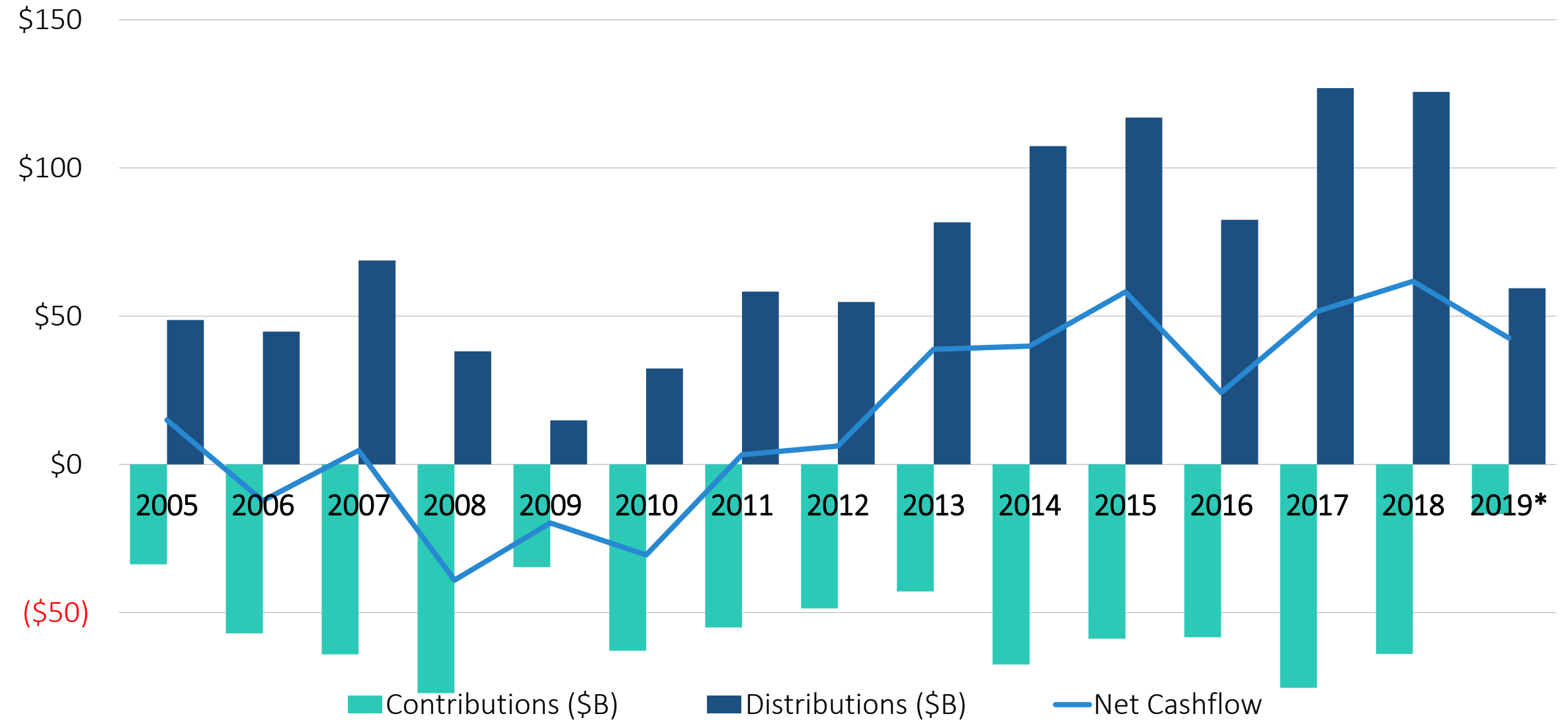




Running for scale? The rise of pan-European Platforms

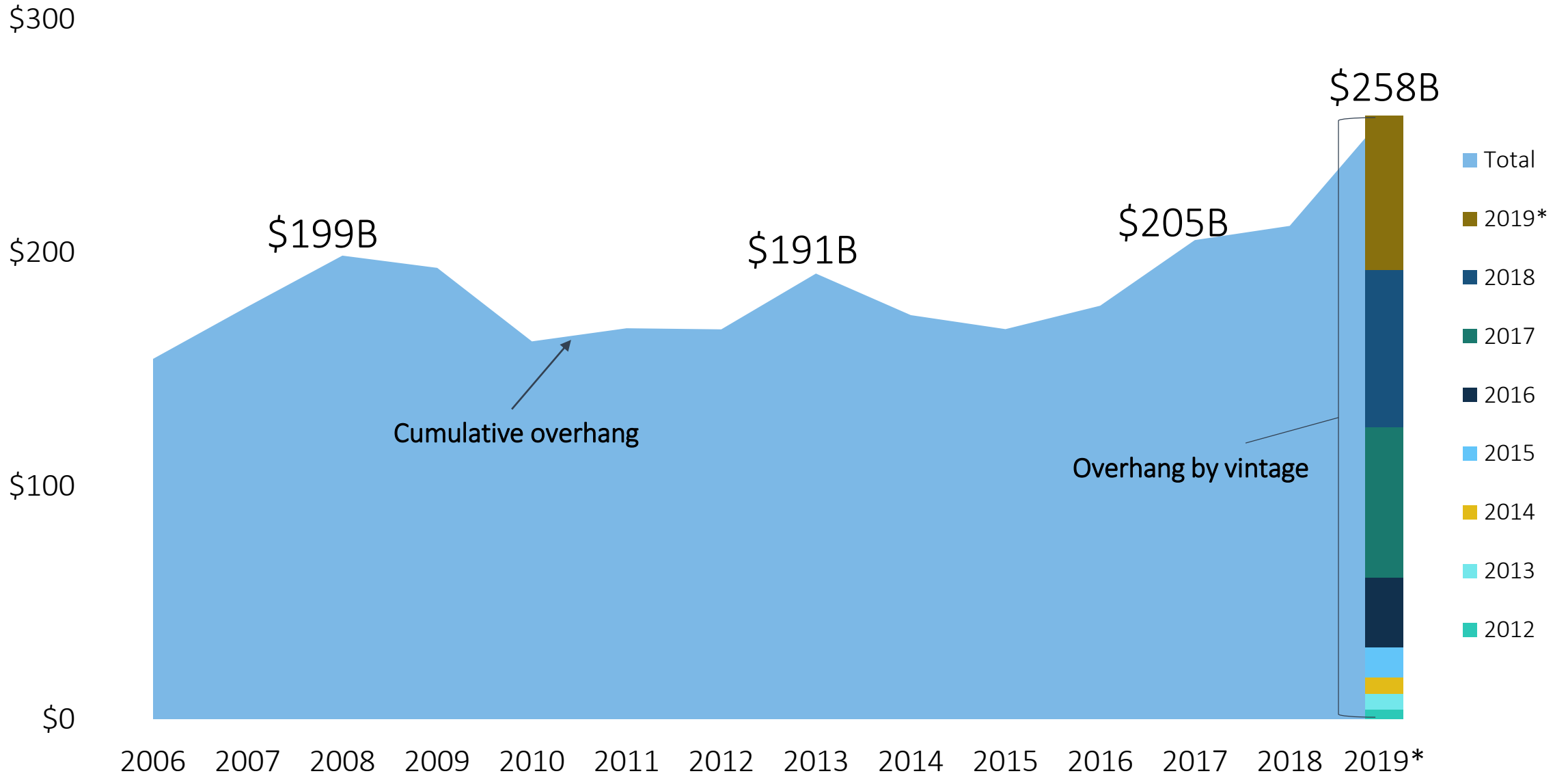
Adley Bowden, Vice President of Market Development & Analysis

European PE Cashflows

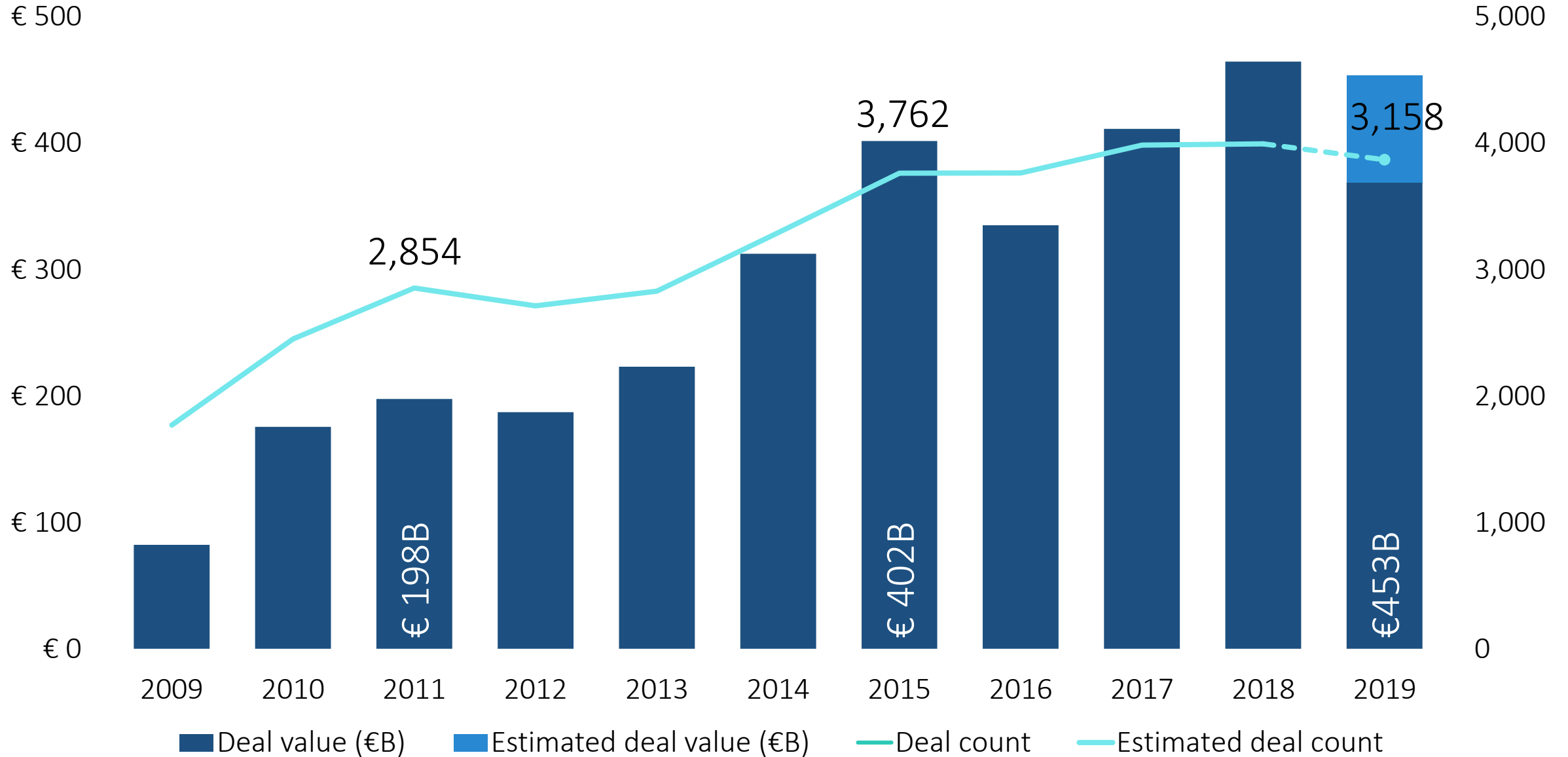


(\$100)

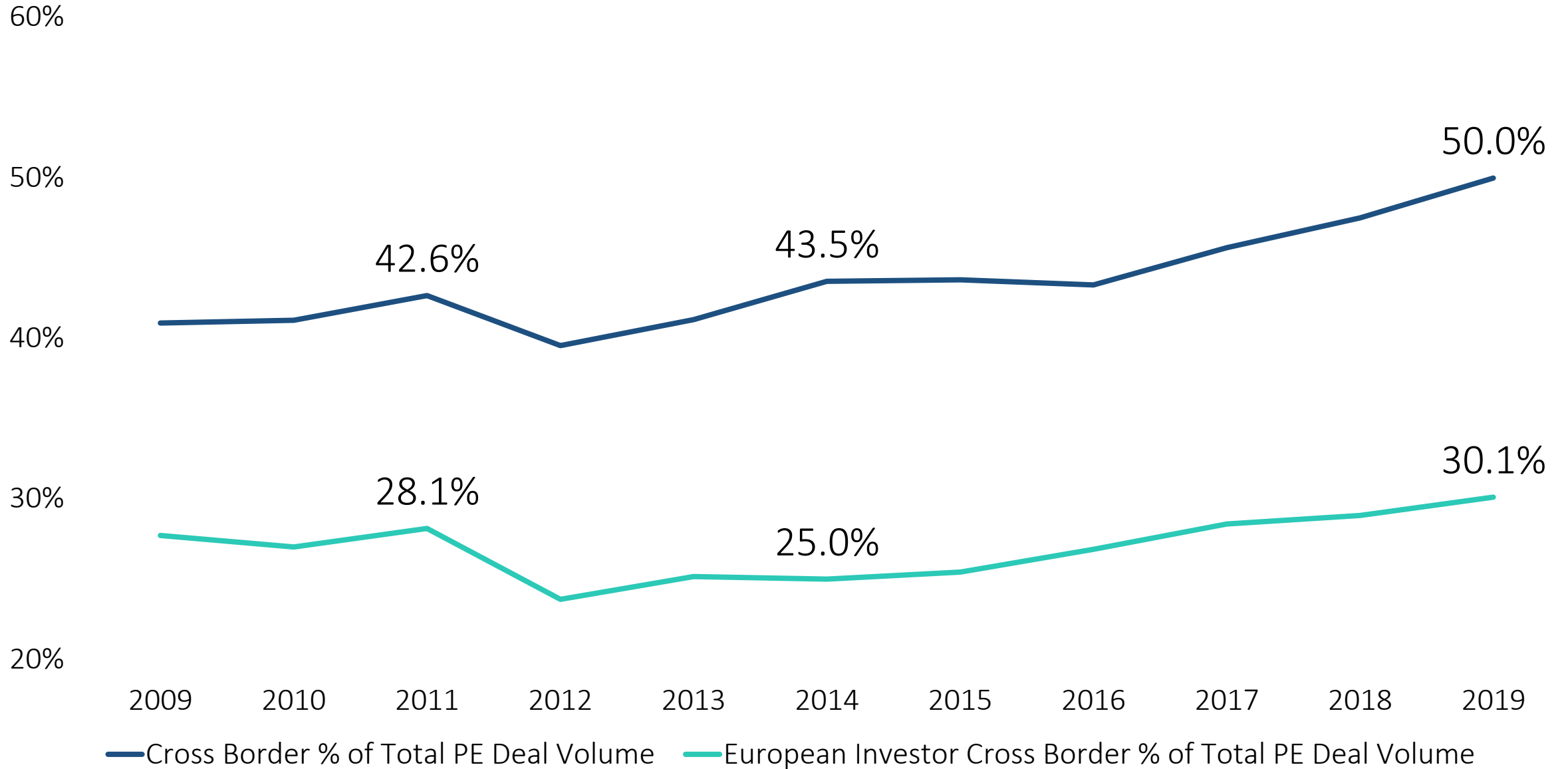
Europe PE Capital Overhang



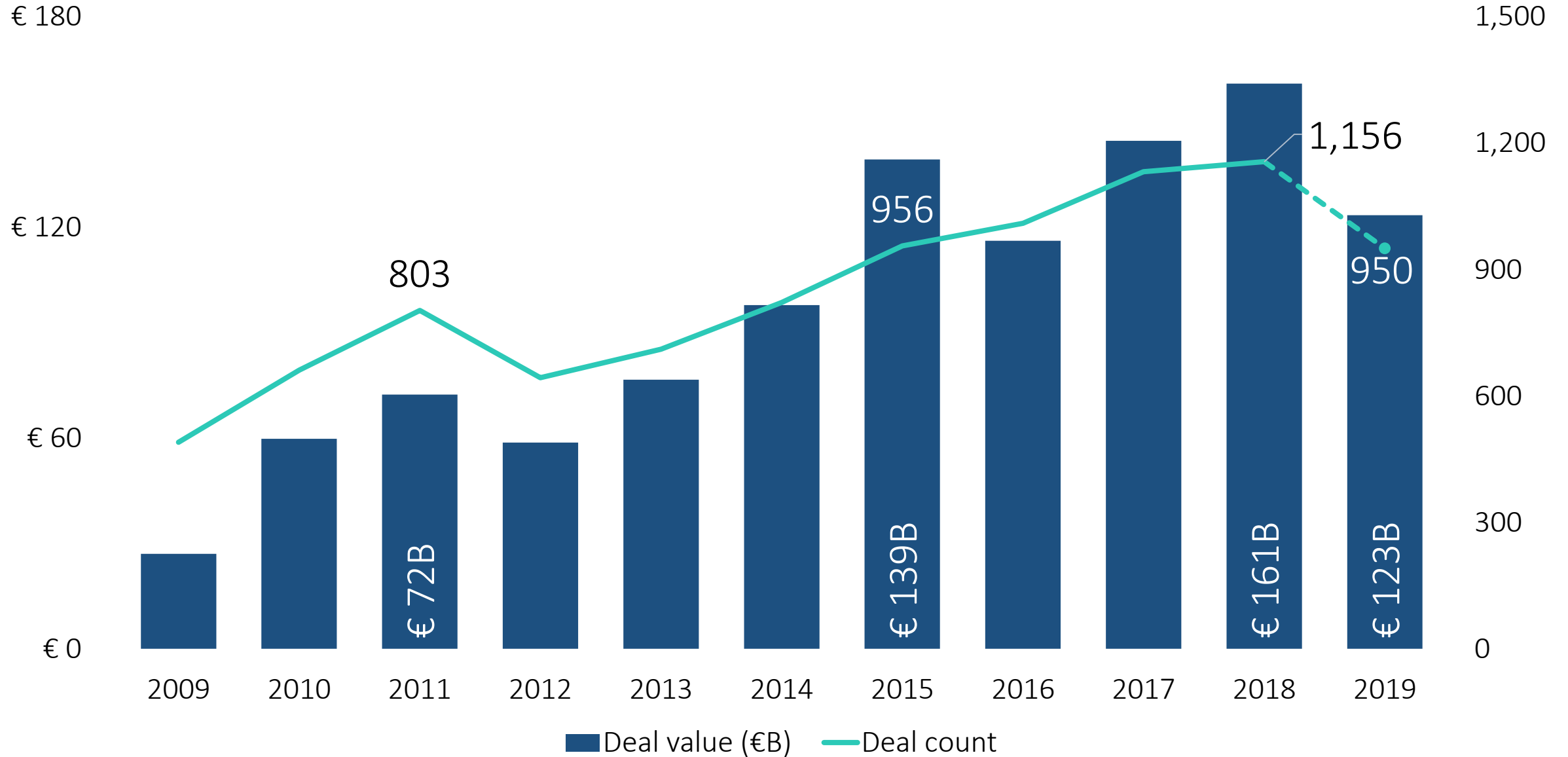
European PE Deal Flow



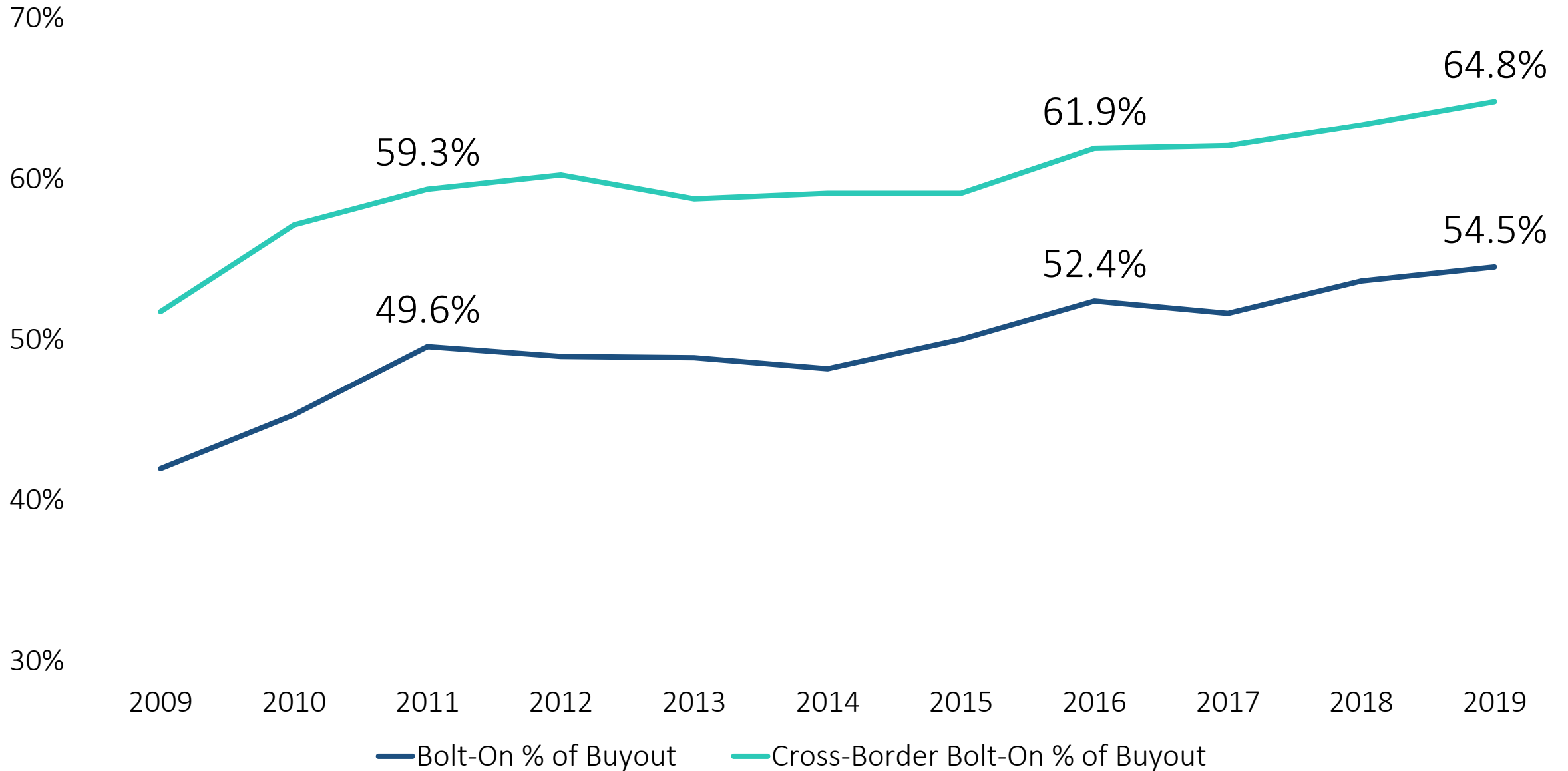
European cross-border activity % of deal volume



European deal activity with cross-border European investor participation



European Add-ons as a percentage of buyouts





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