpyder** Provider of omnichannel service to retailer and brands **Founded:** NA www.whytespyder.com **Employees:** 24 **HQ:** Fayetteville, AR **Funds Raised**: N/A **Latest Financing Round:** N/A **Latest Financing Valuation:** N/A **CEO:** Eric Howerton	**Services offered:** ▪ WhyteSpyder helps Walmart and Sam's Club manufacturers setup, manage, and optimize product data and content on Walmart.com and Samsclub.com. ▪ WhyteSpyder is tagged as one of the enrichment providers with deep content expertise in apparel, auto, lawn and garden categories. **Key facts:** ▪ WhyteSpyder was selected as one of the 12 connected content partners by Walmart in 2018 as the retailer reduced the number of options suppliers. ▪ In the early 2019, WhyteSpyder partnered with Crossmark on digital merchandising offering. The alliance allows them to provide a one-stop omnichannel shop to serve all brands' and retailer needs. ▪ In 2018, the company has launched SKU Ninja, a new software tool to help suppliers manage, monitor and publish content to improve and scale ecommerce sales through human-based services.

Ecommerce Performance Analytics Providers

Company	Profile	Capabilities
Syndigo right data. right now.	**Syndigo** Formerly Gladson, Syndigo ecommerce product are linked to Analytics, Compliance, Human Resources, Legal, Machine Learning, Predictive Analytics, SaaS, Social Network **Founded:** 1971, rebranded in 2018 www.syndigo.com **Employees:** 251 **HQ:** Chicago, Illinois **Funds Raised**: NA **Latest Financing Round:** N/A **Latest Financing Valuation:** N/A **CEO:** Paul Salay	**Services offered:** ▪ The company's platform enables clients to increase in-store and ecommerce sales using detailed product information, and optimize in-store and shelf layouts to facilitate path to purchase. **Key Facts:** ▪ Gladson rebranded as Syndigo, consolidating the 2018 acquisitions of Edgenet, ItemMaster and Webcollage to offer a suite of product content and data solutions. ▪ Serves broader brand, distributor, and retailer ecosystem in the industrial, retail foodservice, grocery, consumer goods, hardlines and automotive sectors. ▪ Current product life-cycle function includes: ▪ Building and acquiring additional data, verified product information solutions, store optimization services for in-store layouts and shelf merchandising. ▪ Syndication of data to GS1 global standards via GDSN and publishing of enhanced product content integrated into retail sites globally. ▪ Interactive tools to allow restaurant and foodservice brands to organize and share nutrition data with their customers.
Stackline	**Stackline** Stackline is a retail intelligence and software company founded by a group of Amazon veterans. **Founded:** 2014 www.stackline.com/ **Employees:** 59 **HQ:** Seattle, Washington **Funds Raised**: $9m **Latest Financing Round:** $8m **Latest Financing Valuation:** N/A **CEO:** Michael Lagoni	**Services offered:** ▪ Stackline is a leading provider of retail technology and services. ▪ Its retail technology activates data, automates execution, and optimizes ecommerce marketing performance for hundreds of the world's largest companies. **Key facts:** ▪ Stackline augments human intelligence by combining software and data science. ▪ Their patent-pending computational platform helps companies unleash analytics on rich data to turn consumer insights into commercial excellence. ▪ Stackline helped its customers earn over $30 billion in 2018. ▪ Its solutions is used by leading brands such as Lenovo, Google, Canon, Uniliver, Sony.

Ecommerce Performance Analytics Providers

Company	Profile	Capabilities
kissmetrics	**KISSmetrics** ecommerce performance analytics for brands and retailers **Founded:** 2008 www.kissmetrics.com **Employees:** 43 **HQ:** San Francisco, California **Funds Raised**: $16.4m **Latest Financing Round:** $3m (Series B) **Latest Financing Valuation:** N/A **CEO:** Brian Kelly	**Services offered:** ▪ Kissmetrics offers behavioural analytics, segmentation, and email campaign automation all in one place. ▪ Provides data-driven insights with powerful segmentation and precision targeting to consumer purchasing journeys. ▪ Its product can create dynamic, automated Facebook Audiences with a single click and provides channel alerts when someone joins a group **Key Facts:** ▪ Lucidchart, unbounce, MercyCorps, SenGrid are some of the brands using KISSmetrics solutions. ▪ Kissmetrics had acquired SourceNinja, a solutions provider to discover software, identify vulnerabilities, and decrease patch time, in 2013.

Metrilo	**Metrilo**
	Metrilo is a marketing platform that solves marketing problems for ecommerce stores
	Founded: 2014
	www.metrilo.com/
	Employees: 27
	HQ: Sofia, Bulgaria
	Funds Raised: $1.1m
	Latest Financing Round: $600k (2017)
	Latest Financing Valuation: N/A
	CEO: Murry Ivanoff
		Services offered:
		▪ Provides customer analytics and intelligent marketing tools for online stores.
		▪ Metrilo is available on Shopify app store and allows user to integrate their Shopify store with one click.
		▪ Metrilo plugin connects WooCommerce store through open-source ecommerce plugin with the Metrilo platform in less than 5 minutes. It is a self-standing platform that tracks data in real time, give accurate reports quickly without slowing down website.
		Key facts:
		▪ The company claims to have helped its customers generated $100m of additional sales using its email automation and segmentation tools.
		▪ Metrilo makes use of customer base for higher retention. Its email marketing tool does more than basic functions such as:
		  ▪ integrated data and email for building relationships with customers
		  ▪ customer lifecycle monitoring and loyalty analysis
		  ▪ segmentations and emails for personalized communication
		  ▪ tailored engagement on autopilot, automated feedback gathering and recovering lost sales

Ecommerce Performance Analytics Providers

Company	Profile	Capabilities
CLAVIS INSIGHT	**Clavis Insight** Formerly Clavis Technologies, got acquired and integrated into Edge by Ascential **Founded:** 2007 www.ascentialedge.com/ **Employees:** 73 **HQ:** Dublin, Ireland **Funds Raised**: $35.7 **Latest Financing Round:** $8.3m **Latest Financing Valuation:** N/A **CEO:** Duncan Painter (Ascential)	**Services offered:** ▪ Clavis Technologies provides end-to-end workflow consultancy and support it with the company's software, services and solutions. ▪ Clavis ecommerce Insight is used to be the provider of online store analytics. **Key Facts:** ▪ Ascential integrated various product names such as BrandView, Clavis Insight, One Click Retail and PlanetRetail RNG into Edge by Ascential in Oct 2018. ▪ The solution analyze everything that a consumer can see in an online retailer stores. ▪ It identifies the actions brand owners and manufacturers need to take to drive profitable ecommerce growth, protect their brands and beat the competition online. ▪ The majority of the world's leading Consumer Packaged Goods (CPG) companies including Unilever, Procter & Gamble, and Nestlé use Clavis Insight for online store analytics.
Cloud.IQ	**cloud.IQ** AI and machine learning based automated conversion rate optimisation platform for ecommerce businesses **Founded:** 2012 www.cloud-iq.com **Employees:** 128 **HQ:** London, England, UK **Funds Raised**: $18.5m **Latest Financing Round:** ~$4.9m **Latest Financing Valuation:** N/A **CEO:** James Critchley	**Services offered:** ▪ cloud.IQ is an artificial intelligence and machine learning based automated conversion rate optimisation platform for ecommerce businesses. ▪ Powered by real-time data and analytics, the cloud.IQ technology works to optimise the customer journey without requiring any website changes, significantly growing online revenue. **Key facts:** ▪ Partnered with tech leaders: Google and PayPal for scale. ▪ Received $4m in funding from PayPal Holdings, Inc., Juno Capital LLP, Finance Wales plc, Nauta Capital in 2017. ▪ It has offices in London, Silicon Valley, Sydney, Madrid and Cardiff. ▪ cloud.IQ is serving global clients including Allianz, Boots, Bose, EE, Hearst Magazines, Samsung, TUI etc. ▪ The company's name appeared in the Deloitte UK Technology Fast 50 2018 growing technology companies in the UK (ranked 32) with having a three year sales growth rate of 945%.

Ecommerce Performance Analytics Providers

Company	Profile	Capabilities
Numerator	**Channel IQ** Acquired by Market Track, then integrated with Numerator platform and later owned by Vista Equity partners **Founded:** 2018 www.markettrack.com/ **Employees:** 9 **HQ:** Chicago, Illinois **Funds Raised**: $12.5m (Channel IQ) **Latest Financing Round:** M&A by MarketTrack **Latest Financing Valuation:** N/A **CEO:** Jared Schrieber (Co-Founder)	**Services offered:** ▪ Channel IQ is a provider of online retail intelligence, channel management and brand protection solutions to manufacturers and retailers. ▪ Channel IQ helped manufacturers track product prices in real-time, monitor for minimum advertised price (MAP) pricing policy compliance, and helps detect grey market sellers and counterfeit activity. ▪ Owned by Vista Equity Partners, Numerator (MarketTrack + InfoScout) is the only company in the marketplace to connect omnichannel purchase data (powered by the InfoScout OmniPanel) and comprehensive path data to deliver an unmatched view of the consumer shopping and purchase experience. **Key Facts:** ▪ Dealing with 2,200 clients, Numerator captures fifteen times more shopping trips annually than legacy panels. ▪ Generates over $90Bn in measured annual ad spending, trade promotions from 445 retailers and pricing for over 80 million online product listings daily.
Jirafe	**Jirafe, Inc.** Jirafe grows revenues for retailers through ecommerce-tailored analytics and data driven marketing and merchandising **Founded:** 2010 www.jirafe.com **Employees:** 6 **HQ:** New York **Funds Raised**: $9m **Latest Financing Round:** $7m **Latest Financing Valuation:** N/A **CEO:** Amit Saha, Co-founder	**Services offered:** ▪ Jirafe provides ecommerce-tailored analytics that facilitate data-driven marketing and merchandising for retailers. ▪ The company helps commerce merchants gain insight and reports into the information they need to attract, retain, and grow customer relationships. ▪ It also allows customers to grow their revenue by showing them where to optimize their merchandising and marketing. ▪ Jirafe provides intelligent alerts to online merchants to take action on issues and opportunities such as which customers are at the risk of leaving their business or low converting products. **Key facts:** ▪ Jirafe is well-funded by the top VC firms including Foundry Group, FirstMark Capital, First Round Capital, and O'Reilly Alpha Tech Ventures. ▪ PrestaShop partnered with Jirafe and integrated its ecommerce solution to tap the US market.

Ecommerce Performance Analytics Providers

Company	Profile	Capabilities
minubo	**minubo** minubo is an ecommerce IaaS that provides solutions for analytic requirements of retailers **Founded:** 2013 www.minubo.com **Employees:** 20 **HQ:** Hamburg, Germany **Funds Raised**: $3m **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** Lennard Stoever	**Services offered:** ▪ Minubo is an ecommerce Infrastructure as a service (IaaS) that provides solutions for analytic requirements of retailers. ▪ The minubo team developed a ready-to-use analytics solution that works as the central data hub for every online shop. **Key Facts:** ▪ A unified database with comprehensive possibilities of reporting and analysis based on ecommerce best practice metrics. ▪ Creates transparency in all business areas and helps retailers make better, metrics-based decisions.

.informed.co	**Informed.com**
	
	Formerly Appeagle, Informed.co is a seller of analytics platform for ecommerce merchants
	
	Founded: 2007
	
	www.informed.co
	
	Employees: 28
	
	HQ: Jersey City, New Jersey
	
	Funds Raised:NA
	
	Latest Financing Round: NA
	
	Latest Financing Valuation: N/A
	
	CEO: Koby Kasnett
		Services offered:
		▪ Informed.co is a price intelligence platform that keeps online sellers competitive with continuous automated repricing and analytics.
		
		Key facts:
		• More than 4,000 online sellers use Informed.co to achieve financial and lifestyle freedom
		• Informed.co is different from Amazon's automate pricing tool in many ways such as:
		  • Informed.co is built in profit-based min and max price feature that allows seller to set the minimum profit to make per sale in any strategy, and with that number, the software will reverse-engineer the min price for any target listings.
		  • Informed.co allows users to upload costs for each item with an excel spreadsheet and have them feed into its profit-based min and max calculations for the ease of the user.

Ecommerce Performance Analytics Providers

Company	Profile	Capabilities
QL2 information insights immediate	**QL2 Software** QL2 delivers true competitive advantage through on-demand data extraction and analysis, producing a real-time insightful data **Founded:** 2013 www.ql2.com/ **Employees:** 248 **HQ:** Baltimore, Maryland, USA **Funds Raised**: NA **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** Carl Wartzack	**Services offered:** ▪ Provide advanced real-time data capture technology and analytical tools that create business intelligence (BI) solutions. ▪ The BI solution manage the complexity of optimizing and managing pricing, revenue and other competitive data points on a real-time basis. ▪ QL2 solutions harvest and analyze hundreds of billions of data points across thousands of data sources that feeds into the BI. ▪ Data flows from fares and rates across the entire travel and hospitality market, sales and promotions across the retail and automotive verticals, rates and trends across the finance and energy industries, and any other data need regardless of market or vertical. **Key Facts:** ▪ Serve global customers across the travel, retail, automotive and finance sectors. ▪ Key clients include AVIS, Expedia, RoyalCaribean, megabus.com etc. ▪ Sold QL2 Software's airlines business to Infare in 2017.
SINGLEFEED COMPARISON ENGINES MADE EASY VENDIO Simply Powerful eCommerce	**SingleFeed** Alibaba's Vendio's owned SingleFeed helps online merchants to submit, manage, and optimize product listings on sites like Google Product Search **Founded:** 2006 www.vendio.com/singlefeed.com **Employees:** 1 **HQ:** San Francisco, California **Funds Raised**: NA **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** Michael Effle (Vendio)	**Services offered:** ▪ SingleFeed is a Google product search partner that enables online merchants to submit, manage, and optimize product listings on more than 18 comparison shopping engines with multiple product details. **Key facts:** ▪ Alibaba's Vendio had acquired SingleFeed in 2011. ▪ More than 250,000 Vendio and Auctiva merchants access SingleFeed through custom integration and take advantage of preferred pricing. ▪ Vendio ecommerce enables merchants to sell inventory across multiple channels including Amazon, eBay, Etsy, Morecommerce marketplaces, Facebook, online stores and mobile devices.

Ecommerce Performance Analytics Providers

Company	Profile	Capabilities

PrestaShop	**PrestaShop**
	
	PrestaShop is an open-source ecommerce solution in French market.
	
	Founded: 2007
	
	www.prestashop.com
	
	Employees: 101
	
	HQ: Paris, Ile-de-France, France
	
	Funds Raised: $14.7
	
	Latest Financing Round: $9.3
	
	Latest Financing Valuation: N/A
	
	CEO: Alexandre Eruimy
		Services offered:
		▪ PrestaShop's ecommerce software lets brand choose theme best suited for their online store and offer 300 advanced features that can be customized to fit the needs of every online business.
		▪ Its software is downloaded over 3,500 times per day, translated into 75 languages, and is used by web agencies and developers in 209 countries.
		
		Key Facts:
		• PrestaShop has multiple partnership strategy to grow its business and stay updated with the market conditions.
		  1. Integrated its ecommerce software with Printful. Printful is the first print-on-demand company partnering with PrestaShop to add on new features.
		  2. Partnered with Fattmerchant in 2018 to provide profitable, fully integrated payment processing for ecommerce merchants.
		  3. Partnered with Trustpilot to launch a new module bringing the power of reviews to over 45,000 Spanish merchants in 2018.
		  4. Partnered with Jirafe ecommerce solution to tap the US market.
		▪ PrestaShop is the most popular integration in Europe, with a 15% market share and serves more than 250,000 stores worldwide.
		▪ PrestaShop was launched by Bruno Leveque and Igor Schlumberger in 2007 and its operations are in the Florida, USA and Paris, France.

Key Players: Panel Analytics Providers

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Panel Analytics Providers

Company	Profile	Capabilities
hitwise	**Hitwise** Connexity's Hitwise is a leader in large-scale online clickstream data collection and consumer behavioural analytics **Founded:** 1997 www.hitwise.com **Employees:** 354 **HQ:** Melbourne, Australia **Funds Raised**: $15.2m **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** Bill Glass, Connexity	**Services offered:** ▪ Hitwise delivers daily insights on online consumer behaviour to help marketers increase the effectiveness of their marketing campaigns. ▪ Hitwise gives marketers a competitive advantage by providing daily insights on how 25 million Internet users around the world interact with more than 1 million Web sites. **Key Facts:** • Initially, Experian acquired Hitwise for $240M in cash in 2007, but later sold to Connexity, a Symphony Technology Group company, in 2015. • Connexity has integrated Hitwise with its retail network touching over 100 million in-market consumers per month. • Its retail network includes retail product listings (second only to Google), voice of the customer feedback via Bizrate Insights, and programmatic audience targeting. • Hitwise has 1,500+ clients across numerous sectors, including financial services, media, travel and retail. It operates in the US, the UK, Australia, New Zealand, HK, Singapore, Canada and Brazil.
SimilarWeb	**SimilarGroup Ltd** Provides ecommerce performance and Digital shelf monitoring analytics **Founded:** 2007 www.similarweb.com **Employees:** 552 **HQ:** Tel Aviv, Israel **Funds Raised**: $112.2m **Latest Financing Round:** $47m **Latest Financing Valuation:** N/A **CEO:** Or Offer	**Services offered:** ▪ SimilarGroup Ltd. provides web services for Internet users to find and interpret online information through its product SimilarWeb. ▪ SimilarWeb offers research tools that helps users understand insights about any websites or mobile app. ▪ SimilarWeb's market intelligence solutions provide customers with insights to help them understand, track and grow their digital market share. **Key facts:** ▪ With the market intelligence solutions businesses, agencies, marketers and analysts can benchmark performance against competitors, reveal competitors online strategy, discover new opportunities, identify emerging trends and understand consumer intent and journey. ▪ SimilarWeb has thousands of customers and works with some of the largest global brands including Google, L'Oreal, AirBnb and eBay. Their team is spread across seven global offices with over 550 employees.

COMCAP Where commerce meets capital   Source: ComCap, Capital IQ, Crunchbase, Company data

Panel Analytics Providers

Company	Profile	Capabilities
jumpshot	**Jumpshot** Tracks online consumer behaviour **Founded:** 2010 www.jumpshot.com **Employees:** 400 **HQ:** San Francisco, California **Funds Raised**: $22m **Latest Financing Round:** M&A **Latest Financing Valuation:** NA **CEO:** Deren Baker	**Services offered:** ▪ Jumpshot delivers digital intelligence from within the Internet's most valuable walled gardens. ▪ The company's real-time, opt-in global panel tracks five billion actions a day across 100 million devices to deliver insights into online consumer behaviour. **Key Facts:** ▪ Jumpshot works with customers including Uniliver, Google, IBM, Condé Nast, Kantar, TripAdvisor, Moz, SEMrush, IRi, and GFK, among others. • Acquired by Avast for $22m in 2015.
Rakuten Intelligence	**Rakuten Intelligence** Formerly the e-receipt vendor called Slice Intelligence, Rakuten Intelligence is transforming ecommerce through its innovative market research products and consumer applications **Founded:** 2010 https://www.rakutenintelligence.com/ **Employees:** 88 **HQ:** San Mateo, California **Funds Raised**: NA **Latest Financing Round:** $8m **Latest Financing Valuation:** N/A **CEO:** Nick Stamos	**Services offered:** ▪ Rakuten Intelligence provides trusted data and insights on ecommerce from the its largest online-shopper panel. ▪ With a panel of more than 6 million people, Rakuten Intelligence measures the pulse of ecommerce. ▪ Rakuten Intelligence precisely measures what others have only been able to approximate. ▪ It captures the buying behaviour from online shoppers accurately. Data measurements are normalized across retailers and structured into an industry-wide taxonomy and catalogue. **Key facts:** ▪ Rakuten is in partnership with NPD and Nielsen to enrich its intelligence panel. ▪ Key client includes General Mills, The Clorox Company, Johnson, Kimberly-Clark, and Pepsico. ▪ Rakuten Intelligence was acquired by Japanese ecommerce company Rakuten Inc. in August 2014 and now operates as its subsidiary. ▪ Rakuten acquired an alternative data marketer, Aviso Partners, which specializes into the alternative data for hedge fund industry.

Panel Analytics Providers

Company	Profile	Capabilities
npd	**NPD Group, Inc.** The NPD Group provides market information and advisory services to help its users make better business decisions **Founded:** 1967 www.npd.com **Employees:** 1788 **HQ:** Port Washington, New York **Funds Raised**: NA, **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** Karyn Schoenbart	**Services offered:** ▪ The NPD Group, Inc. is an American market research company. ▪ The NPD Group offers data, industry expertise, and prescriptive analytics to help grow business. **Key Facts:** ▪ In 2017, NPD ranked as the 8th largest market research company in the world, according to the independent AMA Gold Report Top 50 report. ▪ With offices in 27 cities across the Americas, Europe, and Asia-Pacific, the company helps its clients measure, predict, and improve performance across all channels. ▪ Specializes in Apparel, Appliances, Automotive, B2B Technology, Beauty, Books, Connected Intelligence, Consumer Technology, ecommerce, Fashion Accessories, Food Consumption, Foodservice, Footwear, Home, Juvenile Products, Media Entertainment, Mobile, and other sectors.
nielsen	**Nielsen** Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers watch and buy **Founded:** 1930 www.nielsen.com **Employees:** 39781 **HQ:** New York, New York **Funds Raised**: NA **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** David Kenny	**Services offered:** ▪ Nielsen's marketing effectiveness data and metrics helps marketers optimize their multichannel marketing, sales and operations strategies. ▪ Nielsen's Watch segment provides media and advertising clients, with the total audience measurement services, for all devices on which content video, audio and text is consumed. ▪ The Buy segment offers the industry's only global view of retail performance measurement to the consumer packaged goods manufacturers and retailers. ▪ Integrate information from its Watch and Buy segments with other data sources to provide its clients with analytics that help improve performance. ▪ Nielsen's newly-launched hybrid audience measurement combines both user-centric (panel) and site-centric (tag-based) measurement to generate a comprehensive view of online behaviour. **Key facts:** ▪ Acquired Visual IQ, a leading independent provider of multi-touch attribution (MTA) modelling of advertising on digital platforms that helps improve ROI.

Panel Analytics Providers

Company	Profile	Capabilities
MARKET BEYOND	**MarketBeyond** Market Beyond uses AI to turn market intelligence into actionable insights for retailers **Founded:** 2016 https://themarketbeyond.com/ **Employees:** 17 **HQ:** Tel Aviv, Israel **Funds Raised**: $4m (2019) **Latest Financing Round:** $4m **Latest Financing Valuation:** N/A **CEO:** Yuval Yifrach	**Services offered:** - Market Beyond provides ecommerce analytics with product-level granularity for millions of Stock Keeping Unit (SKUs), based on real consumer shopping journeys across the entire e-market. - The company enables retailers and brands to take precise steps to grow their ecommerce market share. **Key Facts:** - Raised $4m and launched an AI dashboard GDPR compliant in March 2019. - Key client incudes eBay, P&G, Coca Cola, Walmart, Turner, and Keter.
KANTAR WORLDPANEL	**Kantar Worldpanel** Market research firm publishing insights on various vertical and country's data on its web platform **Founded:** 2000 www.kantarworldpanel.com **Employees:** 2755 **HQ:** Barcelona, Spain **Funds Raised**: N/A **Latest Financing Round:** $8m **Latest Financing Valuation:** N/A **CEO:** Josep Ramón Montserrat	**Services offered:** - Kantar Worldpanel is an international company dealing in consumer knowledge by Ascential™ and insights based on continuous consumer panels. **Key facts:** - Kantar is home to some of the world's leading research, data and insights brands including Kantar Millward Brown, Kantar TNS, Kantar Media and Kantar Worldpanel. - Publish Kantar periodicals on the US, UK, France, Spain, Brazil and China regions. - With a team of 3,500, covering over 60 countries, Kantar deliver high level insights in fields of FMCG, impulse products, fashion, baby, telecommunications and entertainment sectors. - Kantar Worldpanel is part of the Kantar Group, which is one of the world's largest insight, information, and consultancy networks.

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Source: ComCap, Capital IQ, Crunchbase, Company data

Panel Analytics Providers

Company	Profile	Capabilities
IRi *Growth delivered.*	IRI collects and integrates data collected from consumer purchases, social media posts, media and more and then uses predictive analytics to help uncover insights into consumer behaviour **Founded:** 1979 www.iriworldwide.com **Employees:** 1001 **HQ:** Chicago, Illinois **Funds Raised**: ~$2bn **Latest Financing Round:** M&A **Latest Financing Valuation:** $4bn **CEO:** Andrew Appel	**Services offered:** ▪ IRI is a Market research company specialized in development of big data and predictive analytics solutions. ▪ Largest repository of purchase, media, social, causal and loyalty data are integrated on an on-demand cloud-based technology platform. ▪ IRI guides its clients to remain relentlessly relevant, capture market share, connect with consumers and deliver market leading growth. **Key Facts:** ▪ Serves clients in CPG, OTC healthcare, retailers and media sectors. ▪ Vestar Capital Partners ("Vestar") acquired majority stake in IRI and took lead, and now the company is jointly governed with existing shareholder New Mountain Capital. ▪ IRI was valued $4bn valuation and likely to have raised more than $2bn for the stake sold as per market sources.
Edison Trends	**Edison Trends** Formerly EasilyDo, Inc transforming the way people communicate with innovative, AI-driven products: Edison Mail and Edison Trends **Founded:** 2011 www.Edison.tech **Employees:** 60 **HQ:** San Jose, California **Funds Raised**: $4.3m **Latest Financing Round:** $4.3m **Latest Financing Valuation:** N/A **CEO:** Mikael Berner	**Services offered:** ▪ Edison Trends delivers premium market intelligence, detailed and real-time data updated daily from more than 12,000 merchants. ▪ Edison Trends is a proprietary artificial intelligence product that extracts, aggregates and analyzes anonymized e-receipt data from the commercial emails registered on company's mobile application for consumers, Edison Mail. **Key facts:** ▪ Trends is a compliant, flexible and zero risk data panel owned directly by Edison. ▪ Acquired Return Path's Consumer Insights, the product that offers companies item-level ecommerce receipt data. ▪ Consumer Insights has merged into the Edison Trends platform, furthering Edison's capability to enhance company visibility into competitive landscapes, share of wallet, voice of customer, market trends, purchase preferences, price shifts.

Source: ComCap, Capital IQ, Crunchbase, Company data

Panel Analytics Providers

Company	Profile	Capabilities
1010DATA	**1010data** 1010data offers the only integrated platform that combines self-service data management and analytics at scale with ready-to-use data **Founded:** 2000 www.1010data.com **Employees:** 400 **HQ:** New York **Funds Raised**: $35m **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** President & CEO	**Services offered:** ▪ 1010data offers the only integrated platform that combines self-service data management and analytics at scale with ready-to-use data. ▪ 1010data provides actionable insight from Big Data and the best analytical tools to analyse. ▪ It's the only solution that serves the entire gamut of data insight needs, from Big Data Discovery to enterprise reporting to the sharing of Big Data among disparate organizations. **Key Facts:** • 1010data acquired by Advance Publications, Inc. in 2015 for $500mn. • More than 850 of the world's largest retail, manufacturing, telecom, and financial services enterprises trust 1010data to manage and analyze over 29 trillion rows of data.

Key Players: Digital Shelf Monitoring

Digital Shelf Monitoring

Company	Profile	Capabilities
Nielsen	**Nielsen** Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers watch and buy **Founded:** 1930 www.nielsen.com **Employees:** 39781 **HQ:** New York, New York **Funds Raised**: NA **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** David Kenny	**Services offered:** ▪ Nielsen's marketing effectiveness data and metrics helps marketers optimize their multichannel marketing, sales and operations strategies. ▪ Nielsen's Watch segment provides media and advertising clients with Total Audience measurement services for all devices on which content video, audio and text is consumed. ▪ The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. ▪ By integrating information from its Watch and Buy segments and other data sources, Nielsen also provides its clients with analytics that help improve performance. ▪ Nielsen's newly-launched hybrid audience measurement combines both user-centric (panel) and site-centric (tag-based) measurement to generate a comprehensive view of online behaviour. **Key facts:** ▪ Acquired Visual IQ, a leading independent provider of multi-touch attribution (MTA) modelling of advertising on digital platforms that helps improve ROI.
Numerator	**Numerator** Owned by Vista Equity Partners, Numerator provides Digital shelf monitoring analytics (DSM) **Founded:** 2018 https://www.numerator.com/ **Employees:** 190 **HQ:** Chicago, Illinois **Funds Raised:** $21.4m **Latest Financing Round:** $16m **Latest Financing Valuation:** N/A **CEO:** Dennis Moore	**Services offered:** ▪ Numerator brings together omnichannel marketing, merchandising and sales data to make pursuing new possibilities simple. ▪ Numerator is a market intelligence firm that brings together omnichannel marketing, merchandising and sales data to make pursuing new possibilities simple for brand, retail and agency clients. ▪ Numerator is uniquely able to link what people buy to the reasons and influences behind their purchases, combining the power of the InfoScout OmniPanel. ▪ Numerator has captured over 500 million brick-and-mortar and ecommerce purchase receipts, and the advertising, promotion, ecommerce pricing, and digital shelf messaging. **Key facts:** ▪ Numerator is a primary source of real-time, path and purchase data for industry leaders such as Nike, Unilever, Samsung, Procter & Gamble, and MillerCoors.

Source: ComCap, Capital IQ, Crunchbase, Company data

Digital Shelf Monitoring

Company	Profile	Capabilities

EDGE BY ASCENTIAL	**Edge**
	Ecommerce performance analytics for brands and retailers
	Founded: 2018 (EDGE)
	www.ascentialedge.com/
	Employees: 400
	HQ: London, 10 offices in NA, Europe and Asia
	Funds Raised: NA, Acquired by Ascential
	Latest Financing Round: NA
	Latest Financing Valuation: N/A
	CEO: Duncan Painter (Ascential)
		Services offered:
		▪ Edge by Ascential™ delivers actionable sales-driving data, insights and advisory solutions for global brands and retailers.
		▪ The company's clients are provided with a holistic view of their sales compared to the wider market and a clear plan of action to increase their performance.
		Key Facts:
		▪ Integrated various product names such as BrandView, Clavis Insight, One Click Retail and PlanetRetail RNG into Edge by Ascential in Oct 2018.
		▪ Edge by Ascential solutions for brands and retailers include the below features:
		  ▪ Weekly, daily and real-time digital shelf performance metrics
		  ▪ Monitoring of price movements, promotions, availability, product content changes and new product listings
		  ▪ SKU- and category-level online sales and share
		  ▪ Traffic, search optimization and conversion measurements
		  ▪ In-depth price and promotion analytics and benchmarking
		  ▪ Competitive and market intelligence
		  ▪ Omni-channel go-to-market and market optimization strategies

Profitero	**Profitero** Provides ecommerce performance and Digital shelf monitoring analytics **Founded:** 2010 hwww.profitero.com/ **Employees:** 190 **HQ:** Dublin, Ireland **Funds Raised**: $9m **Latest Financing Round:** $8m **Latest Financing Valuation:** N/A **CEO:** Vol Pigrukh	**Services offered:** ▪ With Profitero analytics, brands can measure their digital shelf performance across 8,000+ retailer sites and mobile apps in 50 countries and correlate with share performance. ▪ Expansion in new verticals such as electronics, apparel and outdoors keeping traction with global FMCG manufacturers. ▪ Launched Amazon Traffic & Conversion Analytics, making first solution provider to integrate daily traffic and conversion metrics, Amazon sales and share, and digital shelf analytics in one easy integrated platform. **Key facts:** ▪ Reported a 113% YoY increase in annual-recurring revenue (ARR) in 1H2018. ▪ The renewal rate for existing brand customers was 90% in 1H2018. ▪ Expanding its Amazon Analytics coverage to Australia market. ▪ Key clients include Adidas, Affinity, Alcon, Bayer, Brother, Califia, Edgewell, Evenflo, General Mills, Jack Links, LAVAZZA, Maxxium.

Digital Shelf Monitoring

Company	Profile	Capabilities
Glew.	**Glew** Glew provides hundreds of ecommerce insights across performance metrics, product sales, customers, and cost of goods sold **Founded:** 2014 www.glew.io **Employees:** 19 **HQ:** Charlotte, North Carolina **Funds Raised**: NA **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** Michael Vadini	**Services offered:** ▪ Glew is the only multi-channel ecommerce analytics product that provides all data sources transformed through ETL (extract, transform, load) ▪ Its product is delivered as both an easy to use SaaS application (Glew.io) and an intelligent data warehouse (Glew Enterprise) for custom reporting and visualizations using BI tool. ▪ Instantly measure metrics like customer lifetime value, gross margin, net profit, and more to build and automate high-quality ecommerce reports. **Key Facts:** ▪ Glew ecommerce CRM enables features to build customer loyalty, win back At Risk or recover lost customers, pinpoint customer acquisition costs, and coordinate data-driven campaigns to drive results across marketing efforts. ▪ Performance analytics brings ecommerce platform, analytics tools and advertising sources to measure key performance indicators across business and maximize store's profitability. ▪ Product analytics gives the tools to evaluate historical sales data and trends in order to help capitalize on merchandising opportunities.
e.fundamentals	**E-Fundamentals** E-Fundamentals is a British-built, world-leading ecommerce analytics service that helps brands grow revenue & margin online **Founded:** 2014 www.ef.uk.com **Employees:** 33 **HQ:** London, England **Funds Raised**: £3.7M **Latest Financing Round:** £2.5M **Latest Financing Valuation:** N/A **CEO:** John Maltman	**Services offered:** ▪ Provides insight to brand owners on the effectiveness of their online retail presence, detailing key details on pricing, positioning, and promotion from real-time data. ▪ Its Smart Start service provides insights related to customer reviews, online strategies, and activation planning. ▪ In addition, the company enables clients to put the insights generated into action through insights actioned service and educates sales and marketing teams as well. **Key facts:** ▪ E Fundamentals reviews and gathers the most up to date data about product's performance online and then compiles it into the 'The 8 Fundamentals' dashboard for better action.

Digital Shelf Monitoring

Company	Profile	Capabilities
DATAWEAVE	**Dataweave** DataWeave builds data products using publicly available data on the Web **Founded:** 2011 www.dataweave.com **Employees:** 51 **HQ:** Bangalore, India **Funds Raised**: $290k + **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** Karthik Bettadapura	**Services offered:** ▪ Powered by AI and machine-learning, the company's data products enable enterprises to better understand their competitive environment, optimize customer experience, and drive profitable growth. ▪ Provides businesses with the actionable insights that resides outside the firewalls (in the public domain) through aggregation, curation and analysis of this data. ▪ Offer two solution areas – Retail Intelligence & Brand Analytics. Retail Intelligence product provides real time analytics at scale. Brand Analytics product provides brands with insights into how their brand is being projected online. **Key Facts:** • Raised an undisclosed amount of series-A funding from investors led by one of Japan's largest ad tech companies, FreakOut Group in 2017. • DataWeave provides Competitive Intelligence as a Service to retailers and consumer brands by aggregating and analyzing billions of unstructured data points across multiple data sources on the Web.
dataimpact	**Data Impact Analytics** Data Impact plays an active role in the digitalization of the food industry. **Founded:** 1990 www.dataimpact.fr **Employees:** 11 **HQ:** Paris, France **Funds Raised**: €8M **Latest Financing Round:** €8M **Latest Financing Valuation:** N/A **CEO:** Yacine Terki	**Services offered:** ▪ Data Impact is a leading analytics and monitoring ecommerce company. ▪ The company transforms complex data into simple actions using collected Data and AI algorithmes. **Key facts:** ▪ With traditional clients such as UnileverData Impact has used the latest Big Data technologies to develop comprehensive and proactive analytics for manufacturers for all sectors. ▪ Composed mostly of Big Data engineers, their teams continually seek to improve their products to better address the current needs and innovations of the market.

Digital Shelf Monitoring

Company	Profile	Capabilities
Content ANALYTICS	**Content Analytics** Content Analytics is the leading ecommerce Optimization Platform for Brands **Founded:** 2013 www.contentanalyticsinc.com **Employees:** 52 **HQ:** San Francisco, California **Funds Raised**: $5.5m **Latest Financing Round:** $4m **Latest Financing Valuation:** N/A **CEO:** David Feinleib	**Services offered:** ▪ The #1 Digital Shelf & Content Management Platform for brands and retailers. ▪ Content Analytics, Inc. remains unique in ecommerce as it bridge the glaring gap between content only and analytics only service providers. ▪ Brands can store and catalogue content, syndicate it to retailers and optimize their business to increase sales. **Key Facts:** • Investors include Almaz Capital, Joe Schoendorf and Nancy Schoendorf, Eric Hahn, Cameron Myhrvold, Visionnaire Ventures and Zetta Venture Partners. • Clients include Crayola, Dorel, PepsiCo, Johnson & Johnson, 3M, P&G, Mondelez, Munchkin, Levi's, Mattel. • Realized record sales growth in 2018. Specifically, the business achieved records in newly signed clients, renewing clients and Annual Recurring Revenue (ARR).
CANOPY	**Canopy** One Platform for Omnichannel ecommerce Analytics **Founded:** 2015 www.canopy.net **Employees:** 51 **HQ:** Irvine, California **Funds Raised**: N/A **Latest Financing Round:** N/A **Latest Financing Valuation:** N/A **CEO:** NA	**Services offered:** ▪ Monitor and take action on important products, brands, or reviews with notifications and insights-driven triggers. ▪ Key features of product Canopy product include 1. Measure ecommerce content against best-in-class benchmarks, gaining visibility into complete product portfolio, and leveraging specific, actionable guidance for improvements on a per-item basis. 2. Supercharge interactions with customers by discovering sentiment towards brands, pinpointing review trends and keywords, and identifying important (or overlooked) questions that require attention. 3. Monitor in-stocks and product rankings with SKU-level, real-time alerts to status changes. Plug into portal data for rapid analytics of sales business metrics. 4. Know who is selling products. Defend brand presence by learning what price others are setting for items and by tracking wins and losses in the buy box.

Digital Shelf Monitoring

Company	Profile	Capabilities
Chanalytics	**Chanalytics** ecommerce performance analytics for brands and retailers **Founded:** 2014 https://www.chanalytics.io/ **Employees:** 2 **HQ:** Orem, Utah, USA **Funds Raised**: $500k **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** Greg Born	**Services offered:** ▪ Chanalytics transforms brands and gives them a huge advantage over competitors. **Key Facts:** ▪ Chanalytics has raised a total of $500K in funding over 1 round. This was a Seed round raised on Aug 23, 2017. ▪ Major clients include new balance, Google, Canon. ▪ Solutions include Consumer Insights, Shopper Marketing, Channel Marketing, Ecom Account Management.
BOOMERANG COMMERCE	**Boomerang Commerce** Boomerang's technology platform empowers profitable growth through data driven merchandising decisions **Founded:** 2012 www.BoomerangCommerce.com **Employees:** 190 **HQ:** Mountain View, California, USA **Funds Raised**: $29.5m **Latest Financing Round:** $12m **Latest Financing Valuation:** N/A **CEO:** Guru Hariharan	**Services offered:** ▪ Boomerang's technology platform empowers profitable growth through data driven merchandising decisions. ▪ Boomerang Commerce enables omni-channel retailers to maximize revenue and margin growth while remaining competitive. **Key facts:** ▪ Its SaaS based software rapidly analyzes, tests and deploys smart pricing strategies at scale for millions of products including private label. ▪ Led by veterans from Amazon, Adobe and McKinsey, Boomerang uses advanced machine learning and real-time data analytics to drive strategic pricing decisions. ▪ Top 100 omni-channel retailers such as Staples, OfficeDepot and web-only retailers such as Groupon Goods are realizing $40M in incremental revenue and $9M in incremental margins for every $1Bn in revenue they run through using Boomerang platform. ▪ Boomerang was named as a Gartner Cool Vendor for Digital Commerce 2015.

Key Players: Marketplace Listing Management

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Marketplace Listing Management

Company	Profile	Capabilities
channeladvisor	**ChannelAdvisor** ChannelAdvisor offers cloud-based ecommerce solutions that enable retailers to integrate, manage and optimize their sales activities. **Founded:** 2001 www.channeladvisor.com **Employees:** 190 **HQ:** Morrisville, North Carolina, USA **Funds Raised**: $80.7m **Latest Financing Round:** IPO **Latest Financing Valuation:** $286m **CEO:** David J Spitz	**Services offered:** • ChannelAdvisor offers cloud-based ecommerce solutions that enable retailers to integrate, manage and optimize their sales activities through dozens of online channels including Amazon, Google, eBay, Facebook and more. • Through automation, analytics and optimization, ChannelAdvisor leverages a single inventory feed to more efficiently list and advertise products online, connecting suppliers with shoppers to increase sales. **Key facts:** • Billions of dollars in sales are driven through ChannelAdvisor every year, and thousands of customers such as Eddie Bauer, Jockey and eBags depend on ChannelAdvisor to substantially grow their businesses. • Acquired HubLogix, E-Tale,RichFX, Marketworks in the past. • Its customers include online businesses of brands and retailers, as well as advertising agencies that use its solutions on behalf of their clients.
Solid Commerce	**Solid Commerce** Cloud-based ecommerce solutions for multiple listing and Marketplace Listing Management (MLM) **Founded:** 2008 www.solidcommerce.com **Employees:** 47 **HQ:** Marina Del Rey, California **Funds Raised**: $1,25m **Latest Financing Round: $750k** **Latest Financing Valuation:** N/A **CEO:** Eran Pick	**Services offered:** ▪ Liquidate Direct LLC, doing business as Solid Commerce, develops Web-based inventory management software. ▪ Manage clients marketplace inventory from multiple sources including Amazon, eBay, Walmart and others from one easy-to-use multi channel software. ▪ It enables users to view marketplace orders, print picking lists and packing slips, assign custom order status, search and find orders, and manage return process; and order management solution that enables users to view, refund, and track orders from one screen. **Key facts:** • Key client includes Nintendo, VOLCOM,Crayola, Kyocera,Bissell, Dorel.

Marketplace Listing Management

Company	Profile	Capabilities
Zentail	**Zentail** All in one SaaS platform for Multi-Channel Online Retailers **Founded:** 2004 https://www.zentail.com/ **Employees:** 28 **HQ:** Baltimore, Maryland **Funds Raised**: $5m **Latest Financing Round:** $5m **Latest Financing Valuation:** N/A **CEO:Daniel Sperling-Horowitz**	**Services offered:** ▪ Zentail offers an all-in-one suite of tools to manage ecommerce operations. **Key Facts:** ▪ Its proprietary categorization technology allows to assign categories and attributes to product listings across all of your channels. ▪ Applies the Standard Marketplace Attribution Relation Technology (SMART) to assigned the category for Amazon, eBay, Walmart, Google and Jet. ▪ Reduces the time to list product catalogue across channels by +70% and handling multi-channel listings.
sellbrite	**Sellbrite** Sellbrite is an online multichannel ecommerce platform. **Founded:** 2013 www.sellbrite.com **Employees:** 24 **HQ:** Pasadena, California **Funds Raised**: $2.7m **Latest Financing Round:** $403.8k **Latest Financing Valuation:** N/A **CEO:** Brian Nolan	**Services offered:** ▪ Sellbrite is a leading multichannel inventory and order control solution that helps retailers build, manage and grow their multichannel ecommerce business. ▪ The intuitive Sellbrite platform enables retailers to list and control their inventory on multiple online channels, such as Amazon, eBay, Walmart, Etsy, Shopify, Bigcommerce and others, all from one simple interface. **Key facts:** ▪ In addition, powerful automation and order fulfilment capabilities free up time and accelerate growth. ▪ With its wide-reaching data and reporting features, the platform delivers valuable cross-channel insights to make smarter decisions. ▪ The company was formerly known as Seller AppVantage and changed its name to Sellbrite, Inc. in July 2013.

Marketplace Listing Management

Company	Profile	Capabilities
GoDataFeed	**GoDataFeed** GoDataFeed is a subscription-based SaaS solution for ecommerce to help online retailers' product multiple listing **Founded:** 2007 www.godatafeed.com **Employees:** 21 **HQ:** Plantation, Florida **Funds Raised:** **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** Kieron Zabow	**Services offered:** ▪ GoDataFeed has been reshaping the way product feeds are delivered. ▪ Makes the feed submission process smoother and profitable. ▪ Consolidate all product data from web store, ERP, dropshippers, marketing agency, etc, into a smart catalogue that's optimized for distribution. **Key Facts:** ▪ It turn raw product data into properly formatted and optimized product listings for a variety of channels including marketplaces, shopping engines, social media platforms, affiliate networks and mobile shopping apps ▪ Platform is fully integrated with over 200 channels.
SellerActive	**SellerActive** SellerActiveâ's cloud-based software enables internet retailers to do business across multiple online marketplaces with ease **Founded:** 2012 www.selleractive.com/ **Employees:** 31 **HQ:** Portland, Oregon **Funds Raised:** **Latest Financing Round:** **Latest Financing Valuation:** N/A **CEO:** Jason Harra	**Services offered:** ▪ SellerActive provides ecommerce businesses, big and small, with essential tools for online selling. ▪ Its dashboard integrates with dozens of top marketplaces (like Amazon and eBay) and website's cart software (like Magento and 3dcart), letting clients manage all sales channels through a single easy-to-use interface. ▪ With the help of PriceIntelligence™ software, sellers can implement a dynamic pricing strategy that monitors and reacts to competitor price changes, adjusting the price on your listings automatically. ▪ Once orders start to arrive, it manage fulfilment using desktop shipping software, which instantly detects and purchases the lowest shipping rates from dozens of carriers. **Key facts:** ▪ 22,000,000 products sold, 17mn orders processed in 2017.

Marketplace Listing Management

Company	Profile	Capabilities
nChannel	**nChannel** A cloud-based integration and operations platform for multichannel sellers to share sales data across financial, POS, and ecommerce systems **Founded:** 2011 www.ascentialedge.com/ **Employees:** N/A **HQ:** Columbus, Ohio, United States **Funds Raised**: $7.3m **Latest Financing Round:** $2m **Latest Financing Valuation:** N/A **CEO:** Steve Weber	**Services offered:** ▪ nChannel, Inc. operates a Software-as-a-Service based multichannel management software for merchants to share sales data across financial, POS, and ecommerce systems. ▪ The company's software enables merchants to sell any product in any channel, online or offline, by providing a single, cloud-based platform that integrates with existing systems. ▪ It offers solutions for product information management (PIM), multichannel listing, inventory synchronization, multichannel order management, drop ship management, supply chain management, vendor managed inventory, accounting integration, marketplace integration, and customer experience management. ▪ In addition, the company's platform provides solutions for ecommerce, POS, ERP, and supply chain integration. **Key Facts:** ▪ It serves merchants of various sizes, as well as outdoor and sporting goods, consumer goods, apparel, gift and novelty, non-profit, and home industries.
MaPS SYSTEM	**MaPS System** MaPS SA develops and edits multichannel marketing software suite with master data management solution **Founded:** 2011 www.maps-system.com **Employees:** NA **HQ:** Luxembourg **Funds Raised**: $2.36m **Latest Financing Round:** $2.36m **Latest Financing Valuation:** N/A **CEO:** Thierry Muller	**Services offered:** ▪ The company offers MaPS System for master data management, multichannel publishing, and marketing database; MaPS Data Mapping module for marketing strategies; and MaPS Data Sourcing module. ▪ MaPS System offers an innovative solution for an efficient multichannel marketing based on the centralization and mastering of business data. ▪ The company also provides MaPS Data View module for the management of information; MaPS Media Library; MaPS Media Processing module, and MaPS Publishing module, a solution for consolidating and updating data. **Key facts:** ▪ Its solution is hosted as a Software-as-a-Solution. In addition, it offers services, such as immersion and audit, study and proposal, configuration and integration, delivery and support, and project follow-up; and consulting for online and offline strategies.

Marketplace Listing Management

Company	Profile	Capabilities
	CedCommerce	**Services offered:**

CedCommerce

CedCommerce Develops Well Researched & Thoroughly Tested Extensions To Suit Your Unique Requirements

Founded: 2010

www.cedcommerce.com/

Employees: 39

HQ: Lucknow, UP, India

Funds Raised: NA

Latest Financing Round: NA

Latest Financing Valuation: N/A

CEO: Mr. Abhishek Jaiswal

Services offered:

- Engaged in more than 1000+ successful ecommerce custom developments to gain a powerful insight into the requirements of the niche.

- Develops ecommerce extensions for online store owners who make use of relevant frameworks such as Magento, Prestashop, WooCommerce and others.

Key Facts:

- CedCommerce is an official channel integration partner of Walmart, Fruugo, Sears, Best Buy Canada, Newegg, Bonanza, and many other leading marketplaces.

- CedCommerce partnered with Lazada Malaysia in 2018 to offer integration extensions. The merchants approaching Lazada to sell would in turn be referred to opt the advanced integration extensions.

Key Players: Product Information Management

Product Information Management

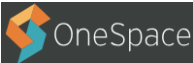| Company	Profile	Capabilities
SALSIFY	**Salsify** Salsify PIM solution is ideal for retailers. Its flexible permissions, collaborative tools and audit history capabilities make it perfect for big teams with lots of ever-changing product data **Founded:** 2012 www.salsify.com **Employees:** 346 **HQ:** Boston, Massachusetts **Funds Raised:**$97.6m **Latest Financing Round:** $43m **Latest Financing Valuation:** N/A **CEO:** Jason Purcell	**Services offered:** ▪ Salsify is a cloud-based PIM software platform that gives access to everyone to the same real-time data from anywhere in the world. ▪ Salsify integrates easily with all major ERP, DAM and ecommerce platforms. **Key Facts:** Salsify PIM features include • Real-time collaboration allows you to see updated when teammates contribute to or change product data. • Unlimited users, workflows, channels and storage. • Allow multiple languages, including English, French, Hebrew, Arabic, Chinese, Japanese and more. • One-click reminders, so you can request product data or images from your suppliers or teammates. • Scalable so you can expand during growth and cut back during hard times.
riversand	**Riversand** Riversand is an innovative leader in Multi-domain MDM and PIM solutions can handle millions of products and thousands of attributes, so any size retailer could benefit from this platform **Founded:** 2001 www.riversand.com/ **Employees:** 243 **HQ:** Houston, Texas **Funds Raised:** $35m **Latest Financing Round:** $35m **Latest Financing Valuation:** N/A **CEO:** Upen Varanasi	**Services offered:** ▪ Riversand provides its users with master data management and product information management solutions. ▪ Riversand ensures up-to-date product information is available for all areas of the retail business – from sales and merchandising to accounting, IT and more. • Riversand features include multi-region coverage, multiple languages, currencies and classifications; supports publishing to e-catalogues and print media; automates workflows and business processes etc. **Key facts:** ▪ Serves leading global enterprises in Retail, Manufacturing, Distribution, Energy, Healthcare, and Food Services. ▪ Riversand MDMCenter helps clients enhance their customers' experience and move products faster to the market. ▪ Riversand is headquartered in Houston with offices in Bangalore (India), London (UK), Stuttgart (Germany), Switzerland and Sydney (Australia)

Product Information Management

Company	Profile	Capabilities
StiboSystems	**Stibo Systems** Stibo Systems' PIM solution is a part of a larger, master data management suite, which also includes digital asset management, multidomain MDM, data governance and data quality modules **Founded:** 1976 www.stibosystems.com **Employees:** 626 **HQ:** Højbjerg, Denmark **Funds Raised**: NA **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** Niels Stenfeldt	**Services offered:** ▪ Leading provider of MDM solutions. Stibo Systems' PIM solution is a part of a larger, master data management suite, which also includes digital asset management, multidomain MDM, data governance and data quality modules. ▪ Using Stibo Systems' STEP technology, customers can leverage their product information assets and handle the complex product-oriented workflows to meet their omni-channel needs. ▪ Serves manufacturing, distribution, retail, travel & hospitality, automotive, CPG and grocery industries and manage master data on a global scale. **Key Facts:** ▪ Stibo Systems is best for retailers with larger data management issues on their hands. ▪ Key feature include : allows users to share information seamlessly with back-end systems; ensure regulatory compliance with its multidomain MDM module; lets users to amek quick search, manage digital rights/usages with DAM module; and Increases accuracy of printed materials etc
SMSB consulting group, inc. INNOVATION. EXPERTISE. INSIGHT.	**SMSB Consulting Group, Inc** SMSB Consulting Group delivers captivating product images and comprehensive product information for an enriching customer experience online, in-store, or on her mobile device **Founded:** 1986 www.smsb.com **Employees:** 59 **HQ:** Hauppauge, New York **Funds Raised**: NA **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** NA	**Services offered:** ▪ SMSB Consulting Group, Inc. delivers captivating images and the extensive data of Digital Product Content with correlative services in Digital Asset Management and Product Information Management [DAM+PIM], Planogram Development Solutions, and Category + Commerce Analytics to enhance the shopper experience and increase sales. ▪ Services include Digital Asset Management [DAM], Product Information Management [PIM], Planogram Development Solutions, Integrative Software Solutions, and Category Management for OmniChannel stakeholders operating at all touchpoints online, in-store, and across mobile devices. **Key facts:** ▪ Joined Walmart ecosystem as a Connected Content Partner [CCP] in Nov 2018.

Product Information Management

Company	Profile	Capabilities
PIMCORE Own the Digital World	**Pimcore** Pimcore is the only open source, consolidated, enterprise digital platform comprising of Product Information Management (PIM), Master Data Management (MDM), Digital Asset Management (DAM) and ecommerce **Founded:** 2010 www.pimcore.org **Employees:** 48 **HQ:** Salzburg, Austria **Funds Raised**: $3.5m **Latest Financing Round:** $3.5m **Latest Financing Valuation:** N/A **CEO:** Dietmar Rietsch	**Services offered:** ▪ Being a consolidated platform, it is in a unique position to help enterprises work quickly and efficiently by combining key applications, eliminating the need for complicated integrations, raising product quality and providing awesome ROI. **Key Facts:** • Pimcore is for fit for agencies, software integrators and enterprises looking to manage or consolidate their product information, digital assets, master data and improve customer experience. • It can integrate, consolidate, and manage any digital data. Provide the data to any channel such as commerce, mobile apps, print, digital signage. • Its open-source license enables is used by more than 80,000 companies in 56 countries and is recognized Gartner 'Cool Vendor' 2018. • Key features include, powerful modules like Users Permissions, Workflow, API, and Messaging System; highly scalable, enterprise-ready web application, "Connect Anything" architecture, API driven approach, flexible web-based data modeling engine, EDM and user-specific dashboards
OneSpace	**OneSpace** OneSpace is a sophisticated platform that connects internal teams with freelance talent and provides a customizable virtual work interface. **Founded:** 2010 www.onespace.com **Employees:** 190 **HQ:** Swansea, Illinois **Funds Raised**: $5.5m **Latest Financing Round:** $9m **Latest Financing Valuation:** N/A **CEO:** Stephanie Leffler	**Services offered:** ▪ OneSpace is a sophisticated platform that connects internal teams with freelance talent and provides a customizable virtual work interface to complete large-scale content and data projects with unprecedented efficiency. ▪ OneSpace offers enterprise businesses, such as Staples, eBay and Overstock.com, both managed services and an advanced software-as-a-service (SaaS) platform for those who wish to have full control over the workforce management process. **Key facts:** ▪ OneSpace's platform is a complete end-to-end solution for virtual talent management, helping businesses supplement their workforces with on-demand talent curated from a network of over 100,000 pre-qualified freelancers. ▪ The platform also offers data-driven performance measurement tools to help teams manage and optimize projects at scale.

Product Information Management

Company	Profile	Capabilities
olapic	**Olapic** Olapic is the leading Visual Marketing Platform. Olapic helps brands reach their consumers visually **Founded:** 2010 www.olapic.com/ **Employees:** 230 **HQ:** New York **Funds Raised**: $21.1m **Latest Financing Round:** $130m (M&A) **Latest Financing Valuation:** N/A **CEO:** Pau Sabria	**Services offered:** ▪ Olapic is the leading Visual Marketing Platform. Olapic helps brands reach their consumers visually. **Key Facts:** • Monotype, a publicly traded company focused on font design and technology, acquired Olapic for $130m in 2016. • Brands struggle to meet a demand for visual content that is growing exponentially. Olapic helps brands unlock the potential of user generated images and apply it for marketing purposes. • Olapic focuses on three steps: 1) Brands can tap into Olapic's media library that helps them build a large curated stock of on-brand user generated images. 2) Then Olapic's integration with best-in-class marketing technologies facilitates putting that content to use where it can have the greatest impact: ranging from ecommerce merchandising to ads. 3) Finally, that impact is measured by Olapic's analytics suite and insights are fed back into the product for future performance improvement**.**
nuxeo	**Nuxeo** Nuxeo offers the leading cloud-native Content Services Platform (CSP), **Founded:** 2008 www.nuxeo.com **Employees:** 157 **HQ:** Brooklyn, New York **Funds Raised**: $39.9m **Latest Financing Round:** $20m **Latest Financing Valuation:** N/A **CEO:** Eric Barroca	**Services offered:** ▪ Nuxeo, developer of the leading Content Services Platform, is reinventing enterprise content management (ECM) and digital asset management (DAM). ▪ Nuxeo platform streamlines and automates complex business processes and can handle digital content of any type and size, from traditional documents and PDFs to more media-rich video and storyboarding needs. ▪ Nuxeo's platform works behind-the-scenes, allowing employees to work the way they want, easily plugging into legacy infrastructure, and providing you with the industry's leading metadata tools. **Key facts:** • Nuxeo announced the immediate availability of LTS 2019, which delivers the latest features and functionality to the low-code Nuxeo Platform. • Its cloud-native platform has been deployed by large enterprises, mid-sized businesses, and government agencies worldwide. • Customers include Verizon, Electronic Arts, Capital One, and the Department of Defense.

Product Information Management

Company	Profile	Capabilities
Akeneo	**Akeneo** Akeneo provides open source product information management solutions and enables manufacturers and brands to turn product data into assets **Founded**: 2012 www.akeneo.com **Employees:** 142 **HQ:** Nantes, France **Funds Raised**: $15.4m **Latest Financing Round**:$13m **Latest Financing Valuation:** N/A **CEO:** Frédéric de Gombert	**Services offered:** ▪ The company's open-source product information system is designed for retailers to centralize and harmonize all the technical and marketing information of their catalogues and products. ▪ Retailers are given the ability to import and export their data to and from a common platform, organize and classify their products in a desired manner, and edit and translate attributes. **Key Facts:** ▪ Leading global brands including Sephora, Shop.com, Auchan, Jabra, Sunbelt Rentals and Faber-Castell trust Akeneo's solutions to scale and customize their ecommerce initiatives. ▪ Akeneo is based in the US, France, Germany, UK, Spain, and Israel. ▪ Integrated with Salesforce Commerce Cloud to provide personalized experiences for shoppers that span web, mobile, social and in-store.
inRiver	**inRiver** inRiver is the global market leader for simplifying Product Information Management (PIM) **Founded:** 2007 www.inriver.com **Employees:** 190 **HQ:** Skane Lan, Sweden **Funds Raised**: $17.9m **Latest Financing Round:** $10.5m **Latest Financing Valuation:** N/A **CEO:** Thor Johnson	**Services offered:** ▪ InRiver allows to push product information to many channels including ecommerce sites, catalogues, mobile devices, signage, in-store point-of-sale systems and more. ▪ InRiver takes online-only information, like customer ratings, reviews, comments and behaviour, and use them in other areas of the retail business. **Key facts:** ▪ Serves B2C and B2B multi-channel commerce professionals to create, maintain and distribute product. ▪ Provides product information management (PIM) and services to create, update, refresh, maintain and distribute products content globally. ▪ More than 1000 brands and 400 customers across 19 countries rely on inRiver to efficiently control the product flow for their globally recognized brands. ▪ inRiver is co-headquartered in Malmö, Sweden and Chicago, with additional offices in London, Amsterdam and Stockholm.

Product Information Management

Company	Profile	Capabilities
aDAM. Media Intelligent	**Adam Software NV** ADAM is ideal for B2C retailers and offers advanced tools for managing content, workflows. Its latest version ADAM 5, an enhanced enterprise marketing platform works hand-in-hand with its PIM solution **Founded:** 1985 www.adamsoftware.net **Employees:** N/A **HQ:** Belgium **Funds Raised**: $1.47m **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** John J Stammen (Aprimo LLC)	**Services offered:** ▪ ADAM's PIM software solution delivers a rich, informative and up-to-date experience across every channel. ▪ ADAM aims to eliminate data silos, and make information easy to edit, change and update by anyone throughout a retailers' organization. • ADAM Features include: works seamlessly with rich media, including videos, audio and imagery. • Ensures consistency in branding, product details and marketing themes with configurable widgets. • Offers accelerated workflows for content creation, product launch, translation, localization and drag-and-drop capabilities. **Key Facts:** • ADAM Software NV has a strategic partnership with iGATE Corporation and operates as a subsidiary of Aprimo LLC since 2017.
TRADESHIFT	**Tradeshift** Merchantary owned Tradeshift is ideal for retailers with a large number of vendors and suppliers, as it offers a self-onboarding process, which speeds up the time-to-market and cuts down on in-house labor costs **Founded:** 2004 www.tradeshift.com **Employees:** 700 **HQ:** Dublin, Ireland **Funds Raised**: $30m (M&A) **Latest Financing Round:** $30m **Latest Financing Valuation:** N/A **CEO:** Christian Lanng	**Services offered:** ▪ Tradeshift is a cloud based business network and platform for supply chain payments, marketplaces, and apps. ▪ The company helps buyers and suppliers digitize trade transactions, collaborate on processes, and connect through supply chain apps. ▪ Tradeshift features include automatic data validation at any point of entry, drop-ship modules, built-in supplier notifications and alerts, configurable business rules for attributes and validation. **Key facts:** ▪ Tradeshift acquired by Merchantry for $30m in 2015. ▪ More than 1.5 million companies across 190 countries trust Tradeshift to process over half a trillion USD in transaction value, making it the largest global business network for buying and selling.

Product Information Management

Company	Profile	Capabilities
Perfion	**Perfion** Perfion is ideal for retailers with complex product structures, multiple selling channels or multi-language sites **Founded:** N/A www.perfion.com **Employees:** 28 **HQ:** Aalborg, Denmark **Funds Raised**: N/A **Latest Financing Round:** N/A **Latest Financing Valuation:** N/A **CEO:** N/A	**Services offered:** ▪ Perfion gives one source of product data across all channels, including marketing, merchandising, sales and more. ▪ Perfion integrates easily with existing IT systems, and you can seamlessly export data to Microsoft Office, Microsoft SharePoint, Adobe InDesign, point of sale devices and more. **Key Facts:** Perfion features include: ▪ Product comparison tool, and limitless features and attributes. ▪ Built-in supplier and quality assurance specifications for purchasing and sourcing. ▪ Seasonal planning tools to help you plan and prepare for upcoming seasons. ▪ Cross selling tools to boost sales and easily print or attach QR codes.
EnterWorks	**Enterworks Acquisition, Inc.** The EnterWorks Multi-Domain Master Data Management (MDM) and Product Information Management (PIM) solutions enable companies to acquire, master, manage, govern, and transform master data and content across their value chain **Founded:** 1996 www.enterworks.com/ **Employees:** 170 **HQ:** Sterling, Virginia **Funds Raised**: $25m **Latest Financing Round:** $25m **Latest Financing Valuation:** N/A **CEO:** Rick Chavie	**Services offered:** ▪ EnterWorks PIM solution, called Enable, is an enterprise platform that manages content and digital assets, allowing retailers to publish them on multiple mediums with ease. • It creates a central repository of data which can be managed, enriched, syndicated and collaborated on by multiple users and across applications. • EnterWorks features include easily manages digital assets like multimedia, images, documents and more. ▪ Allows users to export data and publish on ecommerce sites, web and print catalogs, business applications, data pools and more. ▪ Offers portal-based applications for dealers, suppliers, sales team members, customer service reps and other personnel. **Key facts:** • Winshuttle, LLC acquired EnterWorks Acquisition, Inc. from Black Dragon Capital, LLC in Feb 2019. ▪ It serves industries, such as consumer goods, hospitality, QSR, medical, technology, office products, equipment, fashion, and services.

Source: ComCap, Capital IQ, Crunchbase, Company data

Product Information Management

Company	Profile	Capabilities
AGILITY MultiChannel BY MAGNITUDE	**Agility Multichannel** Agility is good for both B2C and B2B retailers with a need for a customizable data management solution. **Founded:** 1977 www.agilitymultichannel.com **Employees:** 101 **HQ: York, UK** **Funds Raised**: NA **Latest Financing Round:** M&A **Latest Financing Valuation:** N/A **CEO:** Chris Ney	**Services offered:** ▪ Agility is a user-friendly PIM software solution that can be custom-fit to any individual role or organizational need. • Agility Multichannel offers dynamic workflows, streamlined processes and enriched content, and its built-in integration tools make the info gathering process simple and easy. Agility Multichannel features include: ▪ Contextual views let you customize and adapt data to each specific channel ▪ Integrates easily with existing ecommerce systems ▪ Allows you to automate every step of every process ▪ Provides real-time financial and performance analytics ▪ Offers content history and auditing **Key Facts:** • Agility multichannel limited was a former subsidiary of G A Pindar and Son Limited before it was acquired by Magnitude Software, Inc. in Oct 2017.
IBM InfoSphere DataStage	**IBM InfoSphere** IBM InfoSphere is designed for B2B retailers, offering them an effective means of communicating real-time, up-to-date information to partners and suppliers. **Founded:** 1911 https://www.ibm.com/products/software **Employees:** 350,600 **HQ:** Dublin, Ireland **Funds Raised**: NA **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** Virginia M. Rometty	**Services offered:** ▪ IBM InfoSphere is an ETL tool and a robust solution designed to give retailers and businesses the real-time data they need to make strategic decisions. ▪ InfoSphere consolidates data across all channels, including ecommerce, in-store, kiosk, mobile, print catalogues and more, and it is one of the most popular PIM software solutions around. **Key facts:** IBM InfoSphere features include: ▪ Advanced reporting and auditing features ▪ Mass updating capabilities ▪ Rich text editors for web-style content ▪ Extensive modeling capabilities that can change as a business expands

Product Information Management

Company	Profile	Capabilities
nchannel	**nChannel** A cloud-based integration and operations platform for multichannel sellers to share sales data across financial, POS, and ecommerce systems **Founded:** 2011 www.ascentialedge.com/ **Employees:** N/A **HQ:** Columbus, Ohio, United States **Funds Raised**: $7.3m **Latest Financing Round:** $2m **Latest Financing Valuation:** N/A **CEO:** Steve Weber	**Services offered:** ▪ nChannel, Inc. operates a Software-as-a-Service based multichannel management software for merchants to share sales data across financial, POS, and ecommerce systems. ▪ The company's software enables merchants to sell any product in any channel, online or offline, by providing a single, cloud-based platform that integrates with existing systems. ▪ It offers solutions for product information management (PIM), multichannel listing, inventory synchronization, multichannel order management, drop ship management, supply chain management, vendor managed inventory, accounting integration, marketplace integration, and customer experience management. ▪ In addition, the company's platform provides solutions for ecommerce, POS, ERP, and supply chain integration. **Key Facts:** ▪ It serves merchants of various sizes, as well as outdoor and sporting goods, consumer goods, apparel, gift and novelty, non-profit, and home industries.
wedia	**Wedia** Wedia provides cloud based Digital Asset Management solutions to 50% of top 40 French corporations **Founded:** 2010 www.wedia-group.com **Employees:** 190 **HQ:** Dublin, Ireland **Funds Raised**: $7m **Latest Financing Round:** $5m **Latest Financing Valuation:** N/A **CEO:** Claude Cosson	**Services offered:** ▪ The Wedia CrossMedia Marketing Resource Management SAAS platform integrates marketing automation with powerful digital asset management (DAM) functionality, making it easy for marketers to create, manage, store, retrieve and distribute text, photos and rich media files. **Key facts:** ▪ Wedia is a Gartner Magic Quadrant recognized player in Marketing Resource Management (MRM) software. ▪ Its SaaS solution is used by 250 brands and 550,000 users in more than 40 countries.

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Where commerce meets capital

Product Information Management

Company	Profile	Capabilities
cs group	**The CS Group** CS Group AG provides data management solutions **Founded:** NA www.contentsphere.com/cs-group/ **Employees:** 400 **HQ:** Baar, Switzerland **Funds Raised**: $2.4m **Latest Financing Round:** $2.4m **Latest Financing Valuation:** N/A **CEO:** Armin Dressler and Patricia Kastner	**Services offered:** ▪ The CS Group providers of Product Information Management (PIM) and Master Data Management (MDM) solutions. ▪ It solutions includes capturing, processing, managing, distributing, and publishing data. **Key Facts:** ▪ The CS Group raised €2 million in funding from Jadeberg Partners AG ▪ The company caters to wholesale and retail trade, finance and insurance companies, industry and manufacturing, and consumer goods sectors.
m MaPS SYSTEM	**MaPS System** MaPS SA develops and edits multichannel marketing software suite with master data management solution **Founded:** 2011 www.maps-system.com **Employees:** NA **HQ:** Luxembourg **Funds Raised**: $2.36m **Latest Financing Round:** $2.36m **Latest Financing Valuation:** N/A **CEO:** Thierry Muller	**Services offered:** ▪ It offers MaPS System for master data management, multichannel publishing, and marketing database; MaPS Data Mapping module for marketing strategies; and MaPS Data Sourcing module. ▪ MaPS System offers an innovative solution for an efficient multichannel marketing based on the centralization and mastering of business data. ▪ The company also provides MaPS Data View module for the management of information; MaPS Media Library, a solution for preparing media for export to partner users; MaPS Media Processing module that enables users to send images in high definition for approval by groups of users involved in the ongoing project, or to generate Web and print formats; and MaPS Publishing module, a solution for consolidating and updating data. **Key facts:** ▪ Its solution is hosted as a Software-as-a-Solution. In addition, it offers services, such as immersion and audit, study and proposal, configuration and integration, delivery and support, and project follow-up; and consulting for online and offline strategies.

Product Information Management

Company	Profile	Capabilities
Magpie Travel	**Magpie Travel** Magpie Travel is a Product Information Management platform for the tours and activities industry **Founded:** 2018 www.about.magpie.travel **Employees:** ~10 **HQ:** Walnut Creek, California, US **Funds Raised**: $300k **Latest Financing Round:** NA **Latest Financing Valuation:** N/A **CEO:** Christian Watts	**Services offered:** ▪ Magpie Travel is a Product Information Management platform for the tours and activities industry. **Key Facts:** ▪ Magpie allows tour and activity operators to manage beautifully written, accurate and up-to-date product information, and publish that content to multiple channels, including their own website and app, in multiple languages. ▪ For resellers, it simplifies the process of finding and on-boarding content of the highest quality.
QUABLE	**Quable** Provides ecommerce performance and Digital shelf monitoring analytics **Founded:** 2011 www.quable.com/ **Employees:** 190 **HQ:** Paris, France **Funds Raised**: $2.83m **Latest Financing Round:** $2.73m **Latest Financing Valuation:** N/A **CEO:** François-Emmanuel Lamellière	**Services offered:** ▪ Quable PIM is a simple and collaborative SaaS platform that optimises Product Information Management and omnichannel distribution. ▪ The company software allows users to centralize and consolidate product information. Its solution allows users to import data, customize product sheet, search, syndicate product, and manage the distribution of its product. **Key facts:** ▪ The company's SaaS solution enables brands to work in teams on the quality of product-related information and improve the omni-channel performance of their product catalogues. ▪ Quable SAS raised €2.5 million in funding from SaaS Partners SAS, Les Entrepreneurs Reunis SAS in Nov 2018.

Product Information Management

Company	Profile	Capabilities
Informatica	**Informatica** Informatica is a comprehensive, holistic hub of information taken from all retailers' channels and platforms. **Founded:** 1993 www.informatica.com **Employees:** 4,048 **HQ:** Redwood City, California, US **Funds Raised**: NA **Latest Financing Round:** $5.3bn (M&A) **Latest Financing Valuation:** N/A **CEO:** Anil Chakravarthy	**Services offered:** ▪ Informative is best for B2C retailers looking for a way to improve their product data accuracy and shorten their supplier onboarding process. **Key Facts:** • Acquired by Permira for $5.3bn in 2015 after got delisted from Nasdaq. Key features include: ▪ Simple supplier portals for self-onboarding ▪ Intuitive tools that help you segment, personalize and get more from your sales ▪ Manages and automates business processes ▪ Integrates easily with ecommerce systems, point-of-sale devices, catalogues, mobile apps and more ▪ Offers a simple web-based search
MOAT	**Moat** Digital measurement cloud company with Ad search engine **Founded:** 2010 hwww.moat.com/ **Employees:** 190 **HQ:** Dublin, Ireland **Funds Raised:** $67.5m **Latest Financing Round:** $50m **Latest Financing Valuation:** N/A **CEO:** Jonah Goodhart	**Services offered:** • Moat Ad Search is a search engine that focuses entirely on ads instead of other kinds of online content. ▪ Similar to traditional search engines, its results are compiled using a web crawler that is specifically tuned to look for ads on the web and index them for later retrieval. ▪ Moat also accepts submissions from advertisers and agencies that wish to have their ads included. **Key facts:** ▪ Moat was acquired by Oracle in 2017 for $850m. Moat's enterprise client base and industry-leading attention analytics provided a strong complement to Oracle Data Cloud's audience targeting and measurement solutions in the deal.

Source: ComCap, Capital IQ, Crunchbase, Company data

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Company	Profile	Capabilities
Reltio	**Reltio** Reltio is a modern Master Data Management (MDM) Platform **Founded:** 2011 www.reltio.com/ **Employees:** 101+ **HQ:** San Francisco, Bay area **Funds Raised**: $117m **Latest Financing Round:** $45m, Series D **Latest Financing Valuation:** N/A **CEO:** Manish Sood	**Services offered:** ▪ Reltio is a modern Master Data Management (MDM) Platform - a native cloud platform that organizes enterprise data for digital transformation. ▪ Reltio Cloud is a modern MDM Platform for Global 2000 companies to power their digital transformation and data compliance initiatives such as GDPR. **Key Facts:** ▪ Helps companies turn their data into information and knowledge assets in the most efficient way. ▪ Launched Reltio Cloud 2019.1 that includes new integration, collaboration, and globalization enhancements. These capabilities will support the increasing use of Reltio Cloud for delivering personalized customer experiences in areas such as B2C loyalty programs and B2B self service. ▪ Reported strong fourth quarter of 2018, was also its second consecutive record high sales quarter.
TIBCO	**TIBCO Software** Tibco software is a company that helps businesses use their own data to help build up infrastructures. **Founded:** 1985 www.tibco.com **Employees:** 190 **HQ:** California **Funds Raised**: NA **Latest Financing Round:** $4.3Bn (M&A) **Latest Financing Valuation:** N/A **CEO:** Murray Rode	**Services offered:** ▪ Tibco software provides integration, analytics and event-processing software for companies to use on-premises or as part of cloud computing environments. ▪ TIBCO Software offers infrastructure and business intelligence software worldwide. ▪ TIBCO's integration and core infrastructure product line helps organizations integrate their disparate systems and move towards flexible infrastructure. **Key facts:** ▪ The company has been acquiring multiple organization in the past, SnappyData was the latest in Mar 2019, to strengthen its portfolio offerings. ▪ Vista took Tibco private in 2014 in a deal valued at about $4.3 billion including debt.

Product Information Management

Company	Profile	Capabilities
MAGNITUDE	**Magnitude Software** Service provide in enterprise information management with solutions in business intelligence, data warehousing and master data management. **Founded:** 2014 www.magnitudesoftware.com/ **Employees:** 116 **HQ:** Texas **Funds Raised**: $299.25m **Latest Financing Round:** $179m **Latest Financing Valuation:** N/A **CEO:** Chris Ney	**Services offered:** ▪ The company's clients are provided with a holistic view of their sales compared to the wider market and a clear plan of action to increase their performance. ▪ Magnitude's portfolio of products includes: simplified application data access to any data source; product information management (PIM); data management solutions for the SAP and commerce verticals; simplified master data harmonization and governance; and packaged application analytics and reporting solutions for SAP and Oracle. **Key Facts:** ▪ Over 600 customers rely on Magnitude Software products to run their business. ▪ Noetix Analytics for Oracle E-Busines has enabled customers to simplify access to application data in support of enterprise-wide reporting and analytics. ▪ Kalido enables companies to manage data as a shared enterprise asset with speed, agility and flexibility.
BackOffice ASSOCIATES	**Backoffice Associates** BackOffice Associates provides data migration and information governance solutions, with focus on enhancing ERP data quality **Founded:** 1996 www.boaweb.com **Employees:** 800 **HQ:** Massachusetts, United States **Funds Raised**: $30m **Latest Financing Round:** M&A **Latest Financing Valuation:** N/A **CEO:** David Booth (Bridge growth partners)	**Services offered:** ▪ BackOffice Associates provides data migration and information governance solutions, with focus on enhancing ERP data quality. ▪ BackOffice Associates solves complex enterprise data transformation challenges by combining data expertise, intelligent software and packaged solution accelerators to yield certain and superior business outcomes. **Key facts:** ▪ Our products and services enable organizations to accelerate growth, gain actionable visibility and reduce risks. ▪ Bridge Growth Partners acquired majority stakes in BackOffice in 2017 ▪ BackOffice Associates has 800+ employees and 500+ customers worldwide. ▪ Customers include including Eli Lilly, Kraft and Graybar. ▪ BackOffice Associates is a global corporation headquartered in Massachusetts with additional offices in the U.S., Australia, Canada, Dubai, India, Singapore, Switzerland and the U.K

Product Information Management

Company	Profile	Capabilities
Oracle PIM	**Orcale PIM** Oracle is one of the most widely used PIM platforms around **Founded:** 1977 www.Orcale.com **Employees:** 10000 **HQ:** Redwood Shores, California, US **Funds Raised**: NA **Latest Financing Round:** NA **Latest Financing Valuation:** NA **CEO:** Mark Hurd/Safra Catz	**Services offered:** ▪ Oracle's PIM software solution creates a central repository for all vital product data, including both supplier information and individual location/channel information. ▪ Oracle's PIM software is designed more for B2C work – for sharing and disseminating product information throughout the organization and with business partners and suppliers. **Key Facts:** Oracle Features • Helps ensure compliance with industry regulations • Allows you to securely share product information with partners and teammates • Easily scalable
SAP Hybris	**Hybris Software** The SAP Hybris master data management and PIM software solution centralizes all product and customer data in one single view. **Founded:** 1997 www.hybris.com **Employees: 501+** **HQ:** Muenchen, Bayern, Germany **Funds Raised**: $30m **Latest Financing Round:** M&A by SAP **Latest Financing Valuation:** $1.4bn **CEO:** Bill McDermott, SAP	**Services offered:** ▪ Hybris software combines internal and external data sources, offline channels and online channels, and allows users across the organization to access the information in real time. ▪ The Hybris solution is Ideal for B2C retailers with a lot of online presence. It's designed to enhance traditional PIM systems with additional online and digital features and to improve the overall customer experience. **Key facts:** Hybris Software features include: ▪ Also works with user-generated content ▪ Functions across multiple devices ▪ Allows for down-channel selling and unique catalogue production for different sites, enterprises and groups ▪ Has built-in search engine optimization tools ▪ Offers seamless conversion between currencies and markets ▪ Easy-to-use import tools for supplier onboarding

Source: ComCap, Capital IQ, Crunchbase, Company data

Appendix

Why ComCap?

- **Who is ComCap?**
  - Digital commerce focused boutique, 100% focused on the ecommerce value chain
  - Proven team with background at Credit Suisse, Wells Fargo Securities, and Battery Ventures with 50+ years of combined experience
  - Senior execution with a strong bench team for support
  - We are small, so we must be selective, working only on the best probability engagements, but working ferociously to achieve a great outcome
  - We do deals where we add unique value – not untargeted auctions to test the market

- **How do we differentiate?**
  - Vertical focus enables deep understanding of your value proposition
  - Unique synergies identification and advocacy process – based on bottoms up revenue and profit analysis of the value of entering new geographies, new verticals for strategic investors / buyers
  - Huge network among strategics in the US, Europe and Asia
  - 50% of our transactions are cross border (active in the US, Asia, Europe and LatAm)
  - New market entry experience on buyside

- **Win-win proposal and differentiated proposition for our clients**
  - While we may charge premium pricing, we offer greater levels of service than other firms, and our client references will attest to this

COMCAP
Where commerce meets capital

ComCap – Active in 14 countries, including 8 of the top 10 global ecommerce markets

Retail ecommerce Sales Worldwide – 2017 ($US bn)[1]

China	US	UK	Japan	Germany	France	South Korea	Canada	Brazil	Australia
$1,208.3	$431.8	$121.4	$111.3	$76.5	$49.7	$46.6	$35.1	$24.7	$22.3

[1]Source: Statista

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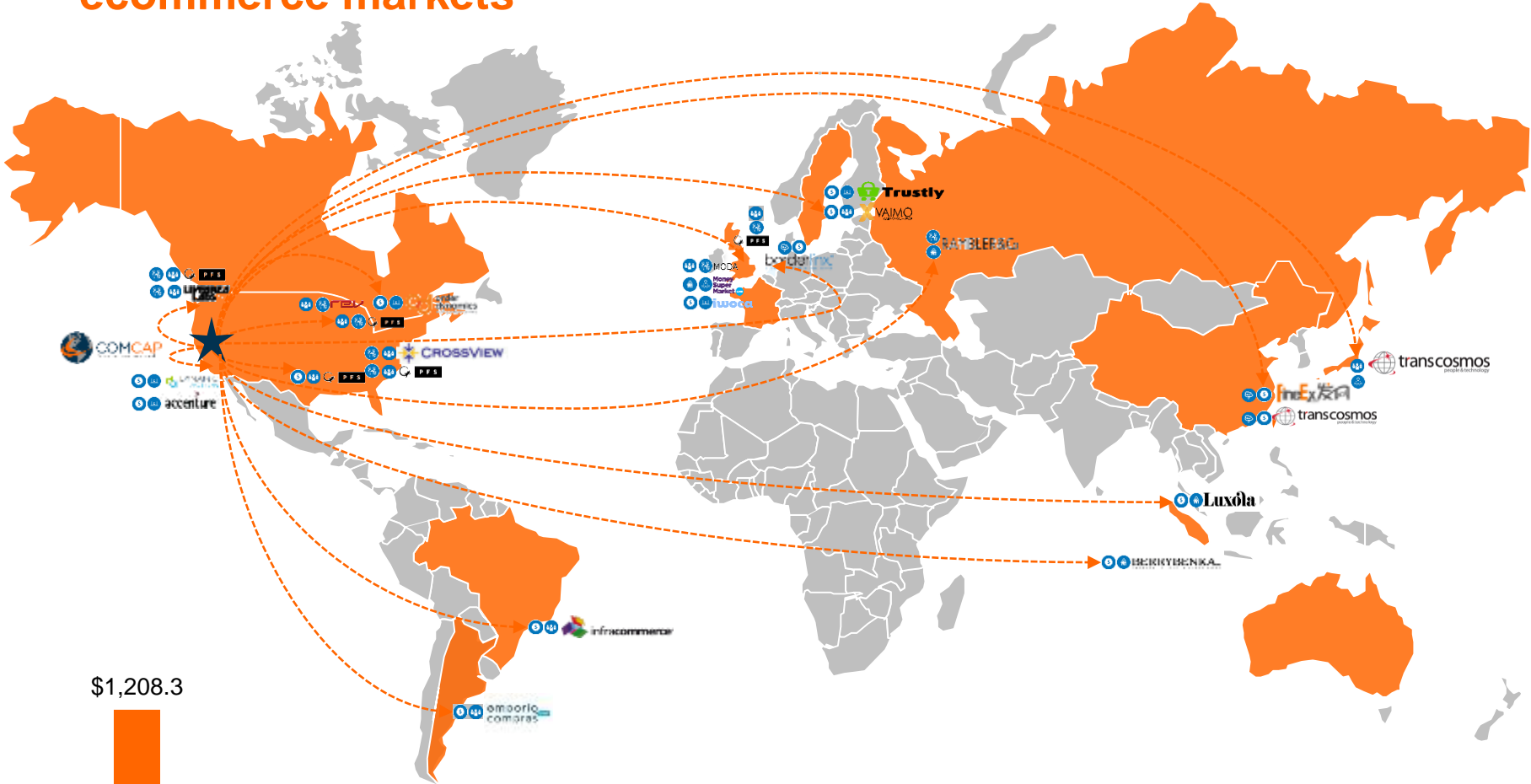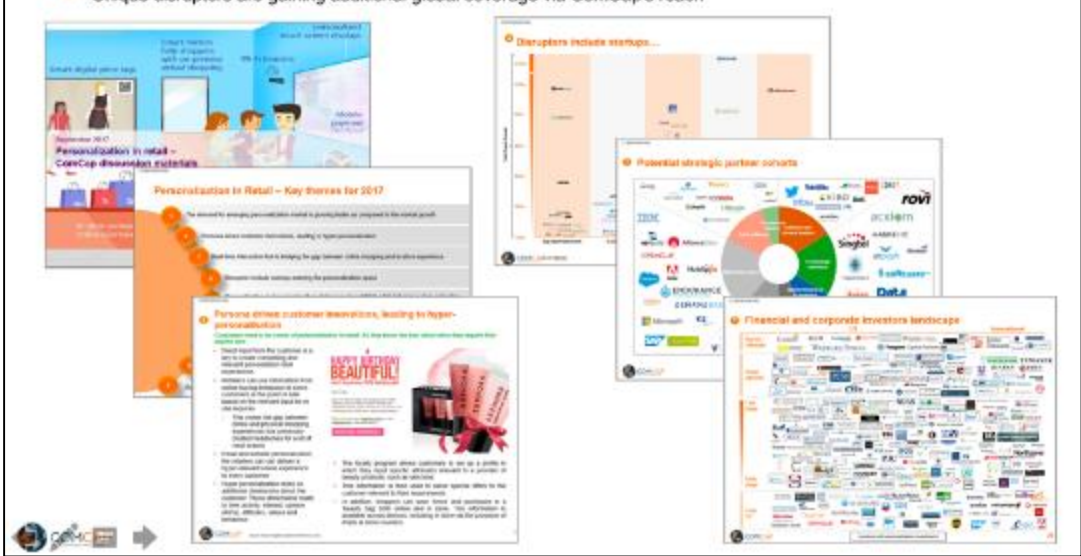
ComCap occupies a unique position in the advisory landscape

- Only boutique focused on "digital retail"
- Actively host forums at major industry events
- Partner of choice for major SaaS investors
- Actively publish research educating major strategics and private equity firms about trends in the space and leaders
- As such we have unparalleled access to key buyers