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CORPORATE FINANCE

State of Global Tech & VC Funding in 2022

Keynote by Yoram Wijngaarde

TNW Conference

June 16 & 17, 2022 • Amsterdam

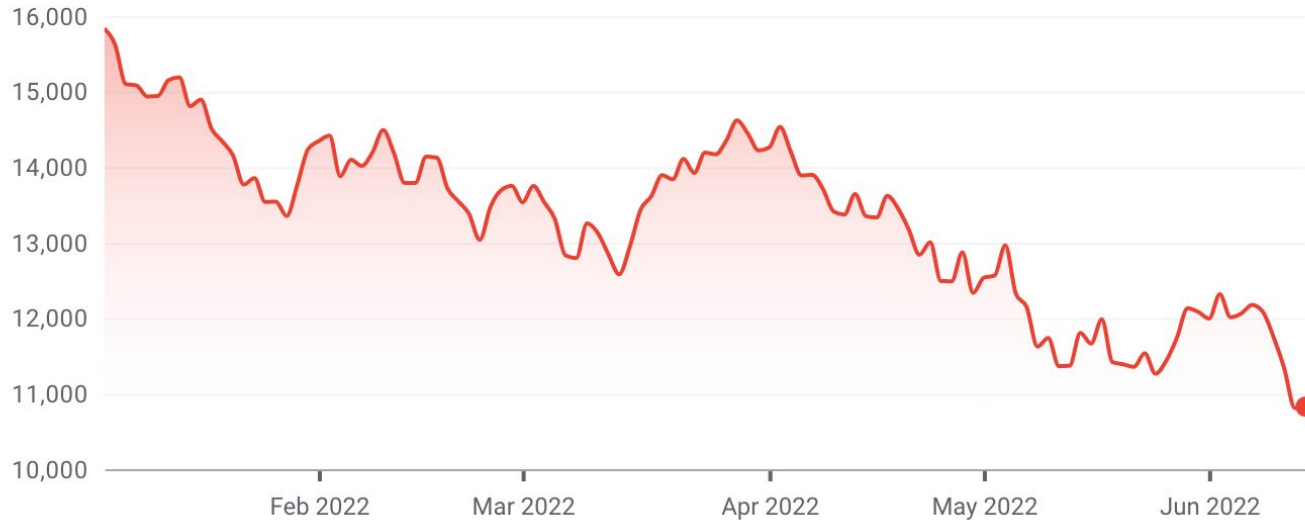
Nasdaq is down 30% year to date, wiping out \$5.5 trillion in value.

10,828.35

↓ 31.61% -5,004.45 YTD

Jun 14, 5:15:59 PM UTC-4 · INDEXNASDAQ · Disclaimer

1D 5D 1M 6M YTD 1Y 5Y MAX



How does it compare to the dot-com crash?

10,828.35

↑ 6,326.32%

+10,659.85 MAX

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1D

5D

1M

6M

YTD

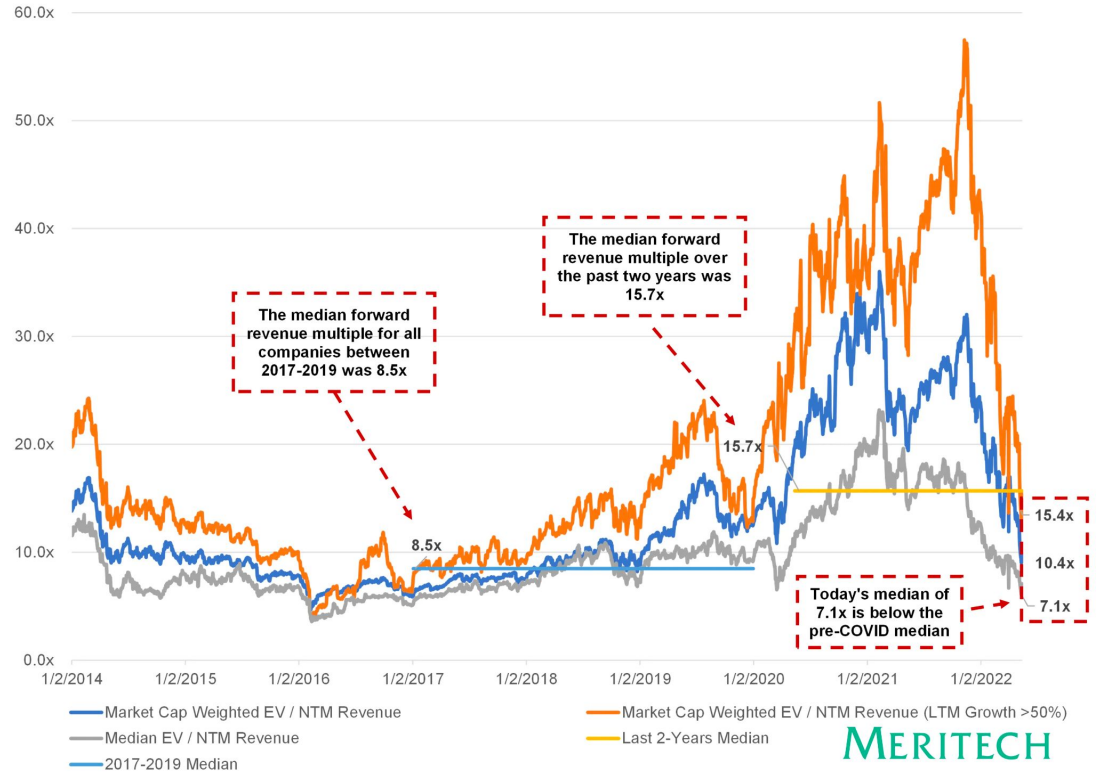
1Y

5Y

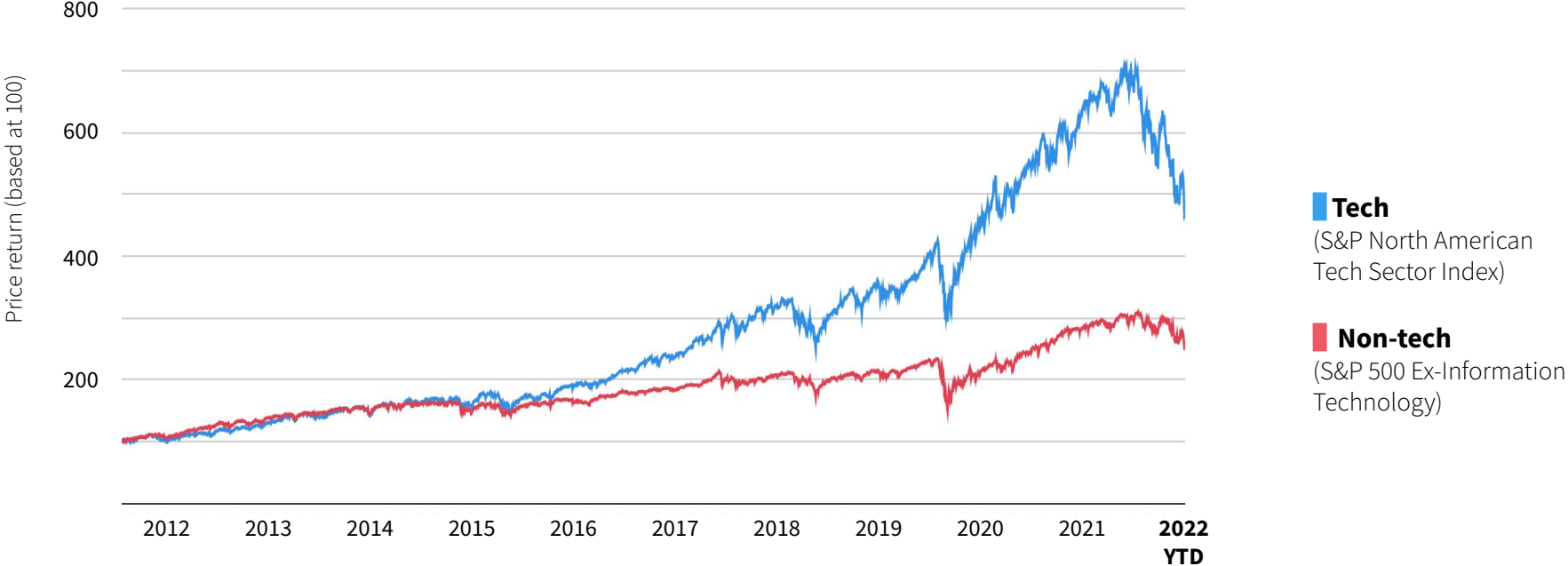
MAX



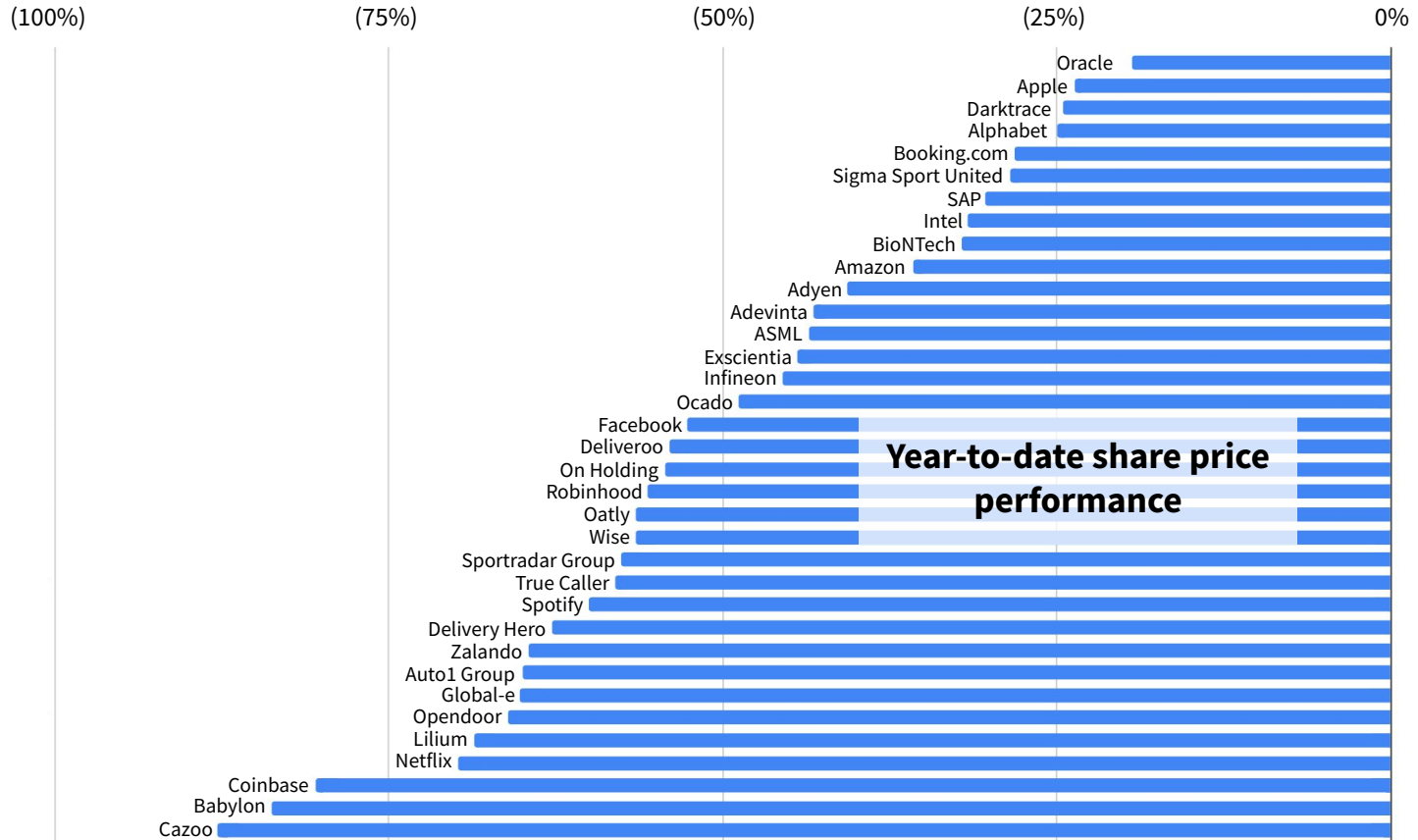
Valuation multiples of high-growth companies are back to historic levels. As a result, many late stage investments are deeply under water causing a shock to the system.



Tech still outperforms overall economy by far.

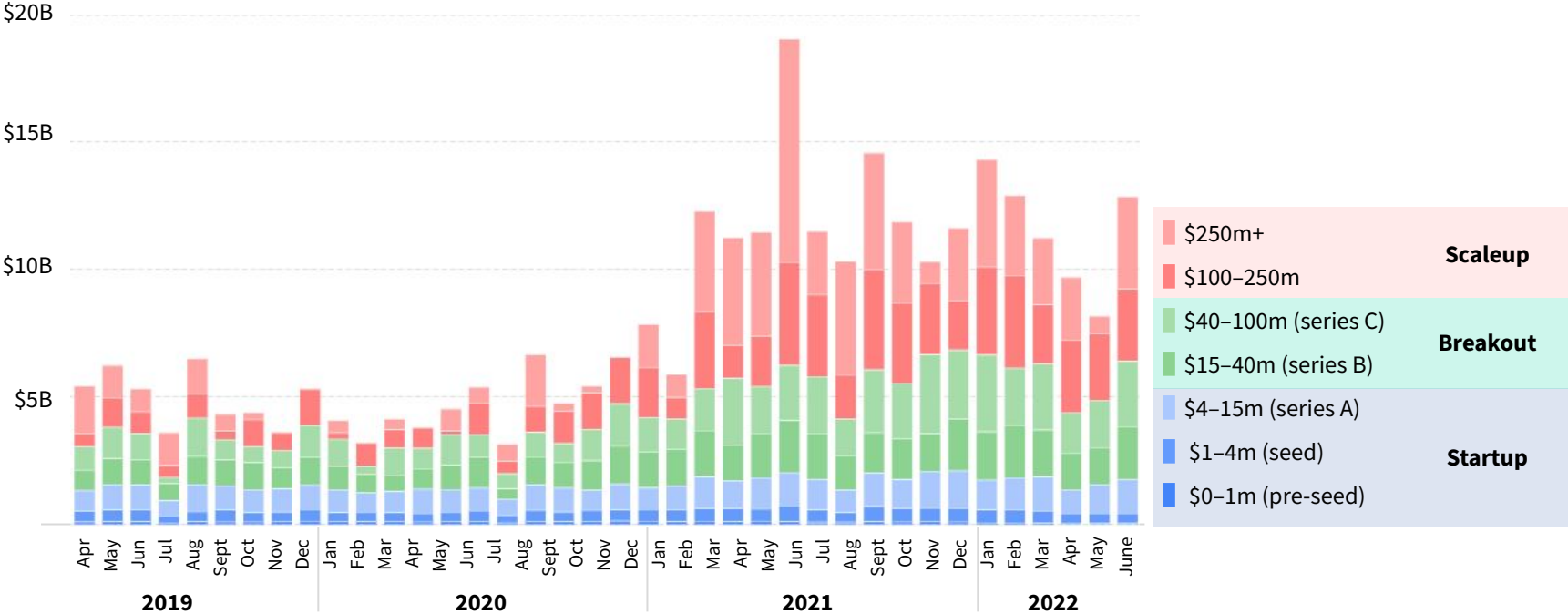


The big dispersion in tech stocks: flight to cash-flows.



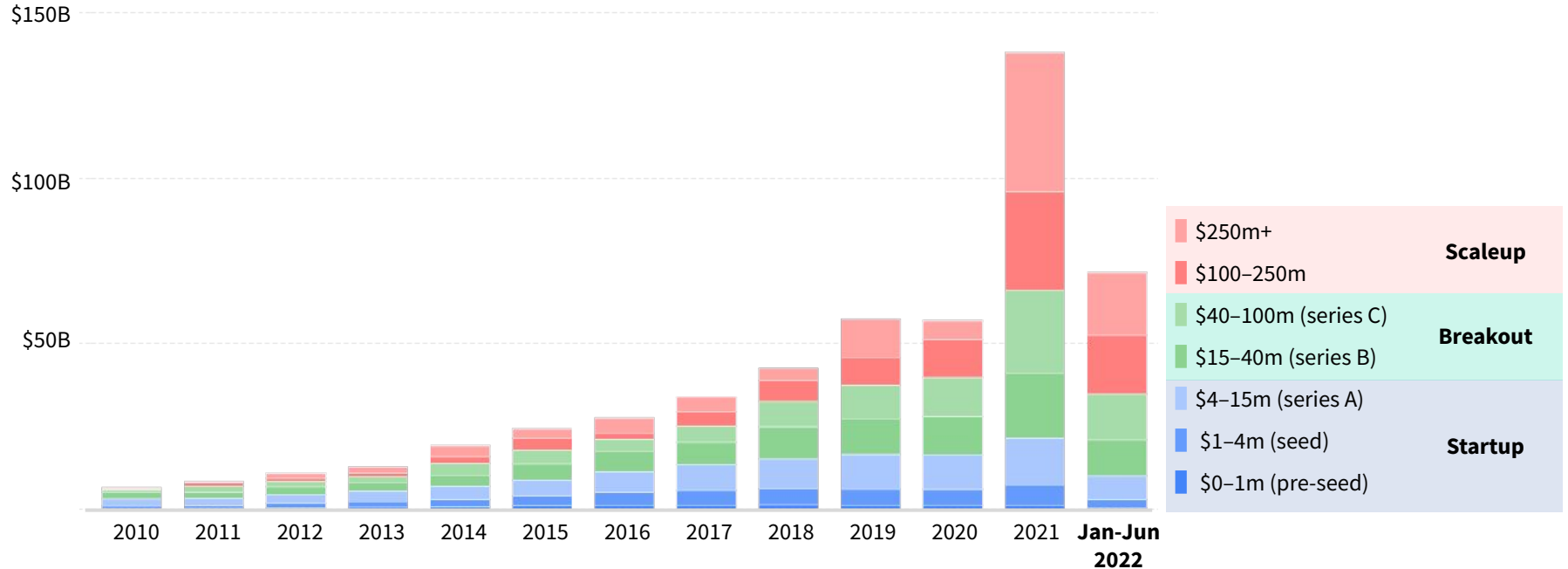
VC activity is also slowing down, but still high and June was again up.

VC investment in EMEA startups » [view online](#)



Weirdly, 2022 investment is already above the level of the full year of 2020.

VC investment in EMEA startups » [view online](#)



Later stages have been the most hyped, but are so far still active.

Startup stage

Breakout stage

Scaleup stage

Seed

\$1-4M

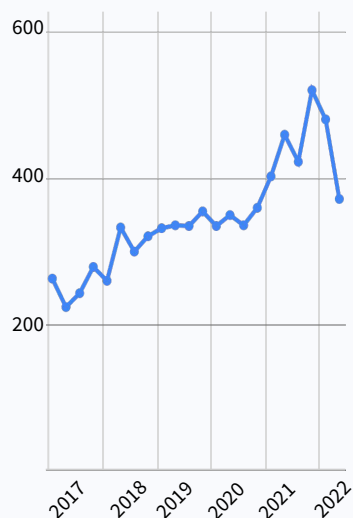
Quarterly nr. of rounds



Series A

\$4-15M

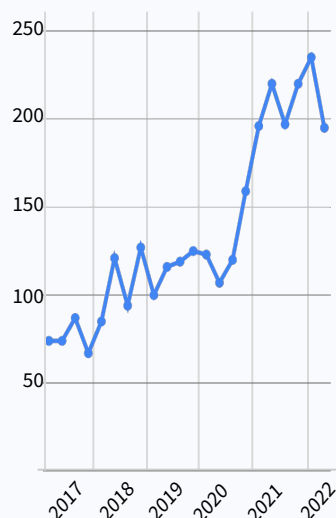
Quarterly nr. of rounds



Series B

\$15-40M

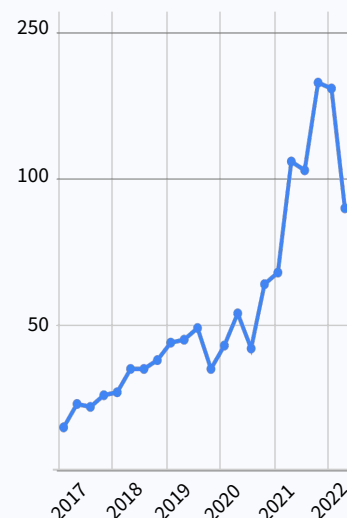
Quarterly nr. of rounds



Series C

\$40-100M

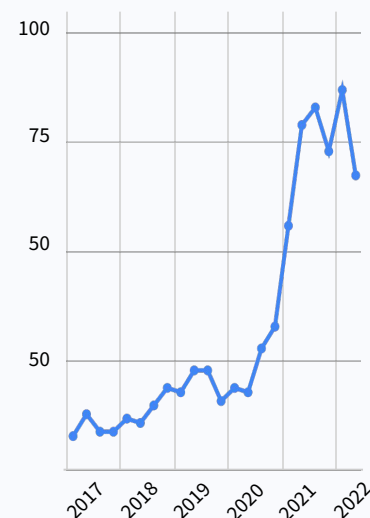
Quarterly nr. of rounds



Megarounds+

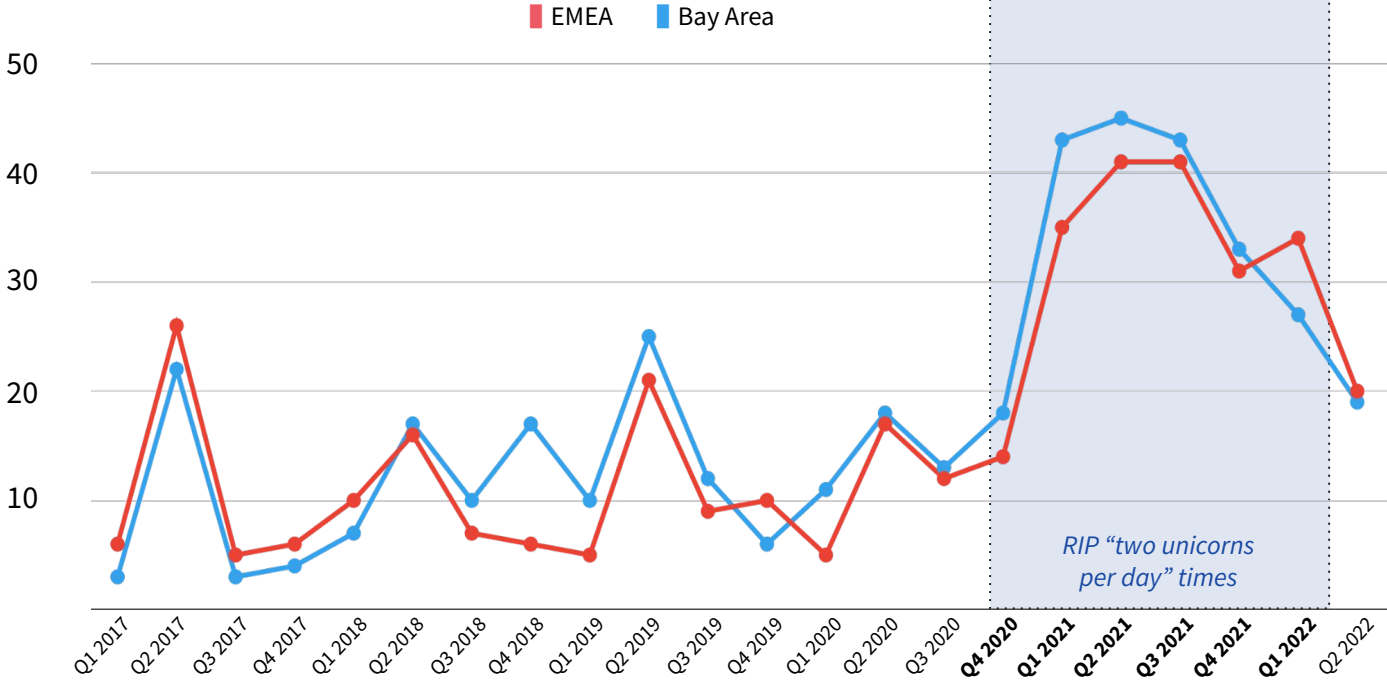
\$100M+

Quarterly nr. of rounds



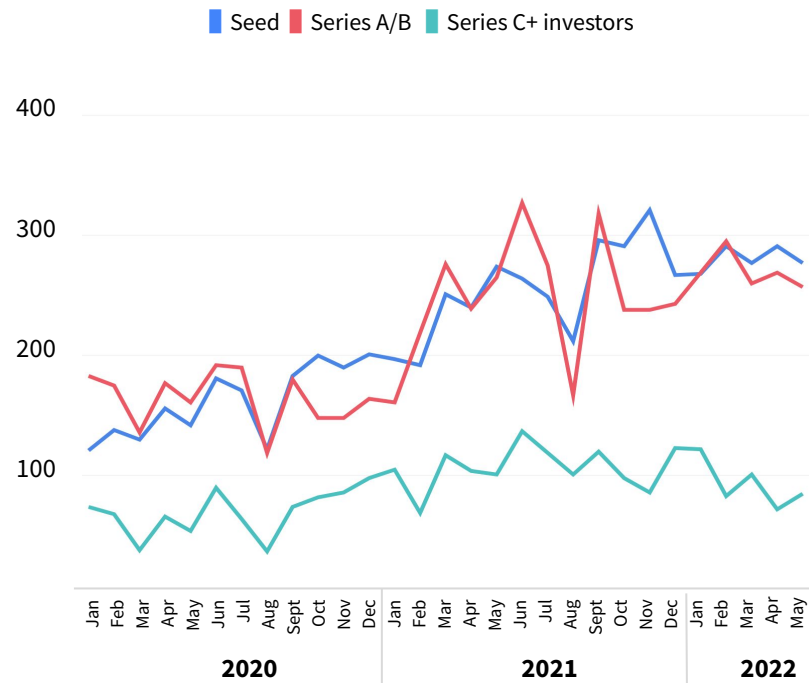
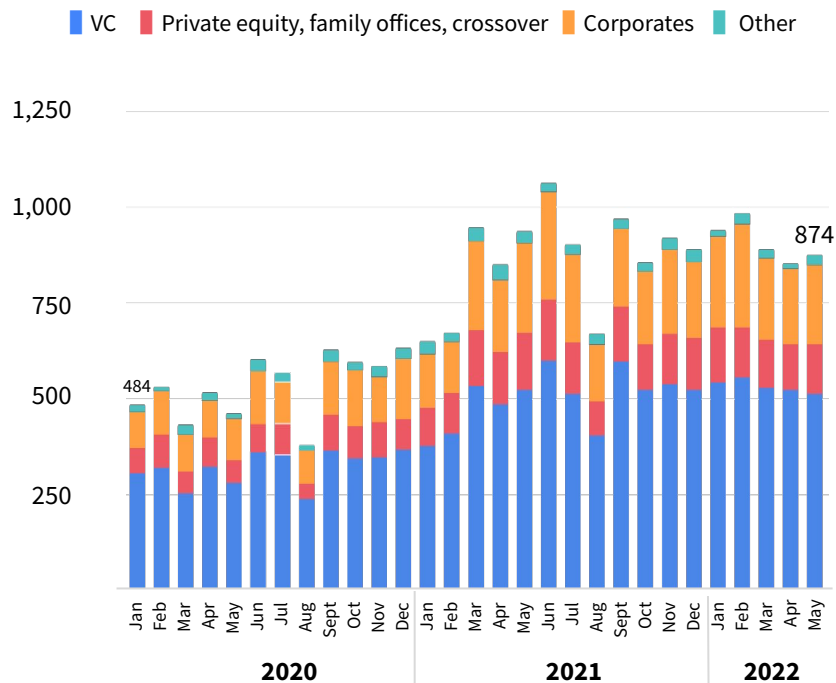
Unicorn creation is slowing down, back to pre-pandemic levels.

Number of new unicorns » [view online](#)



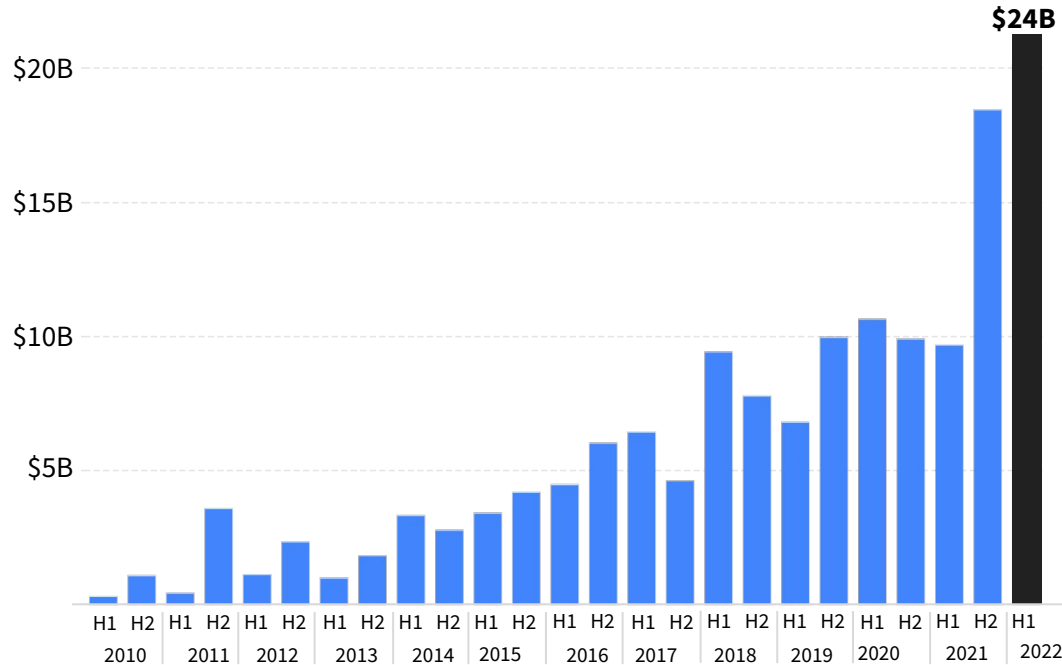
The number of VC investors deploying in Europe remains largely unchanged so far.

Investors with at least one European VC investment each month



VCs in EMEA raised \$24 billion in 2022.

New funds raised by EMEA investors » [view online](#)



Notable funds raised in 2022

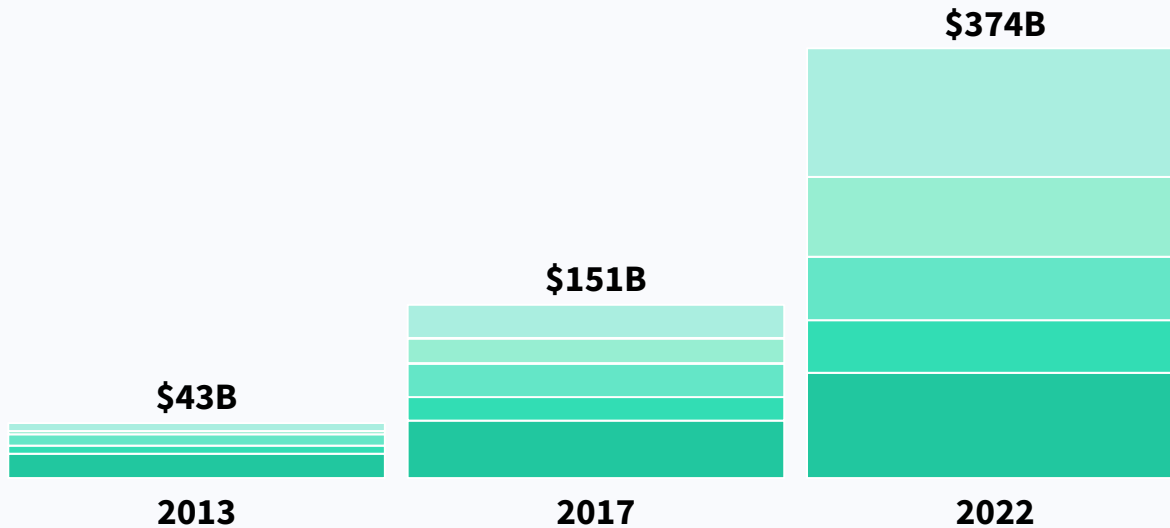
 \$1.0B	 \$1.0B	 \$1.0B
 \$650M	CREANDUM €448M	 €430M
 BLOSSOM €379M	468 Capital \$400M	 \$350M

Tech continues to eclipse other sectors.



Continued structural tailwinds. For instance, the biggest wave of Enterprise Cloud/SaaS adoption is happening now.

Enterprise spending on Cloud/SaaS

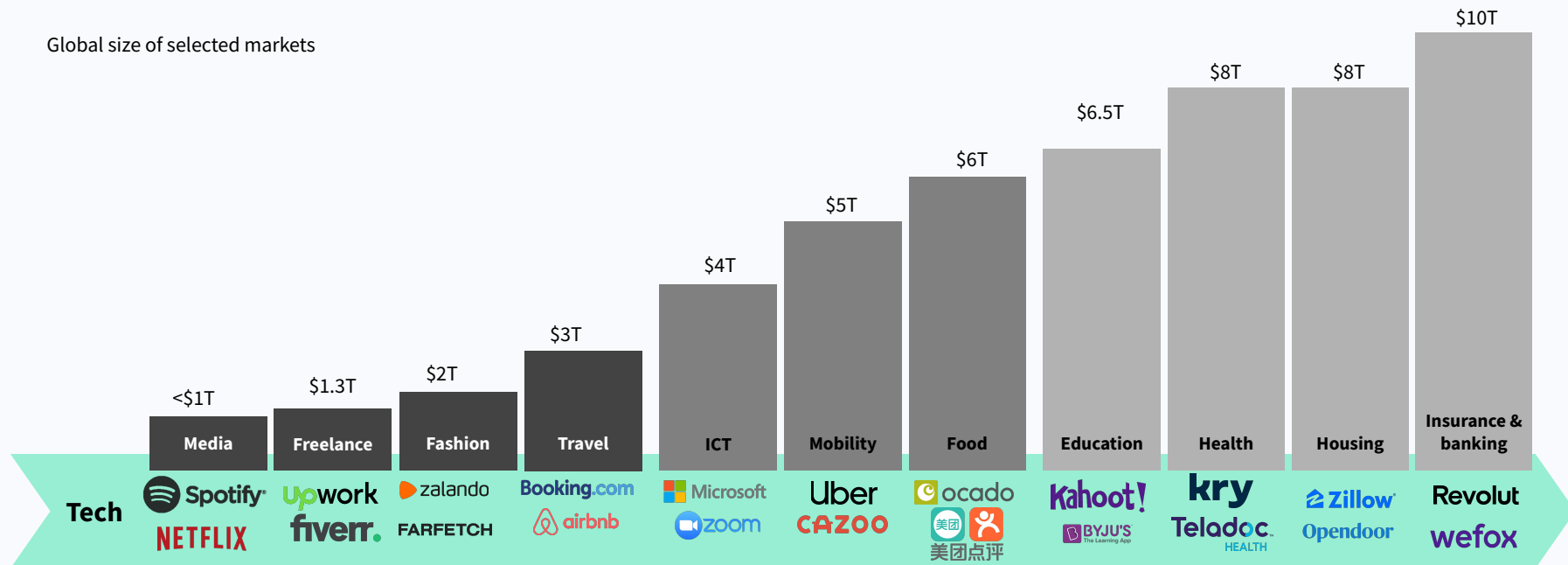


Early vs. late adopter personas (Bain)

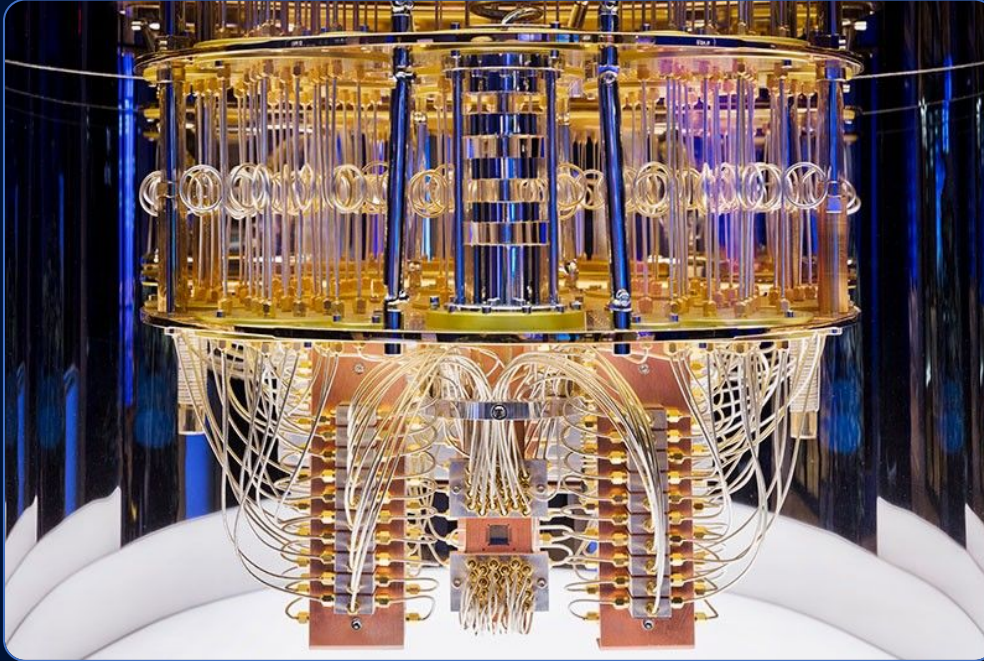
- ▶ Slow and Steady
- ▶ Price Conscious
- ▶ Price Conscious
- ▶ Heterogeneous
- ▶ Transformational

Entrepreneurs are going after bigger markets than ever before.

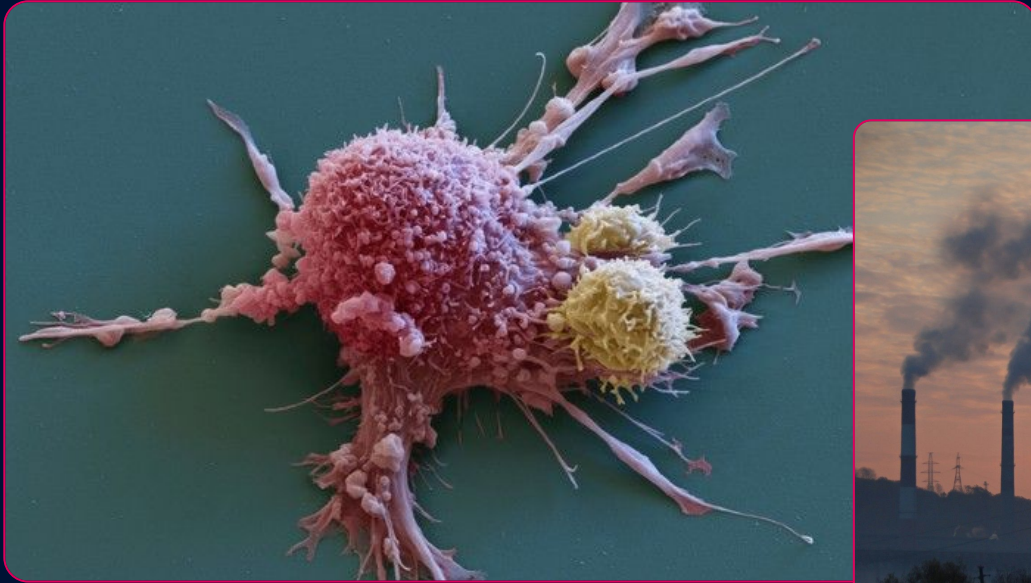
Global size of selected markets



From quantum computing to space tech, we're entering a **futuristic age**.



Many startups are directly addressing some of **the planet's biggest challenges.**



Two mega-trends, reinforcing each other.



Exponential age *

Radical innovations at accelerating pace



Entrepreneurial age **

Startups + VC are driving innovation

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