



Relationship banking  
for the capital markets.

Equity transactions and debt financing  
Designated sponsoring  
Capital markets advisory  
Research  
M&A



Building  
**TRUST.**

Identifying  
**SOLUTIONS.**

Offering  
**DEPENDABILITY.**

Strengthening  
**SOLIDARITY.**

Displaying  
**PASSION.**

Bearing  
**RESPONSIBILITY.**

Enabeling  
**HONESTY.**

Evolving  
**PARTNERSHIPS.**

Demonstrating  
**PERSISTENCY.**

Delivering  
**PRECISION.**

Generating  
**MOMENTUM.**

Creating  
**INNOVATION.**

# Displaying **PASSION.**

**Since 2007, BankM is the partner of listed and non-listed SMEs (turnover < EUR 500m) at the capital markets:**

Experience from more than 40 IPOs and hundreds of capital market transactions (M&A, Debt, PE)

→ **allows the right decisions.**

Integrated interdisciplinary teams

→ **make the work efficient.**

Connections to transparent trading platforms and market access

→ **ensure liquidity.**

Equity base and risk aversion of the bank untypically high for the industry

→ **creates room for maneuver.**

Some 120,000 capital market addresses with an interest in German SMEs

→ **secure access to investors.**

Focus on core competencies

→ **creates cost advantages.**

Long-term partnerships with established market participants

→ **transport trust.**

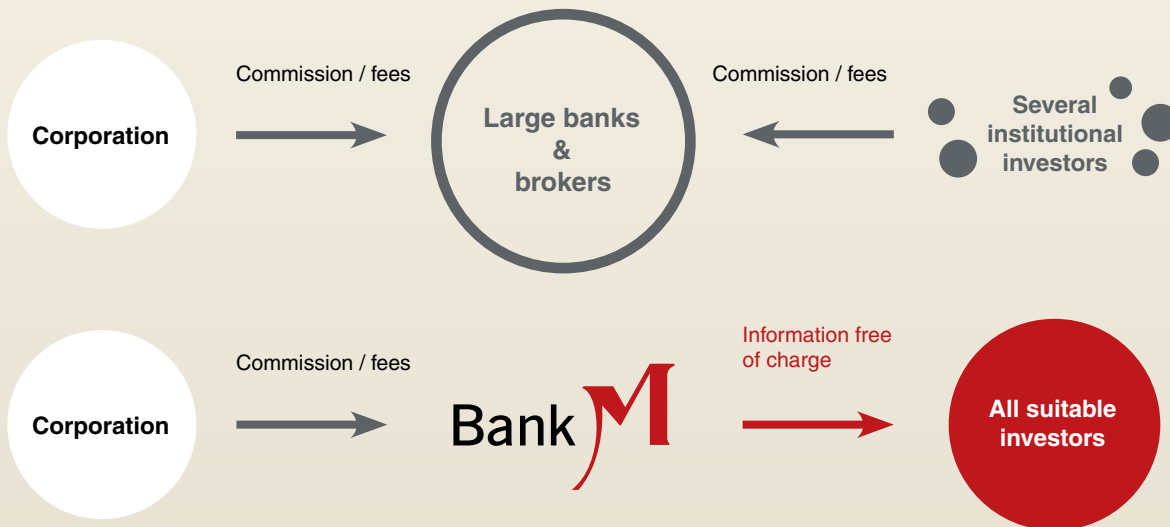
## Relationship banking for the capital markets

A stable partnership characterized by trust and transparency is crucial for us to create lasting values for issuers, investors and intermediaries and to achieve a lasting success on the capital market as a bank:

- Contrary to Anglo-American investment banking
- Conflict-free design of the triangular relationship investor-enterprise-bank
- Relation business instead of transaction business
- Consolidation of all competencies in an integrated process

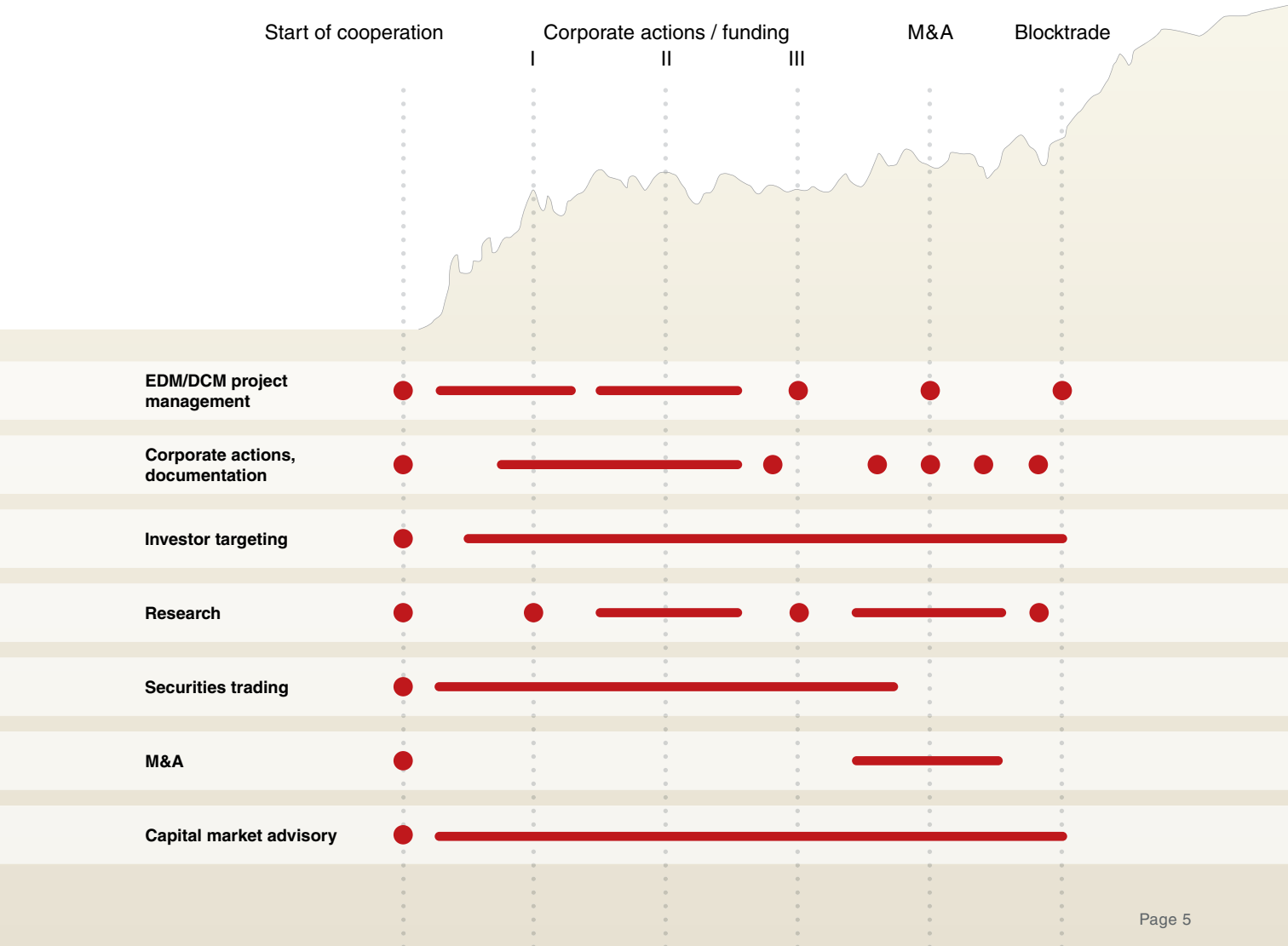
**The definition of success as a long-term is the positive development of our customers.**

No conflicts of interest caused  
by contrary objectives




# Strengthening **SOLIDARITY.**

## Integrated capital market services



# Relationship banking

	Broker	Large banks	Bank 
Own transaction & project management (ECM/DCM)	•	•	•
Own documentation (incl. prospecting process)	(•)	(•)	•
Own sales (equity & debt)	(•)	•	•
Own research	(•)	•	•
Own securities trading (a.o. designated sponsoring)	(•)	•	•
Own M&A advisory	-	(•)	•
Own capital market advisory	-	-	•
<b>Integrated team instead of individual departments</b>	-	-	•



# Identifying **SOLUTIONS.**



## **Equity**

- IPOs, listings, corporate actions, share placements
- Designated sponsoring, market making
- Venture capital & private equity
- M&A / strategic advisory expansion Asia

## **Debt**

- Credit financing
- Corporate bond & warrants
- Bonded loans
- Mezzanine capital

## **Interdisciplinary services**

- Research
- Investor services
- Capital markets advisory
- Securities settlement; payment agency

# Equity

## IPOs, listings, corporate actions, share placements

**With our wealth of experience, we are the right partner in all questions and tasks related to stock and equity financing via the stock market.**

- Pre-IPO investments / co-investments
- (IPOs / listings) and capital increases in all market segments
- Private placements and public offers
- Share placements and block trades (on and off-exchange)
- Support in organizational and legal preparation
- Preparation of a comprehensive securities prospectus / assumption of liability
- Communication and coordination with the relevant authorities (BaFin, Boerse)
- Collaboration with market-leading online banks in the retail sector
- Active marketing by qualified multipliers







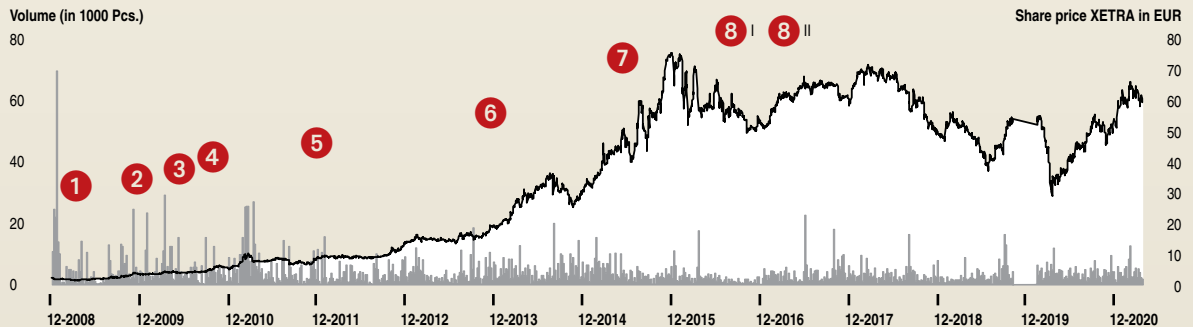
## CASE STUDY

## All for One Group SE

Capital markets advisory, share buy-back, share placement / Prime Standard

- Leading SAP full-service providers for small and medium enterprises in German-speaking countries, revenue around EUR 355 m in 2019/20
- All for One is a one-stop-shop for all SAP-related services and reliable general contractor mid-sized enterprises. Around 1,400 employees and over 2,000 clients among machinery and equipment manufacturers, automotive suppliers, consumer goods industry, technical wholesalers and project and engineering service providers
- BankM is the company's capital market partner since 2008, servicing All for One with Designated Sponsoring, Road shows and Research
- Regular capital market communication and targeted road shows
- Share buy-backs and public tender offers in the years 2009 and 2010, redemption of the shares in 2011
- Business growth in line with the development of SAP, Buy & Build strategy with the successful acquisition and integration of Steeb Anwendungssysteme GmbH in 2011, transforming into the number 1 in the German-speaking market
- Significant increase in the share price and EUR-trading volume, increased investor interest based on higher market capitalization
- Secondary share placements in 2016 and 2017 with a total volume of EUR 33 m with the aim of widening the base of investors and increasing of the free float

### Share price development All for One Group SE



- |                           |  |
|---------------------------|--|
| 1 Start of BankM services | 5 Acquisition of Steeb Anwendungssysteme GmbH  |
| 2 Share buy-back          | 6 Positive operational development after Steeb acquisition and continuation of the growth path           |
| 3 Public tender offers    | 7 Increased investor interest based on higher market capitalization                                      |
| 4 Start Research by BankM | 8 Secondary share placements I&II: Increase of the free float, with the aim of inclusion into the TecDAX |

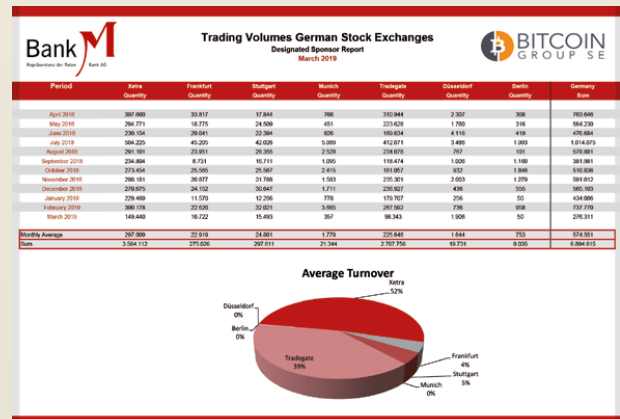
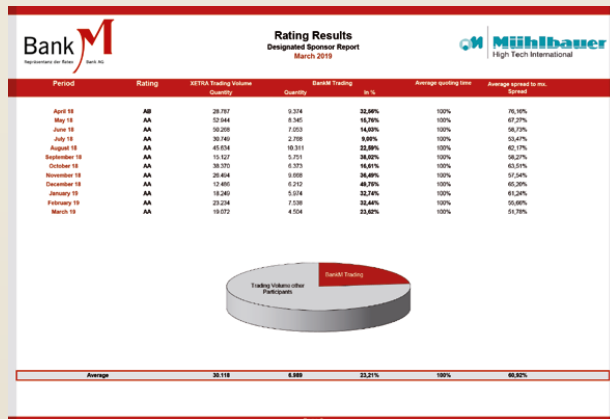
# Generating MOMENTUM.

Equity

## Designated sponsoring

As one of the largest designated sponsors on the Frankfurt Stock Exchange, we ensure our corporate clients a liquid stock trading by placing binding purchase and sale prices. Our additional services also provide true value to any company regardless of company size or industry sector.

- Permanent presence in the order book
- Reduction in default spreads
- AA rating
- No quote machine
- Active personal support
- Clear contact persons
- No order execution or commission business
- No risk transfer to the issuer
- Holding of overnight positions
- Adjustment of market imbalances
- Advanced liquidity procurement (regional stock exchanges)
- Support of liquidity in “fast market” situations and if performance measurement is suspended
- Additional services (analyst meetings, capital market conferences, etc.)



Services	DS-Pure	DS-Plus	DS-Premium
Continuous trading on XETRA	●	●	●
Market screening	●	●	●
Equity markets coaching	-	●	●
Investors update	-	●	●
Road shows	-	(●)	●
Research	-	-	●

## BankM as designated sponsor

### Without designated sponsor / floor trading only

Stock exchange	Bid	Bid Volume	Ask Volume	Ask
Fankfurt	3.500	500	500	3.700
Munich	3.500	280	280	3.700
Stuttgart	3.500	280	280	3.700

Without designated sponsor there is no trading on XETRA.

Non-binding Bid / Ask limits

Frankfurt, Munich, Stuttgart, ...  
No order depth / low transparency

### With designated sponsor / XETRA trading additionally

Bid Counterpart	Bid	Bid Volume	Ask Volume	Ask	Ask Counterpart
1	3.561	112	2,000	3.585	1
1	3.560	2,000	1,421	3.590	1
2	3.556	200	1,944	3.599	1
1	3.550	1,546	6,000	3.600	4
2	3.540	709	2,000	3.614	1
3	3.530	5,000	800	3.628	1
5	3.520	6,600	367	3.641	1
1	3.500	7,300	5,000	3.650	1
4	3.470	1,000	2,550	3.700	2
1	3.400	1,031	124	3.790	1

Binding and executable order sizes  
Enhanced liquidity  
Transparent order depth  
Close spreads (incl. spreads at other exchanges)

## Mergers & Acquisitions (M&A)

**We advise our customers as an independent and entrepreneurial partner with the experience of more than 50 transactions in all questions of the structuring and execution of company acquisitions and sales as well as on strategic issues with regard to the expansion to Asia.**

- Advising on mergers & acquisitions and company sales in the context of growth strategies, succession arrangements or restructuring
- Monitoring throughout the entire process, from strategy development to target search and negotiation to contract signing and beyond
- Integrated offer including partner search, financing and capital market access
- Strong network of industry experts and external service providers
- Strong mid-market experience and long-term contacts with a large number of companies and their management in the Germany-speaking area
- Five-headed China Desk supports expansion into Asia and the search for strategic partners; robust network to enterprises, investors and political decision-makers increases transaction security and operational success
- Co-operation with one of the world's leading networks of legally independent auditors, tax and business consultants with 440 locations in 150 countries and extensive know-how from a multitude of international cross-border transactions



CASE STUDY

**flatexDEGIRO AG**

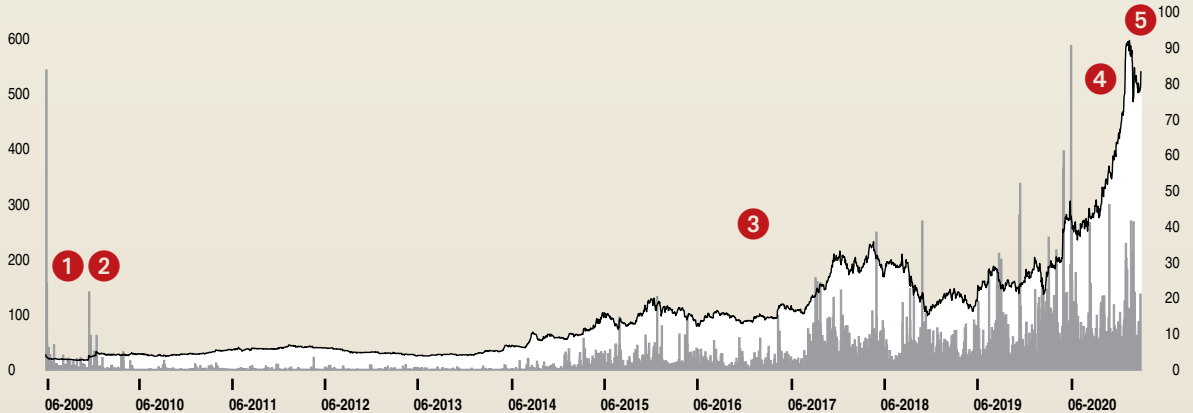
Capital markets advisor, listing agent & underwriter / Prime Standard

- flatexDEGIRO AG operates one of the leading and fastest growing online brokerage businesses in Europe.
- As long-standing Capital Market Partner of the technology group for many years, BankM successfully listed flatex DEGIRO on the Regulated Market / Prime Standard in October 2020.
- In addition to the responsibility for the admission and listing of the shares as Listing Agent, BankM acted as an Underwriter for the transaction.
- Market capitalization of flatexDEGIRO is around EUR 1.2 billion.
- flatexDEGIRO was subsequently admitted to the SDAX as early as December 2020.
- flatexDEGIRO became first pan-European online broker traded on the Prime Standard of the Frankfurt Stock Exchange, the segment with the highest requirements in Europe in terms of transparency and post-admission obligations.



**Share price development flatexDEGIRO AG**

Volume (in 1000 Pcs.)



Share price XETRA in EUR

- |   |  |
|---|--|
| ① Listing on the Open Market  | ④ Uplisting to Regulated Market / Prime Standard |
| ② Start of capital market support by BankM in Entry Standard segment      | ⑤ Admission to SDAX                              |
| ③ Change to Scale segment & start Capital Market Partner support by BankM |  |

## CASE STUDY

### **FREQUENTIS AG**

IPO, Capital markets advisory / General Standard

- Frequentis AG, a technology company founded in Vienna in 1947, stands for solutions that make the world a safer place.
- As an internationally active provider of communication and information systems for control centers with safety-critical tasks, the Frequentis Group develops and markets tailor-made „Control Centre Solutions“ in the areas of Air Traffic Management (for civil and military aviation) and Public Safety & Transport (for police, fire brigades, rescue services, shipping and rail).
- Frequentis approached BankM in 2017 in order to further advance the transformation from an owner-managed to a management-driven company and secure the financial independence and flexibility of the group in the long term via an IPO.
- BankM intensively prepared the IPO of Frequentis AG in the on the Regulated Market (General Standard) of the Frankfurt Stock Exchange and on the Regulated Market (prime market) of the Vienna Stock Exchange for around one and a half year in a risk-averse structure in order to immunize the IPO from unfavorable market conditions.

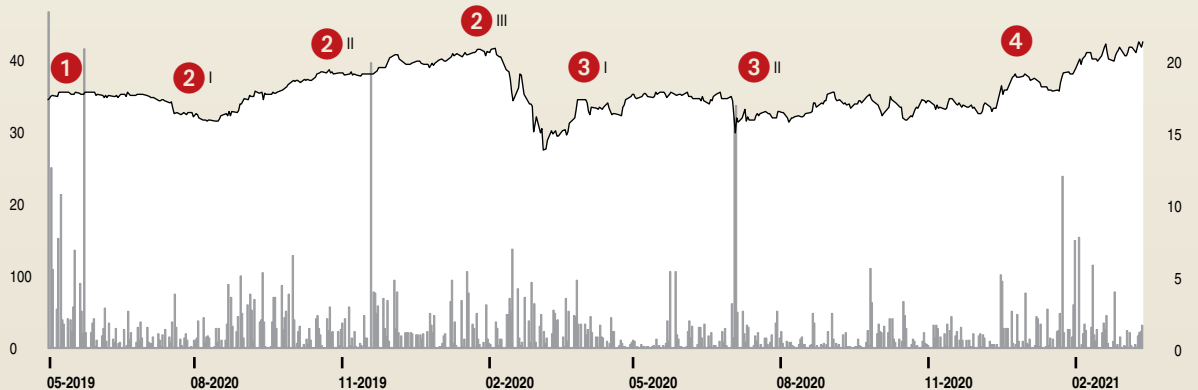


- The successful project was based on the EUR 18 million pre-IPO placement preceding the public offering accompanied by the company's high transparency towards investors and media as part of the IPO roadshow.
- Within a pre-IPO placement in 2018/2019 and the public offering in May 2019, a total volume of around EUR 70 million was placed with institutional and private investors.
- Market capitalization of Frequentis is around EUR 220 million.
- BankM acted as Joint Global Coordinator and Joint Bookrunner together with Commerzbank AG at the IPO.

## Share price development FREQUENTIS AG

Volume (in 1000 Pcs.)

Share price XETRA in EUR



1 IPO, issue price EUR 18.00

2 Active post-IPO management by BankM

3 Crisis communication & investor relations

4 Increased investor interest through investor targeting & IR





**SUPPORT**  
beats promise.



# Creating **INNOVATION.**



## Equity

### **Venture capital & private equity**

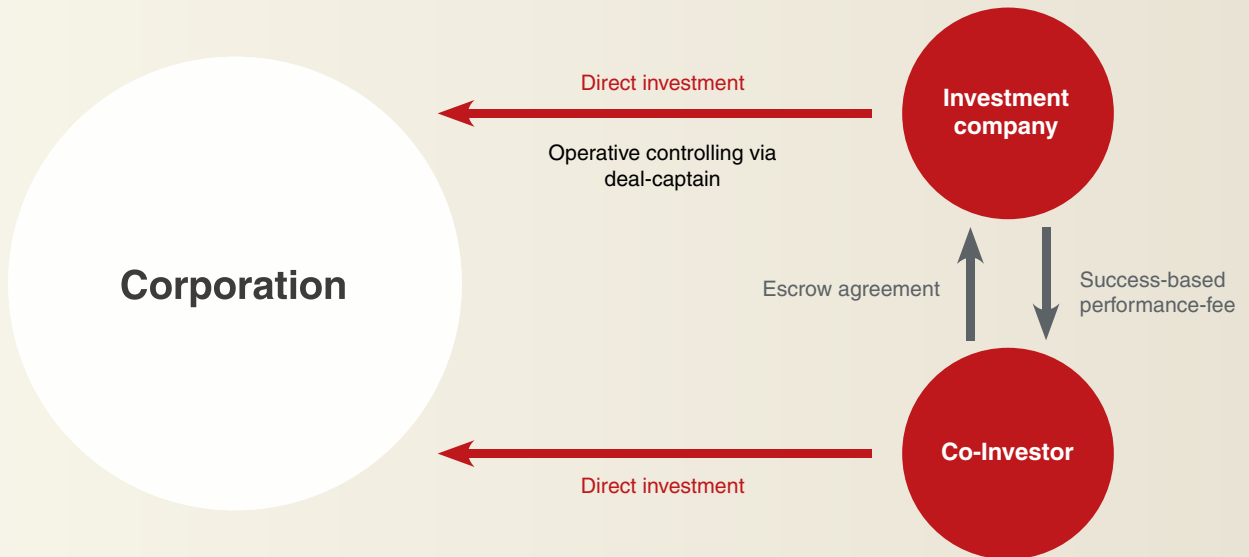
**The demand for direct participation in young companies outside the stock exchange is growing steadily, but standardized offers from banks and asset managers are passing by. BankM offers intelligent investment models and proven networks.**

- Direct investments in interesting growth companies on the basis of attractive valuations
- Co-investments within reliable networks with industry-oriented deal-captains
- Cooperation with investment companies, universities and high-net-worth private investors
- Thought-out structures ensure the congruence of all parties
- Fair performance fee instead of expensive and performance-independent fees as with standardized products
- Industry focus on deep-tech areas such as ICT, IoT, Smart Grids, Sensors, Semiconductors, MEMS, Mechatronics, Robotics and Material Science as well as MedTech, Life Sciences and Pharma



Equity

**Intelligent structure ensures alignment of interests**



## Debt

**It is crucial to finance opportunities and risks with the right tools. Within the framework of BankM's relationship banking principle, we also offer companies comprehensive solutions for borrowing capital. In doing so, we rely on a flexible, product-independent offer that minimizes the time and financial costs on the company side. Our ambition is to find the best strategic solution for your company.**

- Mediation of loans or loans (first / subordinated) by domestic and foreign banks as well as bank-independent institutional investors
- Structuring and placement of corporate and convertible bonds
- Special fund for the provision of mezzanine capital for property values
- 3-stage process from pre-sounding, structuring / documentation and mediation of the leverage in order to keep the process as slim and cost-effective as possible
- Transfer of the technical processing (payment function, securitization, coordination of the drawing process, exchange entry)
- Extensive investor access via partnerships and modern IT and data technology ensure increased placement power and tradability
- The target group is medium-sized companies with a debt financing requirement of between EUR 10-100 million and a positive development perspective (investment-grade rating is not binding)

Offering  
**DEPENDABILITY.**

## Debt

### Case studies

- Since mid-2017, BankM has supported more than 100 debt transactions with a total volume of more than EUR 800 million in various functions.
- BankM's offering ranges from traditional bearer bonds to bonds with warrants and convertible bonds, zero bonds and mezzanine capital, the brokerage of traditional bank loans, the technical processing of securitisation and subscription services and the assumption of paying agent functions.
- With twelve bond issues and deals totaling around EUR 300 million, BankM has been one of the market leaders in the SME bond segment in Germany over the past two years.

### Recent transactions

<p>8.5% corporate bond 2020/2025, EUR 15m</p> <p>Settlement agent Open Market 06-2020</p> 	<p>4.0% convertible bond 2021/2026, EUR 5m</p> <p>Lead manager Open Market 05-2021</p> 	<p>7.0% corporate bond 2020/2025, up to EUR 20m</p> <p>Global coordinator and sole bookrunner Open market 11-2020</p> 	<p>5.5% corporate bond 2019/2024, up to EUR 25m</p> <p>Global coordinator and bookrunner Scale 11-2019</p> 	<p>7.75% corporate bond 2019/2025, up to EUR 30m</p> <p>Global coordinator and bookrunner Freiverkehr / 10-2019</p> 	<p>Increase of 6.0% corporate bond 2018/2023, EUR 20m</p> <p>Global coordinator and bookrunner Freiverkehr 07-2019</p> 
<p>Increase of 7.0% corporate bond 2017/2022, EUR 40m</p> <p>Global coordinator and bookrunner Open Market / 05-2019</p> 	<p>6.0% corporate bond 2019/2024, EUR 25m</p> <p>Global coordinator and bookrunner Open Market 04-2019</p> 	<p>Increase of 8.5% corporate bond 2018/2023, EUR 100m</p> <p>Global coordinator and bookrunner Open Market / 03-2019</p> 	<p>Securization of 28 zero bonds for german real estate developers in a total volume of &gt;EUR 66m</p> <p>Settlement agent &amp; paying agent Non Public / 06-2018</p> <p>Zero Bonds</p>	<p>7.0% corporate bond 2017/2022, EUR 50m</p> <p>Global coordinator and bookrunner Open Market 09-2017</p> 	<p>7.1% corporate bond 2016/2021, EUR 15m</p> <p>Selling agent Open Market 11-2016</p> 



## Interdisciplinary services

### **Investor services**

**Our Corporate Markets team has contacts with almost all relevant international investor groups and supports you in addressing new and assisting existing shareholders.**

- Strong contacts with all relevant investor groups (investment funds, private wealth managers, asset managers, insurance companies, family offices)
- Organization of individual roadshows in Germany, Austria, Switzerland, France, Great Britain, Luxembourg and Asia
- Follow-up of investor meetings in the context of regular feedback discussions
- Regular update of interested and invested investors
- Support at capital market conferences or other investor meetings
- BankM Zoom events for investors at the issuer's premises

Bearing  
**RESPONSIBILITY.**

## Interdisciplinary services

### Capital markets advisory

**The demands on the capital market have become increasingly complex in recent years. To make sure you do not make any mistakes, we will be happy to provide you with our expert know-how for all questions concerning the capital markets.**

- Development of a general communication line and formulation of sustainable targets
- Development of a long-term capital market strategy and coordination of the equity story
- Preparation of a capital market calendar and support for capital market conferences
- Advice and support for the fulfillment of follow-up obligations
- Assistance in the application of laws and regulations of securities exchanges
- Support in the preparation of investor presentations
- Feedback on the company's IR appearance on the internet
- Support in answering shareholder and / or press inquiries
- Capital Market Partner for shares and corporate bonds in the SME segment  
Scale of the Frankfurt Stock Exchange
- Emission experts at the Bavarian Stock Exchange Munich in the SME  
segment m:access



Perspektiven für den Mittelstand.  
**m:access**



# Demonstrating **PERSISTENCY.**

## **Securities settlement**

**The integration into the banking and regulatory structures of FinTech Group Bank AG allows efficient and customer-oriented technical settlement in almost all areas.**

- Introduction into exchange trading
- Capital increases & capital reductions
- Share placements & share buy-backs
- Securitization of shares, bonds, dividend-right certificates or convertible bonds in Germany and Switzerland
- Employee participation programs
- Takeover offers and squeeze-outs
- Arrangement of the payment agency in Germany and Switzerland



# Building TRUST.

*„Distinguished by a wealth of experience in all types of equity market services and therefore always the right sparring partner, even in challenging situations.“*

**Stefan Land**

Member of the management board / CFO, All for One Group SE

*„In 2019, BankM has not only given us the confidence that the IPO will take place, but has also provided us with imaginative and energetic support to continue along the path we have chosen despite all the difficulties. Even after the successful IPO, BankM remains a trusted partner at our side.“*

**Sylvia Bardach**

Former member of the management board / CFO, FREQUENTIS AG

*„Our IPO in 2005, several capital increases, road shows, investor conferences and more! We are always convinced by the high competence of the consultations of a motivated and cooperative team.“*

**Jörg Polis**

CEO ifa systems AG

*„I joined the supervisory board of BankM because I like their very unique value proposition and their long term perspective. This is truly rare in the investment banking arena.“*

**Ohad Finkelstein**

Entrepreneur and businessperson, Founder of Danli Capital Ltd., Crescent Point Group and Marker Financial Advisors Israel Ltd.

Mr. Finkelstein is on the board of 15+ other companies.

*„Inspiring, trustworthy and sincere professionals; advice and recommendations we trust.“*

**Bernd Brinkmann**

CEO EHLEBRACHT HOLDING AG




Evolving


**PARTNERSHIPS.**



<p>8.5% corporate bond 2021/2026, EUR 250m</p> <p>Settlement and selling agent Open Market 06-2021</p> <p></p>	<p>4.0% convertible bond 2021/2026, EUR 5m</p> <p>Lead manager Open Market 05-2021</p> <p></p>	<p>7.0% corporate bond 2020/2025, up to EUR 20m</p> <p>Global coordinator and sole bookrunner Freiverkehr 11-2020</p> <p></p>	<p>Admission of shares &amp; uplisting</p> <p>Listing agent and underwriter Prime Standard 10-2020</p> <p></p>	<p>Capital increase from company funds</p> <p>Lead manager Prime Standard 08-2020</p> <p></p>	<p>Designated Sponsoring Prime Standard since 06-2020</p> <p></p>
<p>Designated Sponsoring Capital Market Partner</p> <p>Scale since 01-2020</p> <p></p>	<p>5.5% corporate bond 2019/2024, up to EUR 25m</p> <p>Global coordinator and bookrunner Scale 11-2019</p> <p></p>	<p>IPO</p> <p>Joint Lead Manager and Joint Bookrunner, Prime Market / Vienna Stock Exchange General Standard 05-2019</p> <p></p>	<p>Increase of 6.0% corporate bond 2018/2023, EUR 20m</p> <p>Global coordinator and bookrunner Freiverkehr 09-2018/07-2019</p> <p></p>	<p>7.0% Corporate bond 2017/2022, EUR 80m</p> <p>Global coordinator and bookrunner Open Market 07-2017/04-2018/05-2019</p> <p></p>	<p>8.5% Corporate bond 2018/2023, EUR 125m</p> <p>Global coordinator and bookrunner Open Market 03-2018/03-2019</p> <p></p>
<p>IPO</p> <p>Lead manager Scale 11-2018</p> <p></p>	<p>Public tender offer</p> <p>Sole lead manager Prime Standard 05 &amp; 07-2018</p> <p></p>	<p>Placement of existing shares</p> <p>Co-lead &amp; co-bookrunner Prime Standard 06-2017</p> <p></p>	<p>Placement of line of credit</p> <p>Global coordinator Non-Public 12-2016</p> <p></p>	<p>Majority acquisition of Gesellschaft für analytische Sensorsysteme mbH (G.A.S.)</p> <p>Sole advisor to the buyer Non-Public / 09-2016</p> <p></p>	<p>Squeeze-out by Ehlebracht Holding AG</p> <p>Sole lead manager General Standard 09-2015</p> <p></p>
<p>Rights issue and admission of new shares</p> <p>Settlement agent General Standard 08-2015</p> <p></p>	<p>Settlement stock option plan</p> <p>Sole lead manager Prime Standard 05-2015</p> <p></p>	<p>Capital increase</p> <p>Lead manager Entry Standard 02-2015</p> <p></p>	<p>Capital decrease</p> <p>Sole lead manager General Standard 11-2014</p> <p></p>	<p>Rights issue</p> <p>Selling agent Vienna Stock Exchange 10-2013</p> <p></p>	<p>Designated sponsoring</p> <p>Basic Board since 05-2013</p> <p></p>
<p>Placement of Treasury Stock</p> <p>General Standard 04-2013</p> <p></p>	<p>Corporate bond</p> <p>Selling agent General Standard 09-2012</p> <p></p>	<p>Rights issue</p> <p>Lead manager Entry Standard 07-2011</p> <p></p>	<p>Placement of existing shares</p> <p>Sole lead manager Prime Standard 06-2011</p> <p></p>	<p>Rights issue</p> <p>Sole lead manager Entry Standard 10-2010</p> <p></p>	<p>Designated sponsoring</p> <p>Research Prime Standard since 12-2008 and 09-2010</p> <p></p>
<p>Rights issue</p> <p>Sole lead manager Entry Standard 08-2010</p> <p></p>	<p>Designated Sponsoring Research General Standard since 02-2008 and 05-2010</p> <p></p>	<p>IPO</p> <p>Sole lead manager Entry Standard 02-2010</p> <p></p>	<p>Share buyback</p> <p>Sole lead manager Prime Standard 11-2009 until 01-2010</p> <p></p>	<p>Rights issue and admission of new shares with prospectus</p> <p>Sole lead manager Sole bookrunner Prime Standard / 12-2009</p> <p></p>	<p>Admission of new shares with prospectus</p> <p>Sole lead manager General Standard 05-2008</p> <p></p>


Corporate Strategy & Communication / M&A   
**Thomas Stewens**




Corporate Project Management   
**Axel Rose**  
**Ralf Hellfritsch**  
**Dirk Blumhoff**

Corporate Markets  
**Joachim Schweinfurth**  
**Dominik Glier**  
**Frank Leyers**  





 Corporate Trading / Corporate Markets  
**Harald Rudolph**

 Corporate Trading  
**Peter Sang**


Corporate Services   
**Claudia Preß**  
**Dewi Schöffner**  
**Birgitta Jung**







 Corporate Research  
**Dr. Roger Becker**  
**Daniel Großjohann**

Corporate Actions & Documentation / M&A  
**Lucie Sauerbrei**  
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Perspektiven für den Mittelstand.  
**mi:access**

**Management board:** Ralf Hellfritsch, Peter Sang, Thomas Stewens

**Chairman of the supervisory board:** Dr. Gerhard Grebe

**Regulator:** Bundesanstalt für Finanzdienstleistungsaufsicht, Internet: [www.bafin.de](http://www.bafin.de)

Banking Supervision & Insurance Supervision, Graurheindorfer Str. 108, 53117 Bonn, Postfach 1308, 53003 Bonn  
Phone: +49 (0)228 - 41 08-0, Fax: +49 (0)228 - 41 08-1550, email: [poststelle@bafin.de](mailto:poststelle@bafin.de)

Securities/Asset Management Supervision, Lurgiallee 12, 60439 Frankfurt, P.O. Box 50 01 54, 60391 Frankfurt  
Phone: +49 (0)228 - 41 08-0, Fax: +49 (0)228 - 41 08-123, email: [poststelle-ffm@bafin.de](mailto:poststelle-ffm@bafin.de)

#### Commercial register entry

Frankfurt District Court Commercial Register, HRB 79542, Heiligkreuzgasse 34, 60313 Frankfurt  
email: [registergericht@ag-frankfurt.justiz.hessen.de](mailto:registergericht@ag-frankfurt.justiz.hessen.de)

Tax number: 045 233 18157, VAT-ID No.: DE254290210, LEI: 5299001H21LR9DLCC127

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