

MBA and VBA Board Meeting Presentation

April 9, 2026

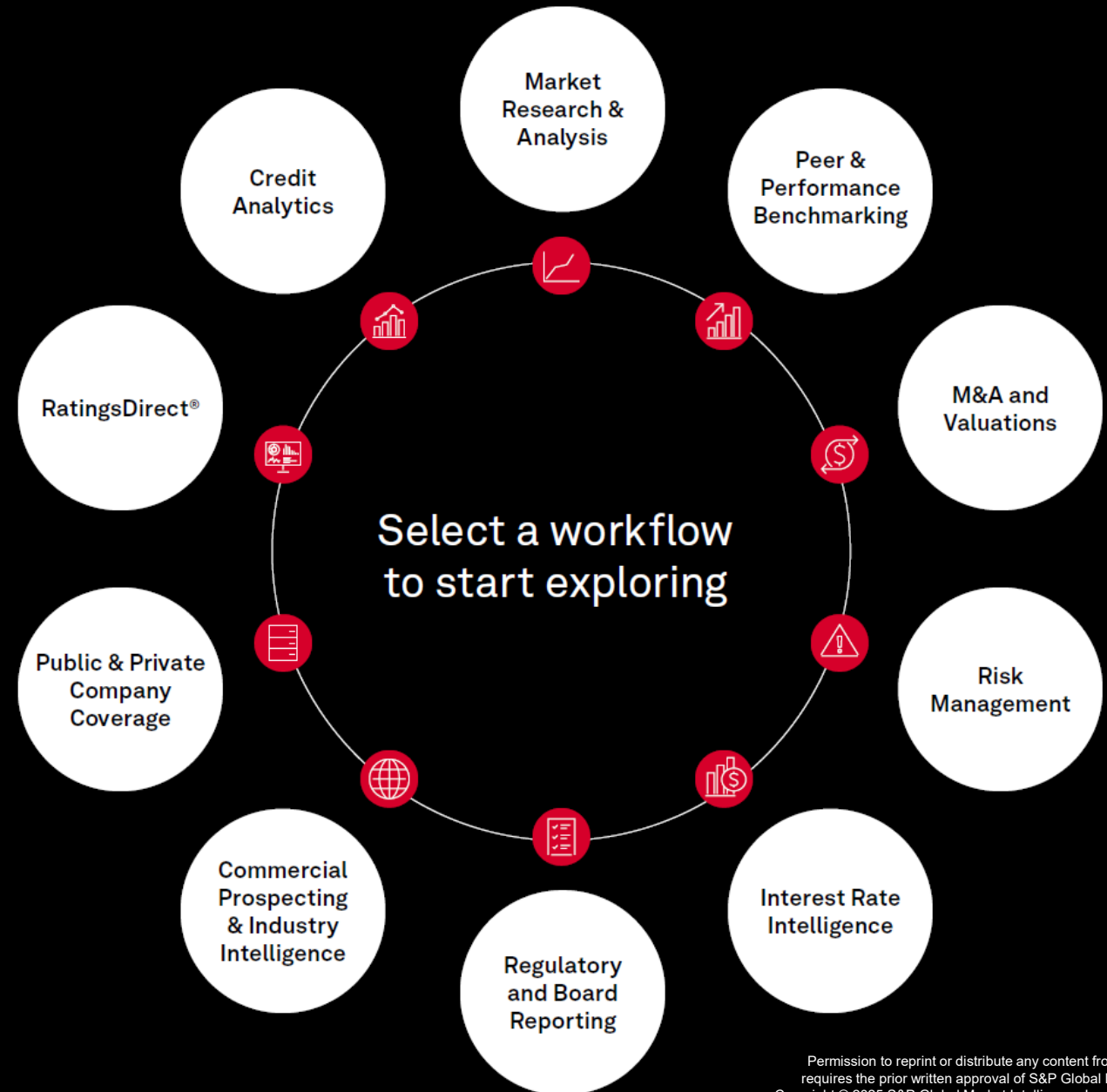
Dhruv Patel
Director Data and Research (CB and IB)
Dhruv.patel@spglobal.com
732.207.8854

S&P Global
Market Intelligence

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Bank Toolkit

Evaluate opportunity, risk & performance



S&P Capital IQ Pro

Deep & Comprehensive Data: Get access to the following industry leading datasets all in one easy-to-use platform:

- The SNL Financial Institutions Regulatory dataset will give you access to bank financial statement filings allowing you to comprehensively assess your financial standing relative to your peers at the most granular level.
- The SNL U.S. Branch dataset gives you access to all US branch information for banks, thrifts and credit unions captured daily from company websites, filings, merger news and government sources.
- SNL Depository Rates dataset provides a comprehensive look at the standard product offerings for all banks and credit unions with more than \$1B in total assets, and 75% of all banks, thrifts and credit unions regardless of asset size.
- U.S. Demographic Data from Claritas provides Financial Product Demand data and Household Segmentation to effectively analyze current and prospective markets.
- Business Listing data from Equifax: Provides details on 40M+ businesses across the U.S. and 5M+ for Canada, detailing firmographics and geographic attributes, along with the Probability of Default for the respective NAICS industries on a state and county level.

Leading Bank Specific News and Research:

S&P Global Market Intelligence provides news for banks that goes beyond the typical articles with data-driven stories you can't find elsewhere. Bank data sets and templates are integrated into our news stories to help you dig deeper, further your research, and better understand the numbers behind the narratives.

The screenshot displays the S&P Capital IQ Pro interface. At the top, there's a navigation bar with 'S&P Capital IQ Pro', a search bar, and various menu items like 'Shortcuts', 'Dashboard', 'News', 'Research', 'Banks & Credit Unions', 'Screener', 'RatingsDirect', and 'More'. Below the navigation, the main content area is titled 'Banking News & Analysis' and includes filters for 'United States and Canada' and 'Market Intelligence'. The primary article is 'First Busey to acquire CrossFirst Bankshares in \$916.8M all-stock deal', featuring a yellow and blue rope knot image. To the right, a 'Recommended for You' section lists several other articles. A left sidebar contains a 'Top Articles' menu with categories like 'Editors' Picks', 'Capital Markets', 'Operations & Strategy', 'Mergers & Acquisitions', 'Regulation, Policy & Law', 'Earnings & Guidance', 'Product Lines', 'Private Equity', 'Personnel', 'Ratings & Research', and 'Industry News'. A 'See More Topics' link is also present.

We serve over 3,000 banking clients nationwide

Commercial Prospecting: Market Insight & Lead Generation

Pipeline building & research tools to grow loan volume

- **25M+ Commercial Real Estate Properties**
- **80M+ C&I Liens and UCC Filings**
- **45M+ Business Listings**

***Now available in FTP, Marketplace Workbench, Snowflake, Xpressfeed™**

For illustrative purposes only.

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Look up businesses or properties for prospect due diligence and pipeline building

Property Information

Owner 1 (i) ORLANDO-UNION RESCUE MISSION INC
 Land Use Category (i) Multifamily
 Property Land Use (i) Multi Family 10 Units Plus
 Property Street Address (i) 3300 W COLONIAL DR
 ORLANDO, FL 32808
 Property County (i) Orange
 Mailing Street Address (i) 1521 W WASHINGTON ST
 ORLANDO, FL 32805
 Building Size (sq. ft.) (i) 12,308
 Property Acreage (acres) (i) 3.65
 Year Built (i) 1968
 Parcel Number (i) 29-22-28-0000-00-163
 Property Key (i) 60460486

Property & Related Properties Map

Related Business (Best Match to Property Owner)

Company Name (i) ORLANDO UNION RESCUE MISSION INC ADMINISTRATION OFFICE
 NAICS Description (i) Social Advocacy Organizations
 Business Address (i) 1521 W WASHINGTON ST ORLANDO FL 32805
 Full Name of Contact (i) FRED B CLAYTON
 Phone (i) (407) 422-4865
 URL (i) <http://www.ourm.org>
 Note: Multiple businesses matched to this property owner - see more details.

Property Value and Recent Sales

Assessed Value (\$)	2,958,470
Assessed Land Value (\$)	1,242,660
Assessed Improvement Property Value (\$)	1,715,810
All Properties: Last Sale (actual)	NA
All Properties: Total Value (\$)	NA
Sale Price (\$)	800,000
Sale Date	1/3/2017
Prior Sale Price (\$)	2,800,000
Prior Sale Date	6/22/2016
County Property Sales Coverage Begin Date	3/1/1986

Create quick lead lists such maturing loans, high value properties, or active UCC liens issued by specific creditors

MORTGAGE 1 LENDER	BUSINESS NAME	MORTGAGE 1 MATURITY DATE (MM/DD/YYYY)	MORTGAGE 1 INTEREST RATE (%)
SEACOAST NAT'L BK	SUAREZ REALTY INC	04/30/2038	4.3775
SEACOAST NAT'L BK	SUAREZ REALTY INC	04/30/2038	4.3775
BANCO DO BRASIL AMERICAS	SONDER USA INC	03/01/2028	4.0990
BANCO DO BRASIL AMERICAS	SONDER USA INC	03/01/2028	4.0990
BANCO DO BRASIL AMERICAS	SONDER USA INC	03/01/2028	4.0990
FLORIDA CMNTY BK NA	REGAL SENIOR CARE MANAGEMENT, LLI		4.3775
CHRISTIAN FIN'L RESOURCES INC	REAL LIFE CHRISTIAN CHURCH OF CLER	01/01/2023	3.7350
SEACOAST NAT'L BK	RAMESCHANDRA B SHAH M.D.		4.3775
TIAA FSB	QUALITY INN-EASTGATE	05/01/2048	4.3775

Dive deeper with trusted industry intelligence married with CRE and C&I Leads

S&P Global Market Intelligence + Vertical IQ Integration

- The integration of Vertical IQ allows lenders to:
 - Engage in more knowledgeable conversations with clients or prospects to gain credibility using deep industry profiles
 - Improve sales efforts by targeting industries for specific products and services
 - Streamline your preparation productive sales calls using Call-prep sheets with relevant industry highlights, including questions to drive conversations
 - Educate business owners about their local market's economic conditions related to real estate, job growth, employment and more
- VIQ covers 100% of the U.S. Economy**

This integrated workflow will allow bankers to seamlessly link to the industry in focus on the Vertical IQ platform, directly from the Market Intelligence Commercial Prospecting and Business Listings tools for more efficient prospecting and loan analysis

For illustrative purposes only.

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Market Intelligence

Safety Clamps Inc | BUSINESS PROFILE
(BUSINESS LISTING ID: 11132554934508)

[ADD TO](#) [PRINT](#) [EXPORT](#) [DEFINITIONS](#) [VERTICAL IQ INDUSTRY PROFILE](#)

Business Detail

Business Street Address ① 233 Santa Barbara Ave
Jacksonville, FL, 32254

Phone ① (904) 781-2809

URL ① <http://www.safetyclamps.com>

Company Data

NAICS Description ① Industrial Machinery and Equipment Merchant Wholesalers

Hardware Manufacturing

Year Established ① 1992

Estimated Employees ① 10 to 19

Estimated Sales Range ① \$5 Million to \$10 Million

Franchise ① No

Area (sq. ft.) ① 5,200

All Liens Related to Business

Total Active C&I Liens (UCC Filings)	7
Total Inactive C&I Liens (UCC Filings)	11
Total Terminated C&I Liens (UCC Filings)	15

[View More >>](#)

Business Listing Map

Bing, © 2021 Microsoft Corporation, © 2021 TomTom

Business Contacts

Primary Contact

Full Name of Contact ① Scott Griffin

Title ① Owner

Email ① sgriffin@safetyclamps.com

[View more business contact details >>](#)

CALL PREP SHEET
Industrial Machinery Distributors

Three Call Prep Questions

What percentage of your products do your suppliers also sell directly?
Manufacturers are growing as competitors facilitated by the internet.

What are your plans for improving your internet sales presence?
Competition is increasing through internet sales from companies that may have a limited physical presence in the local area.

What trend are you seeing in customers choosing to lease or rent equipment rather than buying?
During difficult economic conditions, rental of industrial machinery and equipment may increase.

Working Capital Management

Sell and Invoice: Sell through dedicated sales teams, catalogs, and internet. **Collect:** Collection period averages about 43 to 46 days.

Manage Cash: May use futures contracts to minimize foreign currency exchange risk for imported machinery. **Pay:** Payroll averages 11-12% of sales.

Credit Underwriting And Risks

Industry Risk Rating: 5.3

Business Exit Rates: 4.5 Comparable to US average for all businesses

Cyclical Sensitivity: 6.2 High Sensitivity

Barriers to Entry: 4.6 Moderate initial capital; high regulatory/technical barriers; moderate concentration

External Risk: 5.0 Moderate external risk

Industry Outlook: 5.9 Lower than GDP; high cyclical risk

Financial Summary: 5.0 Low margins; high liquidity; low leverage

Industry Structure

The average industrial machinery distributor generates \$8-9 million in revenue and has about 14 employees.

About 22,500 firms in the industry operate 28,900 establishments, employ 31,000 workers and generate \$192 billion in annual revenue.

83% of firms have less than 20 employees.

They must invest heavily in real estate to house inventory and may have facilities from 1,000 square feet to over one million square feet for the largest distributors.

The largest firms in the industry include Grainger, Vertiv, MSC Industrial Supply Company, Pentair, and Sumitomo Corporation.

Quarterly Insight: 3rd Quarter 2021

Interest In Reshoring Increasing

About 83% of manufacturers surveyed by Thomasnet for its annual State of North American Manufacturing report said that they are "likely" or "extremely likely" to re-shore in 2021, up from 54% in 2020. Top factors that companies consider when they weigh reshoring include total-cost-of-ownership (ranked first), proximity to market, and reduced exposure to shipping costs and disruptions. Some 40% of respondents reported price as the most significant barrier to reshoring.

Industry Forecast

Sales for the US industrial machinery distributors industry are forecast to grow at a 2.51% compounded annual rate from 2019 to 2025, slower than the growth of the overall economy.

Visible Alpha

- Visible Alpha captures forecasts, assumptions, and logic from full working sell-side models to create consensus data with full granularity and transparency.
- Visible Alpha integrates forecast data into comparable views across analysts, companies, and peer groups.
- Investor Relations professionals have embraced Visible Alpha to help them offer a detailed view of the market's sentiment towards their company. Now integrated into Capital IQ Pro!
- Quantify the market view, understand analyst dispersion, and track consensus changes over time.

Period: All | '17 '18 '19 '20 '21 '22 '23 '24 '25 '26 | Mean Median | Statistics Analytics | Restore Defaults | Currency: Reported

All numbers in \$M unless otherwise indicated	STATISTICS	FY2024A	FY2025E	FQ1 2026E	FQ2 2026E	FQ3 2026E	FQ4 2026E
Number of Contributors Available		7	7 of 7	7 of 7	7 of 7	7 of 7	7 of 7
Total securities ⓘ	+	3,246.02	5,089.60	5,121.92	5,159.25	5,201.01	5,215.40
Total Loans, gross ⓘ	+	18,470.62	27,997.27	28,285.29	28,648.41	29,028.18	29,448.27
Allowance for loan losses ⓘ	+	178.64	323.82	326.97	330.98	335.12	339.59
Net loans held for investment ⓘ	+	18,291.98	27,673.45	27,958.32	28,317.44	28,693.06	29,108.69
Tangible assets excl. loans ⓘ	+	4,994.73	7,982.12	8,019.14	8,042.20	8,092.49	8,129.92
Tangible assets ⓘ	+	23,286.71	35,655.57	35,977.46	36,359.64	36,785.56	37,238.61
Goodwill & other intangibles ⓘ	+	1,298.62	2,044.30	2,035.50	2,026.79	2,018.19	2,009.67
Total other assets ⓘ	+	1,739.29	2,770.68	2,744.10	2,724.93	2,719.68	2,702.79
Total assets ⓘ	+	24,585.32	37,699.87	38,012.96	38,386.44	38,803.74	39,248.28
Total interest bearing deposits ⓘ	+	16,120.57	24,001.20	24,287.55	24,540.80	24,835.95	25,076.10
Demand deposits ⓘ	+	4,277.05	7,130.98	7,151.77	7,202.64	7,255.78	7,317.93
Total deposits ⓘ	+	20,397.62	31,124.84	31,444.70	31,767.59	32,138.08	32,478.55
Liabilities excl. deposits ⓘ	+	1,044.83	1,502.56	1,496.57	1,466.36	1,430.91	1,451.96
Other short term borrowings ⓘ	+	60.00	-	-	-	-	-
Long term borrowings ⓘ	+	418.30	826.26	798.37	794.81	822.01	823.22
Other liabilities ⓘ	+	566.52	678.86	695.44	694.39	684.38	733.23
Total other liabilities ⓘ	+	1,044.83	1,502.56	1,496.57	1,466.36	1,430.91	1,451.96
Total liabilities ⓘ	+	21,442.44	32,712.79	32,941.28	33,233.95	33,568.99	33,930.50
Preferred stock ⓘ	+	166.36	166.36	166.36	166.36	166.36	166.36
Common shareholders equity ⓘ	+	2,976.52	4,834.93	4,919.36	5,004.70	5,093.89	5,183.74
Total stockholders equity ⓘ	+	3,142.88	4,987.09	5,071.69	5,152.50	5,234.76	5,317.79
Total liabilities and stockholders equity ⓘ	+	24,585.32	37,699.87	38,012.96	38,386.44	38,803.74	39,248.28

Data Feeds

Unlock the full potential of your business with data feeds from S&P Global Market Intelligence. Our advanced APIs are designed to deliver real-time, actionable insights that can be easily integrated into your existing workflows. Whether you're leveraging large language models (LLMs) for enhanced analytics or streamlining operations through CRM systems, our data solutions provide the agility and depth needed to stay ahead in a competitive landscape.

Datasets

- [Business Listings](#)
- [Market Demographics](#)
- [Commercial Prospecting](#)
- [SNL RateWatch Depository Rates](#)
- [SNL U.S. Bank Branch Data](#)
- [SNL Financial Institutions Regulatory Data](#)

Solutions

- [Snowflake](#)
- [Xpressfeed™](#)
- [Salesforce App](#)
- [Kensho LLM-ready API*](#)
- [S&P Global Reverse ETL](#)
- [S&P Capital IQ Workbench](#)

*Not all datasets are available in the Kensho LLM-ready API, but should be by Q1'26

Final Output **Salesforce**

Account

S&P Capital IQ Revenue (USD) S&P Capital IQ Company ID

Details Contacts **CPL**

Business Listings

MI Business Listings ID		MI BL Estimated Sales Level	\$10 Million to \$20 Million
MI BL Doing Business Name		MI BL Marketability Score	Fully Marketable
MI Business Listing Type	Firm	MI BL Marketability Category	Marketable: Indicates there's recent positive information indicating this business is still operating and can be marketed to, typically the phone number connectivity and/or address has been recently validated.
MI Is Franchise?	<input type="checkbox"/>		
MI BL Estimated Employees	10,000 or more		

Property Profiles (1) [New](#)

Property Profile Name	Land Use Category	Assessed Land Value
268 HILLSIDE AVE GLEN RIDGE, NJ	Commercial	USD 63,000.00

[View All](#)

Lien Profiles (1) [New](#)

Lien Profile Name	Filing Date	Filing Type	Collateral
525 WEST 20TH ST, NEW...	4/16/2020	Original Filing	Machinery and Equipment

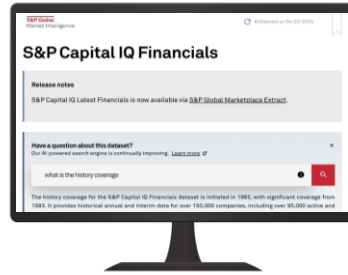
[View All](#)

Powering Your Workflows with **Generative AI**

We partner with Kensho, S&P Global's AI innovation arm, as well as our own data scientists, to provide AI-powered integrated research and analysis workflow solutions via web, Microsoft Office, and modern technological solutions to drive efficiency. We are leveraging Generative AI to enable:

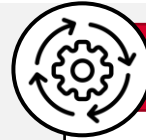


Discovery & Exploration

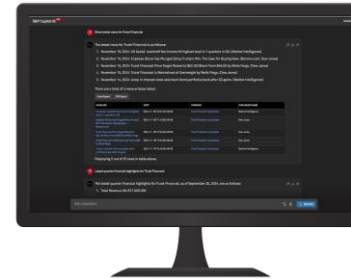


Helps you find what is most relevant to your workflows and business needs

- **Marketplace GenAI Search** allows you to quickly ask questions and surface answers in seconds on our datasets metadata
- **Capital IQ Pro AI Search** allows you to seamlessly navigate the robust Capital IQ Pro platform and quickly find what you need for research and analysis
- **Ask AI Help in Capital IQ Pro** allows you to learn how to get the most out of our offerings

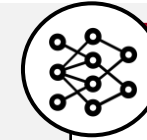


Workflow Simplification

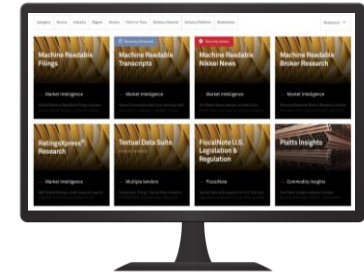


Allows you to be more efficient in your day-to-day tasks

- **ChatIQ** answers natural language questions for companies, financials, transactions and textual documentation across Capital IQ Pro
- **Morning, Midday and Evening IQ** pushes daily market summaries and insights straight to your inbox
- **Document Intelligence & Transcript Summarization** provides an enhanced document analysis experience
- **Natural Language Screener** to find companies based on criteria written in plain language (*in development*)



AI-Ready Data



Preparing for direct input into your own internal generative AI models

- We provide data that is **linked** and **structured** with metadata and cleansed textual documents to remove erroneous items **ready for machine readable analysis**
- For non-textual data that is challenging to utilize in LLM, we **offer data and business and finance-specific prompts** to feed straight into client-side models that can be used with client prop data

Kensho LLM-ready API

Access key S&P Global data via any GenAI application with the Kensho LLM-ready API

The API enables you to seamlessly integrate key S&P Global datasets into any generative AI application, like ChatGPT, Gemini, or Claude through our partnership with Anthropic. Designed with investment bankers, equity analysts, consultants, and similar roles in mind, the Kensho LLM-ready API supports efficient retrieval trusted S&P Global data for workflows such as creating pitch books, research reports, and market positioning presentations.

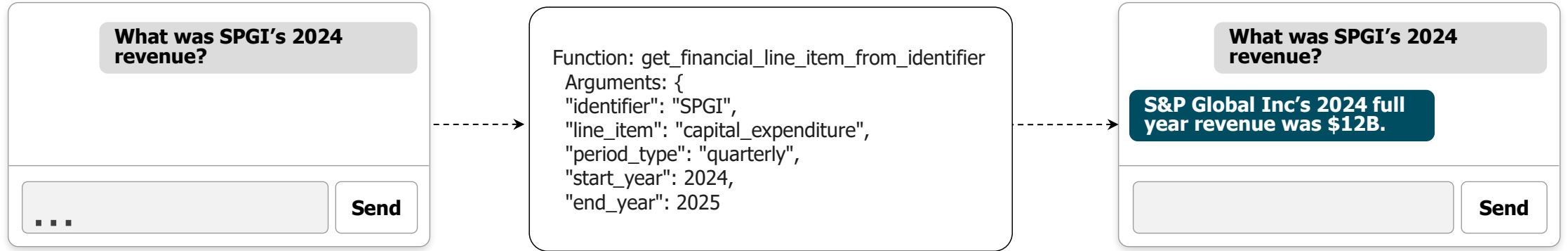
How it works:

- Python client that enables LLMs to interact with the API
- API endpoints map directly to SQL queries on the backend server that call on S&P's Xpressfeed database
- These endpoints form the "tools" LLMs can call to retrieve answers or generate analytics
- Every LLM query is translated into function calls or code, providing traceability and reproducibility

Supported S&P Global datasets:

- Capital IQ Financials
- Market Data
- ISCRS
- GICRS
- Business Relationships
- Earnings Call Transcripts
- Company Intelligence
- Competitors
- M&A Transactions

Integrating the Kensho LLM-ready API into a client-side application or workflow



User asks a natural language question.

The user will ask the LLM a question, such as "What was SPGI's 2024 revenue?"

S&P Global receives an API function call.

The LLM generates the correct API call that gets sent to the Kensho LLM-ready API to retrieve the data from S&P Global's Xpressfeed database.

The LLM returns the correct answer.

The API returns the data to the LLM. The LLM takes the data and formats a natural language response.

S&P Capital IQ Pro AI Enhancements

S&P Global

Market Intelligence

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S&P Capital IQ Pro: AI Support

Banking News & Analysis

United States and Canada All

Share buybacks slow worldwide as US tariffs take root

Monthly aggregate transaction values averaged \$43.27 billion through first seven months of 2025 before falling to

Recommended for You

Heritage Financial to acquire Olympic Bancorp in all-stock deal

strategy shift emphasizes org

based QNB to acquire in-sta 1M deal

shares, HarborOne Bancorp deal

d Century Bancorp to acquire anceshares

Need Help?

How can I find which Indiana banks that are classified as an S-Corp?

Generate

Answer

To find Indiana banks classified as S-Corp on the S&P Capital IQ Pro platform, follow these steps:

1. Select Screener from the top navigation bar and then choose Screener Home.
2. From Screener Home, select the Regulated Depositories (U.S.) data set and click Add Search Criteria.
3. In Field Search, type "Memo: Subchapter S Election" or use key field "215441".
4. Click Memo: Subchapter S Election, then click Apply.
5. Set the criteria to Equal > Yes, add it, and click Run Screen.
6. Filter the results by geography to Indiana to view only Indiana banks classified as S-Corp.

Please refer to the links below for sources used for this answer and more information.

Didn't get the answer? Choose an option below for help.

[Request a call](#) [Online Chat](#) support.capiqpro@spglobal.com

23 minutes ago • Extra

Editors' Picks

Daily

WALL

Regulated Depositories (U.S.) ☆ | NEW SCREEN

Currency Reported currency

CRITERIA

RESULTS (92)

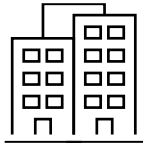
DISPLAY COLUMNS

Custom Screener Report 1

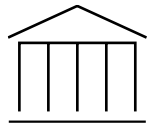
	COMPANY NAME	SNL INSTITUTION KEY	CITY	STATE	REGULATORY ID	PARENT NAME	PARENT REGULATORY ID	CERT NUMBER	TOTAL ASSETS MSTRCTQTR (\$000)	TOTAL DEPOSITS (INCL DOM & FOR) MSTRCTQTR (\$000)	DEPOSIT GROWTH RATE MSTRCTQTR (%)	LOANS/ DEPOSITS MSTRCTQTR (%)	MEMO: SUBCHA... S ELECTION? MSTRCT... (YES/NO)
<input type="checkbox"/>	Wayne Bank and Trust Co.	1009567	Richmond	IN	451246	Waytru Bancorp	1204533	1849	238,518	215,572	9.44	87.59	Yes
<input type="checkbox"/>	The Peoples State Bank	1009594	Ellettsville	IN	454546	Ellettsville Bancshares, Inc.	1206676	14113	464,993	406,320	8.76	63.69	Yes
<input type="checkbox"/>	The Garrett State Bank	1008715	Garrett	IN	465243	G.S.B. Financial Corporation	1210011	8074	384,390	322,357	31.14	87.16	Yes
<input type="checkbox"/>	The Bippus State Bank	1009471	Huntington	IN	443148	Bippus State Corporation	1210217	1847	406,267	333,138	7.96	98.10	Yes
<input type="checkbox"/>	Peoples Trust and Savings Bank	1004996	Boonville	IN	67142	Peoples Bancshares Corp	3199790	13113	243,964	196,245	-2.50	91.53	Yes
<input type="checkbox"/>	LNB Community Bank	1006253	Lynnville	IN	176642	LNB Community Bancorp	2807007	4398	179,758	160,449	60.13	82.06	Yes
<input type="checkbox"/>	Hoosier Heartland State Bank	1006025	Crawfordsville	IN	157744	Hoosier Heartland State Bancorp	3823657	15566	330,623	305,984	1.27	77.94	Yes
<input type="checkbox"/>	Grant County State Bank	1015467	Swayzee	IN	933340	Grant County State Bancshares, Inc.	1205370	15687	375,233	292,443	10.49	107.44	Yes
<input type="checkbox"/>	Freedom Bank	4053291	Huntingburg	IN	2858492	Freedom Bancorp	3575787	35221	563,665	486,362	-5.55	100.95	Yes
<input type="checkbox"/>	First Bank of Berne	1007946	Berne	IN	312244	First Berne Financial Corporation	1133008	9288	1,122,586	1,008,625	23.06	77.12	Yes
<input type="checkbox"/>	Farmers and Merchants Bank	1008662	Laotto	IN	372640	FM Fincorp	1135196	13801	295,939	273,569	24.62	63.80	Yes
<input type="checkbox"/>	Bath State Bank	1007893	Bath	IN	308340	Bath State Bancorp	1249329	8035	324,042	274,534	-3.42	89.04	Yes
<input type="checkbox"/>	Bank of Wolcott	1012983	Wolcott	IN	729842	Wolcott Bancorp	1210208	16201	264,324	225,364	19.07	61.44	Yes
<input type="checkbox"/>	Alliance Bank	1010086	Francesville	IN	493741	Alliance Bancorp	1138405	197	458,995	404,184	17.06	78.21	Yes
<input type="checkbox"/>	Union Savings and Loan Association	1001587	Connersville	IN	677870		NA	29933	248,871	223,654	-12.86	93.12	No
<input type="checkbox"/>	Tri-County Bank & Trust Company	1015241	Roachdale	IN	914545	Tri-County Bancorp.	1205286	210	299,524	246,597	14.25	84.30	No

Thought Leaders

US FIG Thought Leadership & Research



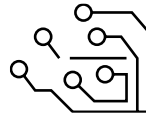
Banking Performance
Outlook



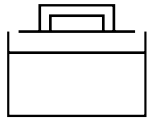
Community Bank
Outlook



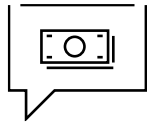
Digital Banking



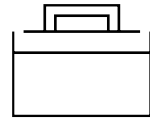
Financial Sector
M&A



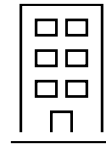
Performance
Rankings



Deposit Market Share
& Branches



Loan and Deposit
Trends



Bank Consumer
Rates & Pricing
Betas

2025/2026 Hot Topics

Deposits

Interest Rate
Environment

Credit Risk

Regulation

Bank M&A

FinTech



Nathan Stovall
FIG Research
Director



Zain Tariq
Senior Analyst
Bank Performance



Jordan McKee
Research Director,
Fintech



Joe Mantone
M&A



Tom Mason
Data Science



McKayla Wooldridge
Fintech



Chris Hudgins
Commercial Real
Estate