

SOURCING INFORMATION ON ALTERNATIVE INVESTMENT-FUND TRANSACTIONS

What is Private Equity?

Private equity is an alternative form of private financing, occurring away from public markets in which funds and investors directly invest in companies or engage in buyouts. Private Equity can take on various forms, from complex leveraged buyouts to venture capital. Private Equity investments are typically available only to high-net-worth individuals. Private Equity firms are typically ranked by their assets under management and success in returning gains to investors

Project Background

PitchBook a Seattle-based company that delivers data, research and technology covering the private capital markets, including venture capital, private equity and M&A transactions. PitchBook tasked Phase Shift Labs with identifying additional sources of private-market info to supplement their robust information-architecture. Specifically, PitchBook requested publicly available, granular information pertaining to the investments made by an individual fund of an investor, known as deal-to-fund tagging.

PhaseShift Labs' Approach



Data Collection

Manually search, review, & catalog PE-related data sources



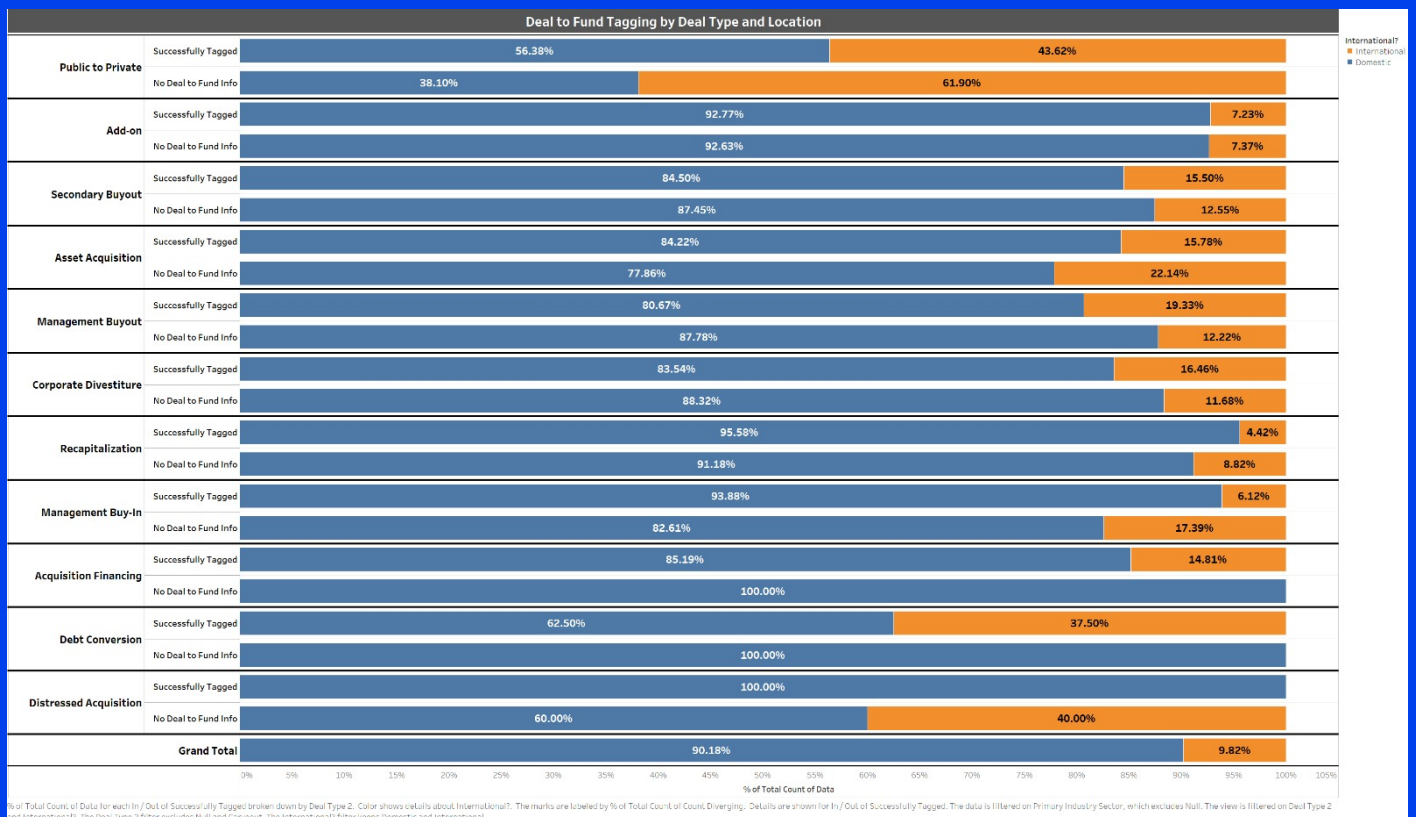
Data Analysis

Explore where PitchBook is/is not having success sourcing fund-level transactions



Sourcing & Evaluation

Identify potential sources and evaluate the scope for automation with the PitchBook team



With over 60 thousand funds, 300 thousand investors, and 1.5 million investments recorded on the platform, PhaseShift Labs needed a strategy to focus their search. It became clear to us that there is a lack of deal-to-fund information for International PE transactions.



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