

FID connectivity Developing data driven solutions



Total Opportunity

355

Total Opportunities YTD

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Most Active Funds YTD

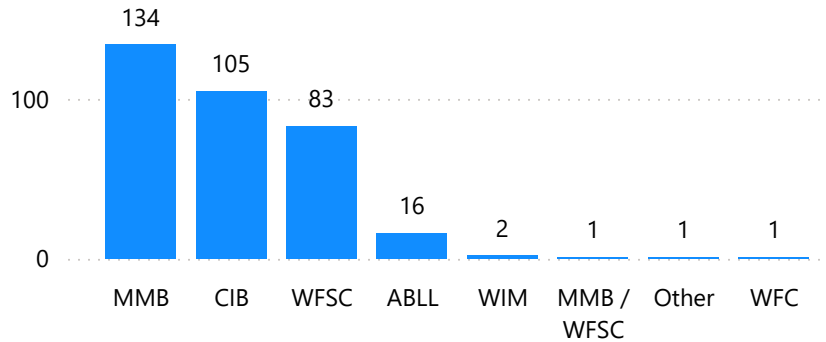
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Status	Count of Status
Active	21
Closed	160
Lost	2

LOB Opportunities YTD

YTD Opportunities by LOB

Opportunities by LOB

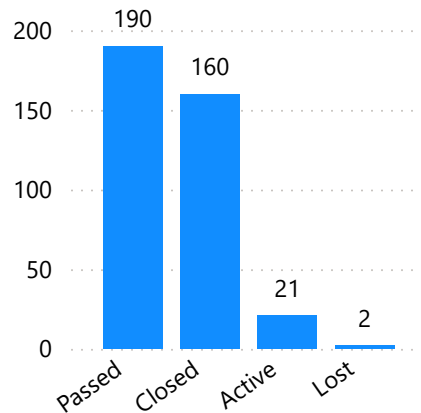


Opportunities by LOB

LOB	Count of LOB
ABLL	16
CIB	105
MMB	134
MMB / WFSC	1
Other	1
WFC	1
WFSC	83
WIM	2

Most Active Fund YTD

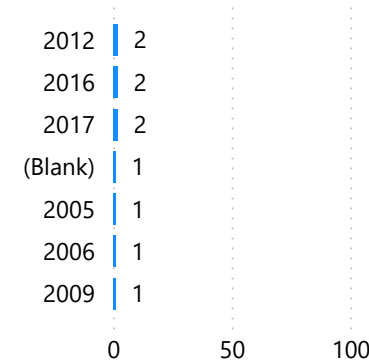
Status



Most Active Funds

Rank	Fund	Count of Fund
1	LBC	62
2	Cyprium	15
3	Boundary Street	14
4	Barings	13
4	Deerpath	13
4	Patriot	13
5	Caltius	12
5	Hamilton Lane	12
6	Five Points	11

LTM deals per month



Fund Summary

Location :

Austin ▾

TX

Tier

Fund Family

Tier :

Not in Current Fund Blue Sage

WFSC RM :

Chris Carter

Coverage Banker :

Lance Reynolds

Deal Details

Status	Date	Company	Opportunity	Referred to	Amount	Product	Comments
Active	3/13/23	Fund line of credit	MMB - Texas	Michael Friesch		TM	Reach out to Michael for update

Status	Date	Company	Opportunity	Referred to	Amount	Product	Comments
Closed	CRI		Investment Banking		50000000		August 21 Survey Response
Closed	R360	Environmental Solutions	Investment Banking		100000000		August 21 Survey Response

Deal Summary

Status	Count
Active	1
Passed	1
Closed	2

Status	Date	Company	Opportunity	Referred to	Amount	Product	Comments
Passed	8/30/21	All-State Industries	WFSC			Co-investments	



Diverse Segments Summary

Family of Fund	FID Commitment	Fund Primary Location	Diverse Segment	Primary Contact
Aldine	\$16,000,000	IL		Brian Henderson
Argosy	\$13,000,000	PA		
Avante	\$5,000,000	CA	Woman led	Kaitlyn Hull
Barings	\$10,000,000	NC	Woman - Christina Emery (I think she is a partner)	Elyn Dortch
Blue Sage	\$5,000,000	TX		Lance Reynolds
Boundary	\$5,000,000		Minority led	
Brookside	\$8,000,000	CT		Louis Gallo
Caltius	\$20,000,000	CA	Woman partner	Aron Solomon
CAPX	\$7,500,000			
Centerfield	\$7,000,000	IN	Minority	Michael Parent
Corbel	\$5,000,000			
Core	\$3,000,000		Woman partner	
Crescent	\$10,000,000			
Deerpath	\$22,000,000	NY		Shahidah Bilal
Eagle	\$6,800,000			
Five Points	\$10,000,000	NC		Tim Sechrest
GMB	\$48,000,000	MN		Zack Wachowiak
GP	\$5,000,000		Woman partner	
Graycliff	\$18,000,000	NY		Shahidah Bilal
Hamilton	\$7,500,000			
Holleway	\$3,000,000	MO	Woman led	Julie Havens
Ironwood	\$40,000,000	CT	Woman led	Louis Gallo
Kian	\$15,000,000	NC		Elyn Dortch
LBC	\$9,266,667	PA		
LCM	\$3,000,000	TX		
LNC	\$5,000,000	VA		
Maranon	\$10,000,000	IL		Brian Henderson
Merion	\$13,000,000	PA	Woman led	
MV	\$3,000,000		Minority	
New Canaan	\$7,500,000			