



2023

Year In Review

A New Era in Prime





Celebrating Five Years of Clear Street

- Chris Pento, Sachin Kumar, and Uri Cohen co-found Clear Street
- Starts operating a clearing broker-dealer

2018



2019



YEAR 1

- Serves invitation-only prime brokerage clients
- Processes trades in U.S. equities market
- Hires securities lending team



2020



YEAR 2

- Adds U.S. options to asset class roster
- Acquires professional trading platform CenterPoint Securities
- Begins offering portfolio margin financing

2021



YEAR 3

- Grows client equity by ~250% YoY
- Raises over \$300mm in capital
- Handles over a billion dollars in trades daily



2022



YEAR 4

- Launches ALTAS (Automated Trading Locates Allocation Systems)
- Expands financing capabilities into fully paid lending
- Raises \$165mm Series B funding round
- Grows institutional sales footprint

2023



YEAR 5

- Receives strategic investment from IMC Investments
- Raises additional \$270mm in Series B funding, increasing round to \$435mm
- Acquires cloud-native futures clearing platform REACT
- Expands asset class capabilities to include fixed-income
- Begins offering investment banking services



"What we're building is bigger than Clear Street. We're bringing capital markets into the future for everyone. This is a Clear Street I'm proud to lead, and we're just getting started."

— Chris Pento, CEO and Co-Founder

Where We Are Now: 2023 at a Glance



435+ employees worldwide



3 new asset classes



3 client product launches



6000+ production releases



\$435 million raised in Series B



\$700 million in available capital



160+ new institutional clients



100+ new hires



*Clear Street has applied to become authorized and regulated by the FCA

The World is Noticing

Our team is bringing capital markets into the future. We've expanded our senior leadership team across finance and technology.



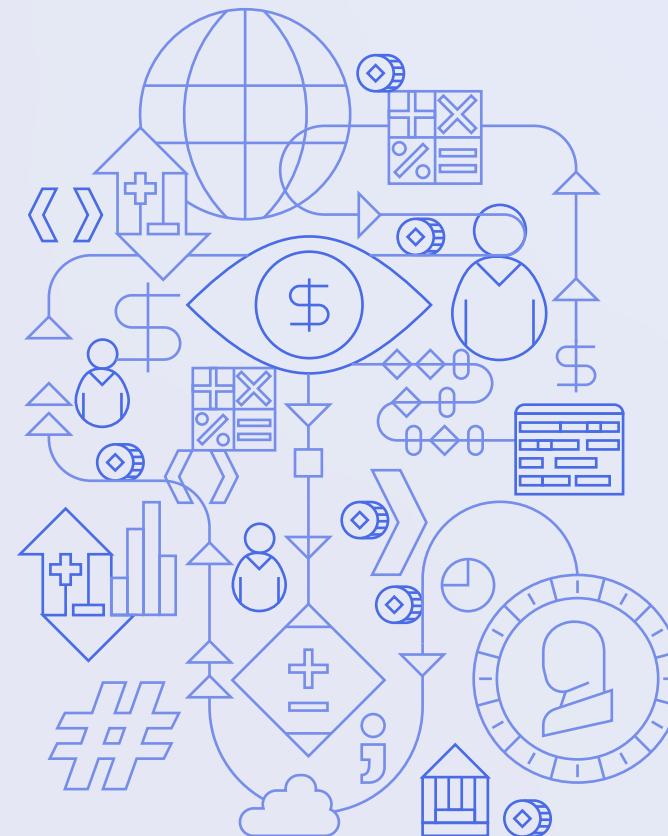
Steve Bisgay
Chief Financial Officer



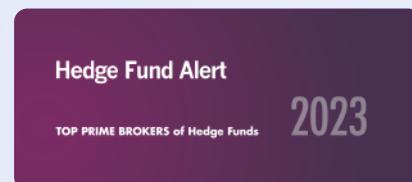
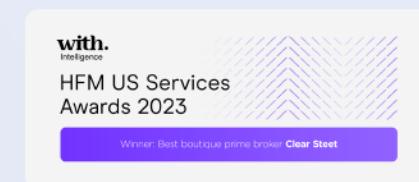
Jon Daplyn
Chief Information Officer



Kevin McCarthy
Chief Administrative Officer,
Head of Clearing



Every accolade is a testament to our employees and our culture.





New Products and Services

Clear Street Studio: A single platform for investors on a global scale.

Our flagship product. The all-in-one portfolio management platform designed with emerging managers in mind. Seamlessly access your risk and margin, exposures, P&L, and analytics reports at the tip of your finger.

Clear Street® Studio allows you to focus on growing your business. We'll handle the rest.



Futures: Coming soon

Clear Street acquired the React Consulting Services, LLC team and their proprietary, cloud-native futures clearing platform, BASIS.

"We are thrilled to join Clear Street and accelerate the company's launch into futures on the firm's proprietary, cloud-native platform."

— Dave Evans, Managing Director

Investment Banking: The next-generation investment bank.



A broad suite of financial solutions paired with Clear Street's best-in-class sales, trading, and prime brokerage platform.

Fixed Income: Serving dedicated fixed-income clients and multi-strategy investment managers.

While it can take other prime brokers years to add new asset classes, we built fixed-income capabilities on our platform in just six months.

"Launching fixed income required coordination across the business, from engineering teams to risk, clearing and custody, settlements, and securities finance. It's a testament to both the deep expertise of our subject matter experts with decades of experience in financial services and the strength of our engineering teams."

— Prerak Sanghvi, Vice President, Engineering



The Future is Bright for Clear Street

"We have tremendous confidence in Clear Street's outlook and look forward to continuing our partnership in the Company's next phase of accelerated growth."

— Matt Roberts, Co-Founder & Partner, Prysm Capital

"Our team has made incredible strides since our inception in 2018, and this additional funding is further testament to the value that we bring to our clients. Over the past year, the number of institutional clients on our platform increased by 500 percent and our daily transactional volume increased over 300 percent. We're excited to keep this momentum with support from our continued partnership with Prysm"

— Chris Pento, Co-Founder and CEO, Clear Street



We welcomed IMC as a strategic investor, supporting our mission to build better infrastructure for capital markets.

5 Year Growth in Capital



We completed the second tranche of our \$435 million Series B Funding round, bringing our total valuation to \$2 billion.



Continuing to be a Great Place to Work

At Clear Street, we operate as a team. We succeed, fail, learn, and grow together, and we strive for a workplace where everyone can show up as themselves.



4 years in a row as a Great Place to Work®

5 days of mental-health-focused activities for wellness week

9 summer interns supported Sales, Trading, Legal, IT, Operations, Compliance, and MarComms teams

53 engineers successfully solved **86** issues during **2** fix-it days

40 employees competed in our first in-office ping-pong tournament

4 company-wide happy hours and holiday celebrations

10 in-office yoga sessions

5 Clear Street Connect days with almost **100** employees

In 2023, Clear Street donated more than **\$420,000** to charitable organizations!

- Breast Cancer Research Foundation
- Camp-Make-A-Dream
- Chick Mission
- NYC FinTech Women
- Gladiator Project
- Big Brothers and Big Sisters
- A Leg To Stand On
- Women in Funds
- Holland Bloorview Kids Rehabilitation Hospital
- The Home Team
- 100 Women in Finance