

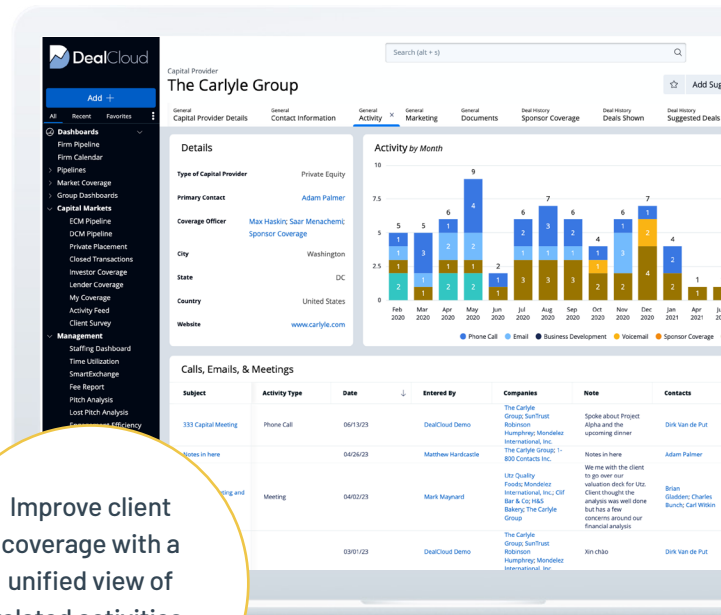
DealCloud for Investment Banking and Advisory

The complex dynamics of today’s fast-moving markets demand that investment bankers and M&A advisors become more agile. Whether your firm’s professionals need to bolster their capabilities in cultivating client relationships, filling and managing the deal pipeline, or simply gaining visibility into active engagements, it’s clear that there’s a need for purpose-built technology that modernizes deal and relationship management.

DealCloud delivers an all-in-one solution that allows investment bankers to build and maintain meaningful client relationships, analyze market trends and active pursuits, and streamline deal execution – all of which help boost win rates and increase operational efficiency.

How DealCloud powers investment banking and advisory

- Build deal-winning relationships**
 Discover and nurture meaningful corporate and sponsor connections to source new opportunities and maintain strong client relationships.
- Gain a bird’s-eye view of the industry**
 Centralize third-party market intelligence alongside proprietary firm knowledge to identify opportunities, build stronger pitches, and win more business.
- Institutionalize team progress**
 Increase firmwide collaboration, fast-track communication, and improve decision-making with powerful reporting features.
- Accelerate counterparty list creation**
 Streamline buyers list creation with the ability to query and filter lists based on historical engagement data and third-party intelligence.
- Streamline engagement execution**
 Centralize M&A deal execution and insights to promote collaboration across industry and product groups while simultaneously improving client outcomes.



Improve client coverage with a unified view of related activities, deals, and more

“The ease of use and functionality of DealCloud has really driven banker adoption, which in turn, has significantly enhanced the quality of information and usefulness of our system.”

JIM JOHNSON, MANAGING DIRECTOR AND CHIEF ADMINISTRATIVE OFFICER OF INVESTMENT BANKING, STEPHENS

Spark new value for investment bankers and advisors

DealCloud adds value to the firm across coverage and product groups, and it's easy to understand why. The industry cloud solution is purpose-built to give investment banking professionals the power to centralize a collaborative, uniform deal process from prospecting through execution.

Optimize relationship building and intelligence

Save time and share meaningful insights through automated data capture, relationship scoring, and intelligence reporting.

Empower real-time knowledge sharing

Quickly share and gain insights with notifications, interactive dashboards, templated reports, and a two-way sync with Microsoft Excel.

Leverage integrated market data

Surface precedent transactions and competitor activity by enriching the firm's proprietary knowledge with third-party data from market-leading data providers.

Streamline reporting and automation capabilities

Drive alignment and maximize pipeline management by automating data capture, diligence workflows, notifications, and reports.

Unlock centralized data storage

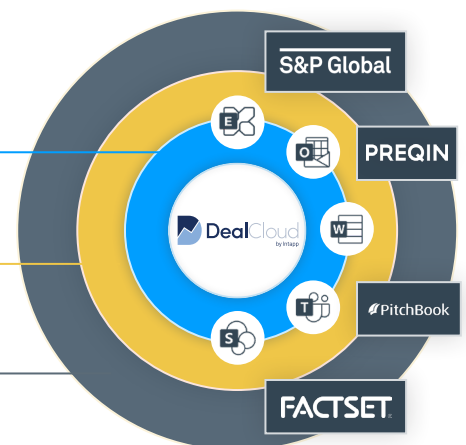
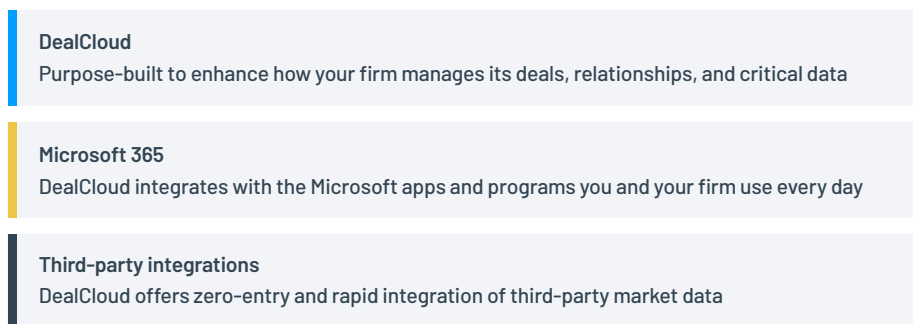
Access data from a centralized hub that also integrates and syncs information from the Microsoft 365 apps your team uses every day, including Microsoft Outlook and Excel.

Accelerate data-informed firm marketing

Quickly create target lists of potential buyers, and send newsletters and event invites, leveraging historical outcomes and third-party data.

DealCloud creates a single source of truth for your firm

Easily access the information you rely on every day within a single system.



Learn how DealCloud was purpose-built to give investment banking professionals a better way to work at dealcloud.com/investment-banking.

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