



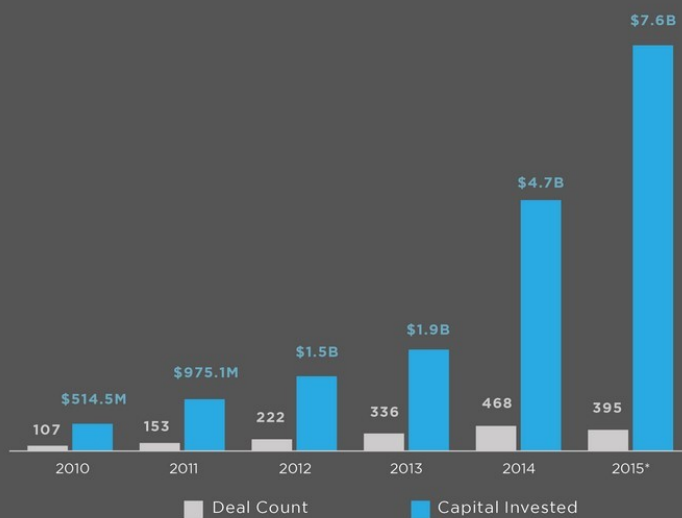
APFF
Asia-Pacific Financial Forum

Roundtable on Financial Innovation

How can we harness innovation to build bigger, robust and inclusive financial markets?

24 February 2016
Hosted by PayPal
Corporate Campus, PayPal Headquarters
Town Hall Entrance, 2161 N 1st St., San Jose, CA 95131

GLOBAL VC FINTECH INVESTMENT IN THE PAST 6 YEARS



2015 INVESTMENT BY QUARTER

1Q	Capital invested: \$1.5B Deal count: 116
2Q	Capital invested: \$1.9B Deal count: 116
3Q	Capital invested: \$3.5B Deal count: 112
4Q*	Capital invested: \$806M Deal count: 51

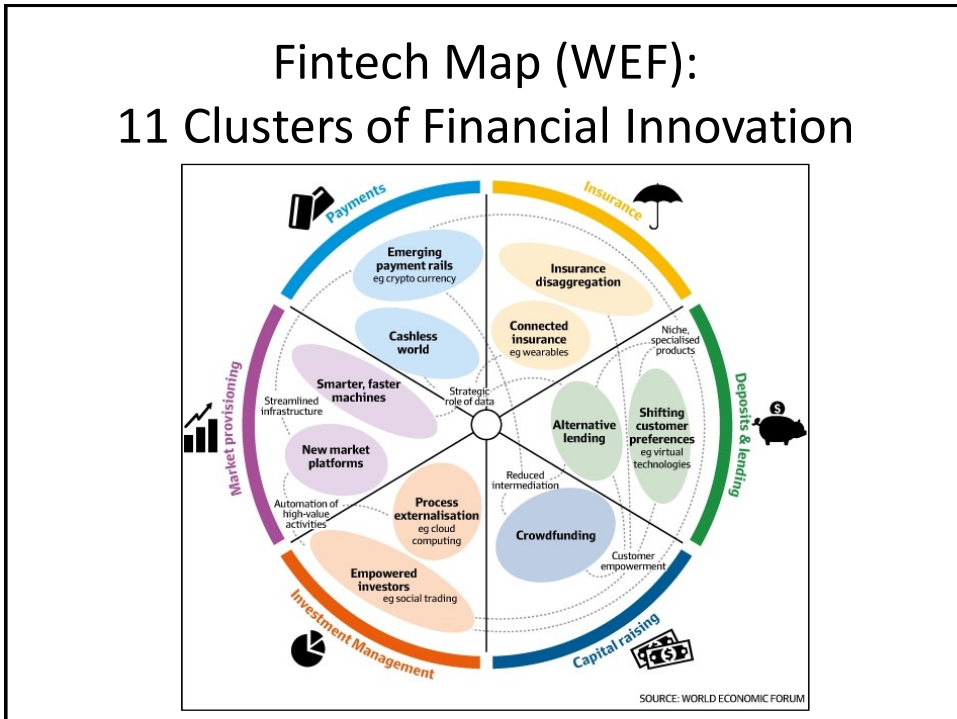
*through 11/30/2015

Source: ValueWalk

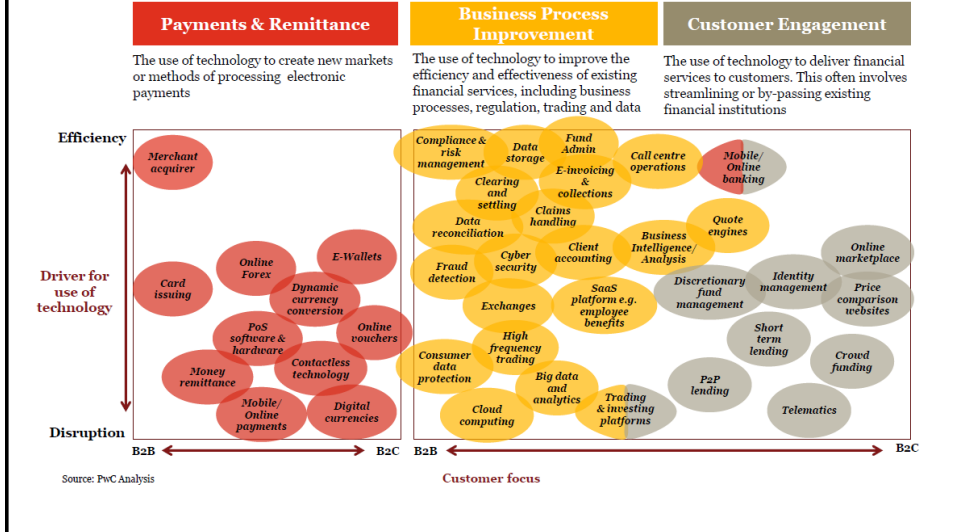
Millennials: Key Market for FinTech



Fintech Map (WEF): 11 Clusters of Financial Innovation



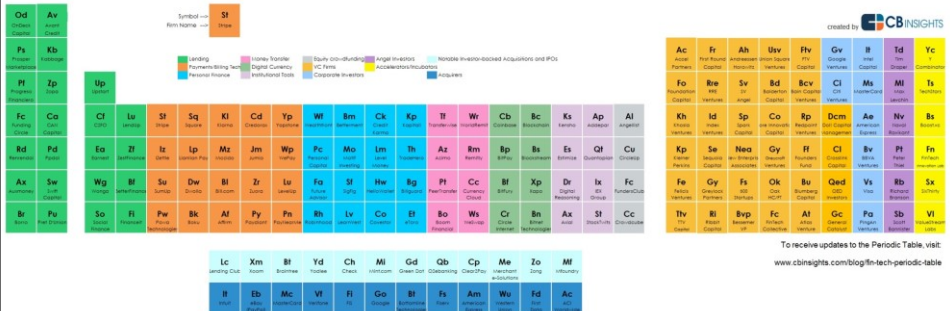
FinTech Map 2 (PwC): FinTech Market in 3 Key Areas

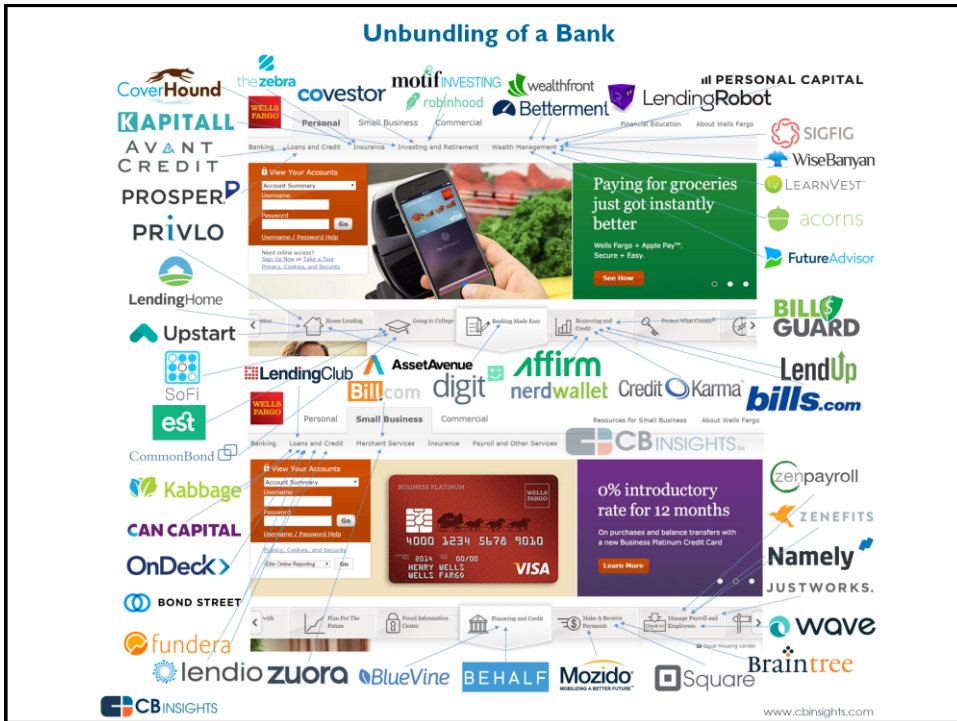


Fintech Map 3 (CB Insights): Periodic Table of Fintech

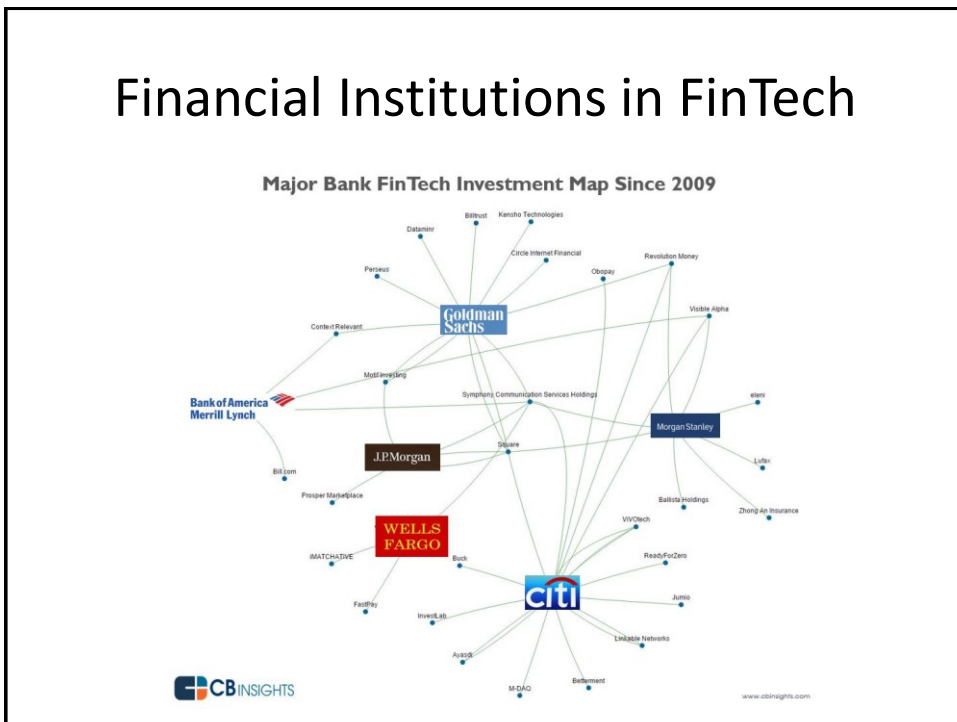
The Periodic Table of Fin Tech

An overview of key private companies, investors and strategic acquirers in the Fin Tech space

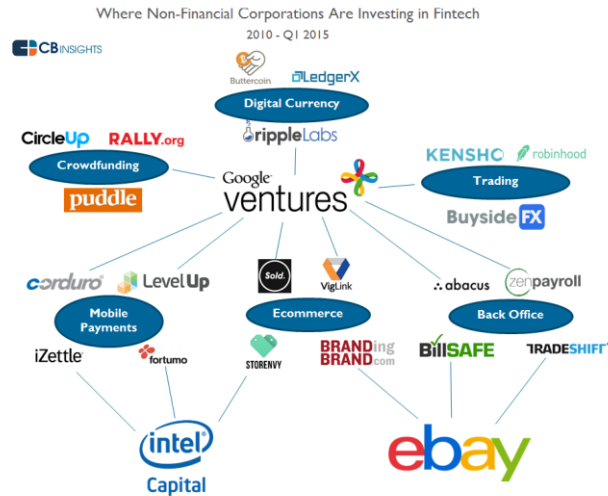




Financial Institutions in FinTech



Non-Financial Corporations in FinTech



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24 February 2016, PayPal Corporate Campus, California, USA

Session One Agenda

- **Focus:** Landscape of Financial Innovation
- **Innovation: Kabbage** – Victoria Treyger
- **Overview of the Landscape** – Menekse Gencer (PwC)
- **Panel discussion**
 - Hu Liang (State Street)
 - Michael Gardner (BNY Mellon)
 - Karim Gillani (Xoom)
 - Narciso Campos (Hacienda y Credito Publico, Mexico)
- **Open forum**
- **Summary by Rapporteur** – Amy Auster (ACFS)
- **Concluding comments**