



• WealthKernel, a UK-based digital wealth infrastructure provider, is planning its Series B for 2022, said Karan Shanmugarajah, CEO. (Please click on the hyperlink above to read this article)

#### **Brief Summary:**

WealthKernal's proprietary API platform provides digital wealth infrastructure, custody and regulatory permissions for companies offering savings and investing solutions.

#### Investors:

ETFS Capital, LCIF and Seedcamp

#### CEO:

Karan Shanmugarajah





#### Interesting Fact:

Right now, it is focused on expanding throughout the European Union, with the exception of Switzerland, he noted. Players in the Middle East, South America and Africa are expressing an interest in WealthKernel's services, which is interesting to the company but is likely part of its 24 to 36 month plan.



PBoosted.ai, a Toronto, Canada-based creator of machine learning algorithms for portfolio managers, is receptive to investor approaches, said Nicholas Abe, CFO/COO and co-founder. (Please click on the hyperlink above to read this article)

#### **Brief Summary:**

Boosted.ai uses artificial intelligence and machine learning to enhance investment decision making for portfolio management companies. (Founded 2017)

#### Investors

The company has raised \$11m to date and its investors include Portag3 Ventures, Dunamu & Partners and Polar Equity Partners. In May, it announced an \$8m Series A led by Portag3 Ventures

# CFO/COO and co-founder:

Nicholas Abe



# Interesting Fact:

Osler, Hoskin & Harcourt LLP advised Boosted.ai on its Series A with a team consisting of Chad Bayne, Andrew Irwin and Shalu Atwal.



Tradeteq, a London-based provider of an electronic trading platform for trade finance assets, is evaluating the timing of its next capital raise, said Christoph Gugelmann, co-founder and CEO. (Please click on the hyperlink above to read this article)

#### **Brief Summary:**

Tradeteq allows non-bank investors to expand into trade finance. It offers an electronic trading platform, Al-driven credit scoring and "Securitisation as a Service," which transforms trade finance assets into capital markets products by issuing notes via a Luxembourg special purpose vehicle, based on standardized legal agreements.

Investors:

**Accelerated Digital Ventures and GTR Ventures** 

CEO and founder: Christoph Gugelmann





Interesting Fact:

Given the current environment with the pandemic, Tradeteq is evaluating whether it makes sense to move forward with a raise this year or delay it until early 2021.





\*\*ABAKA, a London-based digital retirement solutions provider, will close on its Series B raise this year, said Fahd Rachidy, founder and CEO. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

ABAKA's SaaS platform utilizes artificial intelligence to offer digital retirement, banking, wealth and advisory solutions to global banks, financial institutions, private banks and wealth managers. (Founded 2015)

#### Investors:

The company has raised \$10m to date and its investors include Anthemis, Thames Trust, Ace&Co and Downing Ventures. It raised \$6.5m in Series A funding in January 2020.

# CEO and founder:

**Fahd Rachidy** 





# **Interesting Fact:**

ABAKA sees an IPO on the Nasdaq as a possibility for the company at some point in the future, the CEO said. Before an IPO, it would need to reach the benchmark of \$100m in recurring revenue, the executive said.

Franc, the creator of an investment app serving residents of South Africa, aims to raise an additional \$300,000 for its seed round. The company plans to start raising a Series A round at the end of next year or at the beginning of 2022. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

the creator of an investment app serving residents of South Africa



#### CEO and co-founder:

Thomas Brennan





# **Interesting Fact:**

Franc was the first robo-advisory startup in South Africa, the COO said. When Franc started, it saw the main barriers to creating new financial services products to be around product complexity and minimum investment requirements, he said.







CogniCor Technologies, the San Francisco-based AI digital assistant platform provider, has begun a fundraising round, said Sindhu Joseph, co-founder and CEO (Please click on the hyperlink above to read this article)

# **Brief Summary:**

The company provides an Al-based digital assistant platform for the financial services industry. It is mainly targeting the wealth management and insurance carrier market. Its assistant sits on top of advisors' dashboards and provides 24/7 support to streamline and reduce the amount of time spent on middle and back office tasks while also reducing call volume into call centers.

Investors: SixThirty

CEO and co-founder: Sindhu Joseph





# Interesting Fact:

CogniCor is looking to go-to-market through a few different methods including through partners who could increase the distribution of its product to a wider user base. CogniCor's current partners include BNY Mellon | Pershing, Joseph said.





Freetrade, a London-based challenger stockbroker that offers commission-free investing, could potentially raise its Series B towards the end of the year or in early 2021, said Viktor Nebehaj, co-founder and CMO. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

Freetrade offers an iOS and Android investment platform in which investors are able to invest in 1200 stocks and ETF's, commission-free via their phones.

#### Investors:

**Draper Esprit** 

# Interesting Fact:

Freetrade is targeting "everyone" as a potential customer, but it is initially focused on the 100m millennials in the E.U., Nebehaj told FHM.





Canopy (SG), a Singapore-based financial data aggregation platform, is evaluating its next capital raise for US growth, Tanmai Sharma, CEO and founder. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

Canopy's solution converts data in any file format, for any asset, in any currency including: PDF, Excel, data feeds and others for standardization to an API for itCanopy's solution converts data in any file format, for any asset, in any currency including: PDF, Excel, data feeds and others for standardization to an API for it

#### Investors:

Credit Suisse, Lionrock Capital, Dymon Asia Ventures and Seeds Capital

# CEO and founder:

Tanmai Sharma





# **Interesting Fact:**

Sharma was previously Managing Director (Credit Trading) at Deutsche Bank.





WealthConductor, a Hartford, Connecticut-based retirement income management platform provider, is seeking its next round of capital, said Sheryl O'Connor, CEO and co-founder. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

WealthConductor's retirement income SaaS platform, IncomeConductor, supports financial advisors throughout the financial planning process. (Founded 2017)

#### Investors:

The company has raised \$410K in seed capital to date.

#### CEO:

Sheryl O'Connor





# Interesting Fact:

Earlier this year, WealthConductor was scheduled for a live demo at Finovate Spring in San Francisco, but due to COVID-19, the company instead ran a virtual demo of the newly updated IncomeConductor system.





Wealthinity, a London-based wealthtech start-up, will likely begin its Series A raise this fall, said Taras Rybak, CEO and co-founder. (Please click on the hyperlink above to read this article)

**Brief Summary:** 

Wealthinity offers white-label investment solutions to small and medium-size financial advisors, wealth managers and private banks. (Founded 2019)

Investors: Fusion Group

CEO:

Taras Rybak





Interesting Fact:

Wealthinity is a spin out of Westminster-based Fusion Group, which provided the company initial seed funding of \$1.5m.



website

# **Most Recent Coverage:**

Nucoro, the London-based provider of an Al-driven wealth management platform, may pursue its Series A round in early 2021, said Melanie Palmer, CMO. (Please click on the hyperlink above to read this article)

#### **Brief Summary:**

Nucoro offers white-label wealth management products which it customizes for each client. Target customers include banks, wealth managers, IFAs, insurance providers and other financial services businesses with a minimum of 500K customers.

# смо:

Melanie Palmer





#### **Interesting Fact:**

Nucoro is the company behind Exo Investing, which raised about €16.5 million (£14.5 million) in seed capital from investors including Ariane and Benjamin de Rothschild, José Manuel Bolívar (founder of ETS) and Daniel Treves and Hugo Ferreira, heads of Edmond de Rothschild corporate finance subsidiary La Cie Benjamin de Rothschild SA, according to a Citywire report.



website

# **Most Recent Coverage:**

\*\*Valight, a Toronto, Canada-based wealth management platform, is focused on its operations for the next six months, but come summer, it will begin investment discussions, said Dan Rosen, CEO. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

dlglt is wealth management platform powered by institutional- grade analytics & risk management, according to the company. (Founded 2017)

Advisors:

Caravel Law

Investors:

Purpose Financial, Ontario Municipal Pension Retirement System (OMERS), Extreme Venture Partners, Portag3, CI Financial, Illuminate Financial Management

CEO:

Dan Rosen





Interesting Fact:

On October 1, CI Financial Corp. (TSX: CIX), a global asset and wealth management firm, announced the significant expansion of the strategic alliance with dlglt.





\*\*Twilight, a NYC-based startup which is developing an app to help young people save for a down payment on their first home, is looking to raise its first round of funding, co-founders Darren Small (CEO) and Allyson Alves (CTO) told this news service. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

Twilight's mission is to "close the housing gap" in the US by helping millennials simplify their finances and budgeting processes, Small said. It is developing a mobile application that will provide a step-by-step plan for millennials to find easy ways to save for their first home.

#### Interesting Fact:

Twilight plans to generate revenue through a tiered monthly subscription model. It is initially thinking that the base version of its app will cost users about \$8.00 per month. The company will probably not cross-sell products over its app, Small said.





Wizest, a Cleveland, Ohio-based startup which is offering a wealth management application to new investors, is soon planning to raise a seed round, CEO Axel Thibon told this news service. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

Wizest is a platform which has experienced financial advisors on one side, and new or still learning investors on the other side, Thibon said. New investors can join Wizest and build their own team of advisors, after viewing various profiles and subsequently manage their teams from the platform.



website

#### **Most Recent Coverage:**

Pinnovesta, the Tel Aviv-based company behind an Al-based Innodex platform which has a novel algorithm used to evaluate private company investment, expects to raise more capital in 2020 as it expands its investment decision-making platform to more family funds, accredited and non-accredited investors, said Keren Kay, co-founder and Chief Marketing Officer (CMO). (Please click on the hyperlink above to read this article)

#### **Brief Summary:**

The company's Al-based Innodex platform provides a novel algorithm to evaluate private company investment. Innodex enables investors to "Innodex" their different investment considerations, creating customization areas in which they can conduct a deep dive based on their experience and goals.

#### Investors:

Goren Holm Ventures, BSeed Group, Hana Rado, and Mobileye investor Yigal Tamir

# Interesting Fact:

Kay said demand for the Innodex is increasing among private investors and family offices because of the fees and occasional questions on returns provided by private equity investors and other money management funds. While stock market indices are approaching record highs this year, the appetite for private investors to enter venture-type deals early remains very high, according to Kay.





€Elsen, a Boston, Massachusetts-based company that has created a platform that makes it easier for financial institutions to access both external and internal data for creating investment strategies, could become an attractive acquisition target if it demonstrates success in its market, said Zac Sheffer, CEO and co-founder. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

Elsen is a software-as-a-service platform for financial institutions, hedge funds, mutual funds, and buy-side asset managers. Its nPlatform is simple and user-friendly, allowing portfolio managers to quickly pull and analyze important data in minutes. The platform is able to serve clients ranging from USD 10m to USD 700bn in asset size, according to Sheffer.

Advisors:

Foley & Lardner

Investors

Accomplice, Boston Syndicates (BOSS), Hyperplane Venture Capital, Launch Capital, Sequoia Strategic Advisors, and Bret Siarkowski



Responsive AI, a Vancouver-based company that operates a direct to business model that relies on artificial intelligence (AI) to provide wealth managers at financial institutions with direct, actionable insights on individual client data, recently launched a \$5m second seed round to build on the \$1.1m it had raised previously, said Meaghan Dampsey, Head of Growth at Responsive AI. (Please click on the hyperlink above to read this article)

#### **Brief Summary:**

a Vancouver-based company that operates a direct to business model that relies on artificial intelligence (AI) to provide wealth managers at financial institutions with direct, actionable insights on individual client data



Jun 28,



# **Most Recent Coverage:**

🌓 Kawa Capital Management, an Aventura, Florida-based company that created a mobile app as a means for existing investors to track current deals and to learn of new, planned investments, has backed into FinTech and attracted new investors for deals because of its tech innovation. (Please click on the hyperlink above to read this article)

an Aventura, Florida-based company that created a mobile app as a means for existing investors to track current deals and to learn of new, planned investments



website

#### Jun 06, 2019





# **Most Recent Coverage:**

PonPointe, a St. Joseph, Michigan-based company providing tools to financial services firms that help those firms effectively evaluate and communicate risks to their clients, may seek capital next year to advance its toolset, CTO Rob Harbin. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

More advisors need to answer the client's question of how much capital could I lose in a certain portfolio, compared to how much could I profit in an alternative portfolio, said Harbin.

OnPointe's "Risk Analyzer" tool matches the risk score preferred by the client to a distinct group of stocks, he added. The match is made by demonstrating to the advisor's client, for example, a portfolio of 15 stocks performed at the risk level desired for the past 10 years.



\*Tomorrow, a Seattle-based startup that has launched a mobile app letting anyone create a legal will, is now raising its Series A round, co-founder Josh Heckathorn told this news service. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

a Seattle-based startup that has launched a mobile app letting anyone create a legal will



Apr 08, 2019





# **Most Recent Coverage:**

StockQuanta, a New Jersey-based startup that uses distributed computing and real-time data science to help users select stocks and allocate wisely, is likely to need investors by July or August if everything goes according to plan, founder Ashish Gupta, told this news service. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

The company, which aims to provide transparency into the stock markets to help people invest more responsibility, was founded in November 2018 and is set to launch its StockQuanta platform in alpha by the end of April. "My goal is to bridge the gap between professional Wall Street and hedge fund investing and how Main Street invests," he explained. That means empowering investors to look for opportunities they might be missing because they can't sort and compare them manually, Gupta said.





Temotomy, a San Francisco based startup that is using Al and ML to help asset managers reduce account churn, is approaching \$4bn in overall assets that utilize its technology, CEO Patrick Beaudan said. (Please click on the hyperlink above to read this article)

#### **Brief Summary:**

Emotomy owns a suite of algorithm-based trading software, one of its applications gives early warning signals to financial advisors about when a client might be ready to leave, or to withdraw his accounts from the investment firm.

CEO:

Patrick Beaudan





# **Interesting Fact:**

Beaudan, who has a PhD in computational physics, founded the investment firm Belvedere Advisors in the San Francisco area about 15 years ago. He created portfolios that allowed family fund offices to participate in venture capital deals and hedge fund investments. As Belvedere's portfolios became accepted, more family fund offices requested the same access to financial information that typically was provided by the investment manager or hedge fund.



©Galileo Processing, a Salt Lake City-based company with offerings in prepaid payment processing, fraud detection and decision-making analytics, is breaking away from processing and is eyeing new products in crypto & wealth, according to Clay Wilkes, founder & CEO. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

a Salt Lake City-based company with offerings in prepaid payment processing, fraud detection and decision-making analytics





₱Tally, a San Francisco-based company that assists people and families in managing their
debt, likely is funded until the middle of 2020 but plans to seek to more capital as it expands,
according to Erica Dorfman, Head of Finance & Operations at the company. (Please click on the
hyperlink above to read this article)

#### **Brief Summary:**

Tally introduced an automated debt manager to a wide audience last year. The debt manager analyzes the best way for individual consumers to pay down their bills and then guides implementation of its recommendations.

# **Interesting Fact:**

The 660 credit score is the current sweet spot for Tally, added Dorfman, but as the company expands it wants to be able to offer new products to customers outside of the range it currently serves.

# nummo



# **Most Recent Coverage:**

Nummo, the Zurich, Switzerland-based designer of personal financial management software, is likely to pursue a Series A raise this year, CEO and co-founder Roi Tavor told this news service. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

Nummo's platform is designed to allow people to manage their personal finances in a single place. Consolidating personal financial information in this manner is a critical first step recommended by experts for controlling spending, the CEO said.

#### CEO:

Roi Tavor





# Interesting Fact:

Nummo's platform has been described by one user as "like Mint--but more honest," Tavor said, referring to Mint.com, a personal finance software platform owned by Intuit.



website

#### **Most Recent Coverage:**

TradingView, the Chicago, Illinois-based company that has created a social network for traders and investors, expects to apply its recent \$37,000,000 venture round to assist international expansion, said co-founder and COO Stan Bokov. At the same time, the company's rapid organic growth is expected to continue, he added. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

TradingView applies a chart-based approach to supporting investment ideas, and encourages chat among traders. Its trading community shares, critiques, and attempts to advance investment ideas presented as charts, in contrast to other sites such as Seeking Alpha.

#### Investors:

JumpCapital, Insight Venture Partners, DRW Venture





TribeVest, a Columbus, Ohio-based startup building an investment platform for small groups, is gearing up for a public launch in February, with decisions on raising capital to follow, CEO Travis Smith told this news service. (Please click on the hyperlink above to read this article)

#### **Brief Summary:**

TribeVest has developed a neutral, third-party platform where small groups can come together, form "tribes", and save money toward a future investment goal.

# **Interesting Fact:**

The company was founded in 2017 but the key moment that led to its formation took place twelve years ago when Smith and his four brothers went on a fishing trip. One night during the trip, the five brothers began talking about investing in real-estate and even forming a real-estate business together. However, they were young and hadn't saved enough individually to buy real-estate, which requires large sums of upfront capital. That night, the brothers concluded that if they each set aside a manageable monthly contribution of \$500, they would soon reach their goal. To this day, Smith and his brothers still save and invest together.



Mylo Financial, the Montreal-based creator of a financial application that helps people to invest, is in the process of raising a Series A round, according to a company source. (Please click on the hyperlink above to read this article)

# **Brief Summary:**

the Montreal-based creator of a financial application that helps people to invest



# Raise:

•	4	•	•	•	•
Date	Company	Amoun	tType	Lead	City
Nov 04	Kover	\$5 million	investment		San Francisco
Nov 02	Vlot	CHF\$1m	pre-Series A	Spicehaus, Six-Thirty	
Oct 22	RaiseNow	\$6 million	Series A+	SIX Fintech Ventures	Zurich
Oct 21	Pulley	\$10 million	Series A	Stripe	San Francisco
Oct 19	Wayflyer	\$10.2 million	Seed	QED	Dublin
Oct 15	Albo	\$10 million	Series A	Portag3	San Francisco
Oct 15	Alpaca	\$10 million	Series A	Portag3	San Francisco
Oct 14	WealthVP	\$500k	Seed	private investors	Phoenix
Oct 14	M1 Finance	\$45 million	Series C	Left Lane Capital	Chicago
Oct 06	Tipalti	\$150 million	Series E	Durable Capital	San Mateo
Sep 30	Doorvest	\$1 million	pre-seed	Mucker Capital	San Francisco

Sep 29	Rally	\$17 million	new funding	Upfront Ventures	New York City
Sep 29	Retirable	\$4 million	Seed	Vestigo Ventures	New York City
Sep 28	Ideal	\$17.7 million	Series A	Kaszeck Ventures	São Paulo
Sep 28	Smallcase	\$14 million	Series B	DSP Group	Bengaluru
Sep 23	Uncapped	\$26 million	venture round	Mouro Capital	London
Sep 22	Next Capital	\$30 million	Growth Capital growth financing	FP Credit	Chicago
Sep 22	Robinhood	\$460 million	extension Series G		Menlo Park
Sep 10	Captolis	undisclosed	strategic investment	Citi, J.P. Morgan, State Street	New York City
Sep 09	Groww	\$30 million	Series C	YC Continuity	Bangalore
Aug 31	Capchase	\$4.6 mIllion	Seed		Boston
Aug 27	PrizePool	\$4.25 million	Seed		San Francisco
Aug 25	Stratify	\$4.9 million	Seed	Madrona Venture Group	Seattle
Aug 24	Commonstock	\$9.7 millon	Seed	Mike Maples (FG), Frank Rotman(QED)	San Francisco
Aug 20	Sovos	undisclosed	Growth Capital	Hg Saturn, TA Associates	Boston
Aug 18	Moov Financial	\$5.5 million	Seed	Bain Capital Ventures	Cedar Falls
Aug 17	Robinhood	\$200 million	Series G	DI Capital Partners	Menlo Park
Aug 07	Kinder	\$592k	early stage financing		Amsterda
A	FIO www.sv.es	"-i 6:	mus soud	ALIO An mala	m Onine
Aug 06	ElGameya	"six figure round"	pre-seed	AUC Angels	Cairo
Aug 05	Sync.	£5.5 million	Seed		
Aug 04	TaxScouts	\$5.9 million	Series A	Octopus Ventures	London
Jul 30	Candis	\$14 million	Series B	Viola Ventures, Rabo Frontier Ventures	
Jul 29	Moneybox	\$4 million	Series C extension	Crowdfunding (Crowdcube)	London
Jul 29	Magnetis	\$11.6 million	Series B	Redpoint eventures	São Paulo
Jul 29	Guideline		venture funding	•	San Mateo
Jul 29	Voices of Wealth	\$1.8 million	venture funding	Crif, Gellify, B.Group	Milan
Jul 28	Siepe	undisclosed	Series A	high net worth individuals	Dallas
Jul 27	StashAway	\$16 million	Series C	Square Peg	Singapore
Jul 23	Timelineapp	\$2.3 million	venture funding		Basildon
Jul 23	Cambrian Asset Management	\$4 million	venture funding	angels/family offices	Marin County
Jul 22	Meemo	\$10 million	Seed	Saama Capital, Greycroft, Monashees, ierra Ventures	San Franciso
Jul 22	Jirav	\$ 8.3 million	venture round	Information Venture Partners	San Francisco
Jul 21	Scalable Capital	\$58 million	Series D		Munich
Jul 21	Episode Six	\$7 million	Series A	HSBC	Austin
Jul 20	FLX Distribution	\$2.5 million	Seed	RiverNorth Capital Management	Basking Ridge
Jul 20	Propel(x)	\$5.5 million	venture round		San Mateo
Jul 17	Moneybox	\$37.6 million	Series C	Eight Roads, CNP	London

Jul 14	Jul 15	Bond Financial	\$32 million	venture round	Coatue	San Francisco
	Jul 14	Pricefx	\$65 million	Series C	Apax Digital	
	Jul 13	Robinhood	\$320 million			Menlo Park
	Jul 09	Icon Savings Plan	\$3.2 million	Seed	Tom Blaisdell	
Jul 08	Jul 09	Taulia	\$60 million	capital raise	Ping An	
Jul 08	Jul 08	Oliver POS	\$3.2 million	Seed	angels	St. John's
Jul 08         Volos         \$1.3 million         Convertible Note         SidebySide EIS Fund         London           Jul 07         Envestors         £2million         Seed         SidebySide EIS Fund         London           Jul 07         Quaestor         \$5.8 million         Seed         Francisco           Jul 08         Franc         \$300k         Seed         Francisco           Jun 30         Capital         \$9 million         venture funding         AME Cloud Ventures         New York City           Jun 26         PictureWealth         \$12 million         Seed         Francisco         Perth           Jun 25         Ageras         undisclosed         strategic investment         Rabo Frontier Ventures         Copenhage n           Jun 24         Derivative Path         \$35 million         Growth Capital         FTV Capital         San Redwood City           Jun 24         HandCash         undisclosed         venture round         Vector Capital         San Francisco           Jun 18         Trove         \$35 million         Growth Capital         FTV Capital         San Francisco           Jun 18         Trove         \$25 million         Seed         Financial Solutions Lab         Los Angeles           Jun 18         Bo	Jul 08	Bukuwarang	undisclosed	pre-Series A	Quona Ventures	
Dul 07   Comment   Comme	Jul 08	Swap	\$3.3 million	Seed	ONEVC	
Jul 07         Quaestor         \$5.8 million         Seed         San Francisco           Jul 06         Franc         \$300k         Seed           Jun 30         Capital         \$9 million         venture funding         AME Cloud Ventures         New York City           Jun 26         PictureWealth         \$12 million         Seed         Perth           Jun 25         Ageras         undisclosed         strategic investment         Rabo Frontier Ventures         Copenhage n n           Jun 24         Pelanful         undisclosed         venture round         Vector Capital         Redwood City           Jun 24         Derivative Path         \$35 million         Growth Capital         FTV Capital         San Francisco           Jun 24         HandCash         undisclosed         FTV Capital         San Francisco           Jun 18         Trove         Seed         Financial Solutions Lab         Los Angeles           Jun 18         Botkeeper         \$ 25 million         Series B         Point72 Ventures         Boston           Jun 18         Brightside         \$ 35.1 million         Series B         Point72 Ventures         San Francisco           Jun 16         Brightside         \$ 35.1 million         Series A         Andreessen Horowitz	Jul 08	Volos	\$1.3 million	Convertible Note		Boston
Jul 06     Franc     \$300k     Seed       Jun 30     Capital     \$9 million     venture funding     AME Cloud Ventures     New York City       Jun 26     PictureWealth     \$12 million     Seed     Perth       Jun 25     Ageras     undisclosed     strategic investment     Rabo Frontier Ventures     Copenhage n       Jun 25     Planful     undisclosed     venture round     Vector Capital     Redwood City       Jun 24     Derivative Path     \$35 million     Growth Capital     FTV Capital     San Francisco       Jun 24     HandCash     undisclosed     FTV Capital     San Francisco       Jun 24     HandCash     undisclosed     FTV Capital     Los Angeles       Jun 18     Trove     Seed     Financial Solutions Lab     Los Angeles       Jun 18     Trove     Seed     Financial Solutions Lab     Los Angeles       Jun 18     Botkeeper     \$25 million     Series B     Point72 Ventures     Boston       Jun 17     Pagaya     \$102 million     Series D     SIC     Tel Aviv       Jun 16     Brightside     \$35.1 million     Series A     Anthos Capital     North       Jun 16     Steady     \$15 million     Series B     Recruit Strategic Partners     Atlanta	Jul 07	Envestors	£2million		SidebySide EIS Fund	London
Jun 30     Capital     \$9 million     venture funding     AME Cloud Ventures     New York City       Jun 26     PictureWealth     \$12 million     Seed     Perth       Jun 25     Ageras     undisclosed     strategic investment     Rabo Frontier Ventures     Copenhage n Redwood City       Jun 25     Planful     undisclosed     venture round     Vector Capital     Redwood City       Jun 24     Derivative Path     \$35 million     Growth Capital     FTV Capital     San Francisco       Jun 24     HandCash     undisclosed     FTV Capital     Madrid       Jun 25     Finil     \$125k     Seed     Financial Solutions Lab     Los Angeles       Jun 18     Trove     Seed     Financial Solutions Lab     Los Angeles       Jun 18     Botkeeper     \$25 million     Series B     Point72 Ventures     Boston       Jun 16     Brightside     \$35.1 million     Series D     SIC     Tel Aviv       Jun 16     Brightside     \$35.1 million     Series A     Andreessen Horowitz (a16z)     San Francisco       Jun 16     Steady     \$15 million     Series B     Recruit Strategic Partners     Atlanta       Jun 16     Steady     \$15 million     Series B     Recruit Strategic Partners     Atlanta       J	Jul 07	Quaestor	\$5.8 million	Seed		
Jun 26 PictureWealth \$12 million Seed Copenhage no national part of the perth of th	Jul 06	Franc	\$300k	Seed		
Jun 25       Ageras       undisclosed strategic investment (city)       Rabo Frontier Ventures       Copenhage n (city)         Jun 25       Planful       undisclosed venture round       Vector Capital       Redwood City         Jun 24       Derivative Path       \$35 million       Growth Capital       FTV Capital       San Francisco         Jun 24       HandCash       undisclosed       Madrid         Jun 22       Finili       \$125k       Seed       Financial Solutions Lab       Los Angeles         Jun 18       Trove       Seed       Lagos         Jun 18       Botkeeper       \$ 25 million       Series B       Point72 Ventures       Boston         Jun 17       Pagaya       \$102 million       Series A       Andreessen Horowitz (a16z)       San Francisco         Jun 16       Brightside       \$ 35.1 million       Series A       Anthos Capital       North Hollywood         Jun 16       Steady       \$15 million       Series B       Recruit Strategic Partners       Atlanta         Jun 15       TransferGo       \$10 million       Sevienture, Vostok Emerging finance, Ios Gatos       Los Gatos         Jun 10       Vendr       \$ 4 million       Seed       Craft Ventures       Boston         Jun 07       Vendr </td <td>Jun 30</td> <td>Capital</td> <td>\$9 million</td> <td>venture funding</td> <td>AME Cloud Ventures</td> <td></td>	Jun 30	Capital	\$9 million	venture funding	AME Cloud Ventures	
Jun 24 Perivative Path \$35 million Growth Capital FTV Capital San Francisco Jun 24 HandCash undisclosed Seed Financial Solutions Lab Los Angeles Jun 18 Trove Seed Financial Solutions Lab Logos Jun 18 Botkseper \$25 million Series B Point72 Ventures Boston Jun 17 Pagaya \$102 million Series D SIC Tel Aviv Jun 16 Brightside \$35.1 million Series A Andreessen Horowitz (a16z) San Francisco Jun 16 UNest \$9 million Series B Recruit Strategic Partners Atlanta Jun 15 TransferGo \$10 million Series B Recruit Strategic Partners Atlanta Jun 16 Genie \$250k pre-seed Los Genie Seventure, Vostok Emerging finance, London Jun 10 Vendr \$4 million Series B Left Lane Capital Chicago Jun 09 M1 Finance \$33 million Series B Left Lane Capital Chicago Jun 08 Pando \$8 million Series A Core Innovation Capital Jun 05 TaxProper \$2 million Series B Revew Lane Ventures Doylestown Jun 04 Powerlytics \$4 million Seed Khosla Ventures Doylestown Jun 05 TaxProper \$2 million Series B Brewer Lane Ventures Doylestown Jun 04 Powerlytics \$4 million Series B Brewer Lane Ventures Doylestown Jun 05 TaxProper \$2 million Series B Brewer Lane Ventures Doylestown Jun 05 The Small Exchange \$4 million Series B Brewer Lane Ventures Doylestown Jun 06 The Small Exchange \$4 million Series B Brewer Lane Ventures Doylestown	Jun 26	PictureWealth	\$12 million	Seed		Perth
Derivative Path   \$35 million   Growth Capital   FTV Capital   San Francisco Dun 24   HandCash   Undisclosed   HandCash   Undisclosed   Los Angeles Dun 18   Trove   Seed   Financial Solutions Lab   Los Angeles Lagos Dun 18   Botkeeper   \$25 million   Series B   Point72 Ventures   Boston Dun 17   Pagaya   \$102 million   Series D   SIC   Tel Aviv	Jun 25	Ageras	undisclosed	strategic investment	Rabo Frontier Ventures	
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	Jun 04	Powerlytics	\$4 million	Series B	Brewer Lane Ventures	Doylestown
Jun 02 Cube Wealth \$500k Series A Satyen Kothari (founder) Mumbai	Jun 03	The Small Exchange	\$4 million			Chicago
	Jun 02	Cube Wealth	\$500k	Series A	Satyen Kothari(founder)	Mumbai