MERGERS & ACQUISITIONS · Equity Investments · Alliances · Restructurings · Divestments · Private Equity

M&A REVIEW

Special
Edition 2026

Published by
mandaco · fintalent.com

200+
tools mapped across the deal lifecycle

HANDBOOK

M&A TOOLS & SOLUTIONS

60% AI-enabled · >50 vendor-verified · 8 chapters · fully linked ePDF

where

M&A and Transformation

leaders connect.

mandaco

fintalent.com

Community · Expertise · Growth

M&A Tools & Solutions Handbook 2026

From the community, for the community

Every deal team has one. The private list of tools that actually work - the data room a partner swears by, the sourcing engine that found the target that nobody has seen before, the CRM that finally mirrors how deals really move. These lists live in notebooks, onboarding decks and late-night Slack messages. They are traded like favours. Nobody had ever put them together.

This is that list, compiled in the open: >200 tools and solutions along the entire deal lifecycle, from the first market map to the hundredth day of integration - researched, categorised and described in a single, consistent format.



Ömer F. Güven
Founder & Managing Director,
fintalent.com



Stefan Schneider
Publisher, M&A REVIEW
Managing Director, mandaco

M&A has been more conservative than most functions about modernising. A lot of the work still runs on spreadsheets and habit, even as the tools around it have caught up fast. The market is crowded and moving quickly, which makes it hard for any one team to know what is out there, what is mature, and what is worth adopting. That is the picture this report is meant to clear up: a practical map of the tools M&A teams are actually using, so the people running deals can spend less time finding the technology and more time putting it to work.

It exists because two communities decided to stop keeping their notes to themselves. Fintalent.com opened the collection of its global network of independent M&A professionals, together with M&A Science; mandaco and the M&A REVIEW added the DACH perspective and the market screening of the Bundesverband M&A's digitalisation working group. Neither of us could have built this alone - and that is precisely the point. The tools a team picks now decide which companies it ever sees, how quickly diligence closes, and how much of a deal's value survives integration. No single team can keep an overview of a market moving this fast. A community can.

So this is deliberately a reference, not a ranking. Inclusion is editorial and free of charge, no listing can be bought, no tool is scored. Eight chapters follow the deal lifecycle; every entry carries a separate AI block, because "AI-enabled" can mean a search index or an agent that executes a multi-step workflow - and the difference is the second question worth asking any vendor. In the ePaper each entry links through to the provider's partner page, where everything published after print day continues to collect.

Our thanks go to everyone who made this edition possible: the practitioners who shared their stacks, the vendors who reviewed their entries, the BMA working group for opening its research, and the editorial and design team who turned a database into a magazine.

This handbook comes from the community - and it belongs to it. If a tool is missing, tell us. The 2027 edition starts now, and it will be presented where the community meets: at the M&A Excellence Days 2027, 22–24 February 2027 in Bad Vilbel, where half a day is reserved for tools and solutions.

In this handbook

This ePaper is fully linked: every line below, every chapter tab and every tool page is clickable. Tags and landing-page buttons lead into the mandaco environment, where each provider's partner page collects its articles, news and updates beyond print day.

Editorial - From the community, for the community 3

Contents 4

How this handbook was made - and how to read it 5

Who is behind this handbook 6

The 2026 landscape at a glance 8

AI in M&A: the gap between claim and function 10

Chapter 1 · Strategy & Deal Sourcing *26 tools* 12

Chapter 2 · Market Intelligence & Data *28 tools* 40

Chapter 3 · Deal Management, CRM & Pipeline *22 tools* 70

Chapter 4 · Virtual Data Rooms & Transaction Security *39 tools* 94

Chapter 5 · Due Diligence (Financial · Tech/Code · Legal) *37 tools* 134

Chapter 6 · Valuation & Financial Analytics / BI *12 tools* 172

Chapter 7 · Post-Merger Integration *13 tools* 186

Chapter 8 · Cross-cutting Platforms, Talent & Financing *27 tools* 200

Guest view · Prof. Dr. Karl Popp 69

Guest view · Kison Patel 185

Outlook 2027 & Index A–Z 228

Methodology & transparency
How to read this handbook

How this handbook was made - and how to read it

Sources.
Entries were compiled from three research streams that ran in parallel: the tool collection of the Fintalent network together with M&A Science, the market screening of the BMA working group on digitalisation, and mandaco / M&A REVIEW editorial research. Many tools were reached by more than one of them. Every vendor was invited to review its own entry.

Independence.
Inclusion is editorial and free of charge. No listing can be bought, no tool is ranked or scored, and no vendor saw another vendor's page. Descriptions are based on vendor statements and public information; errors and omissions excepted.

A note on placement
No taxonomy survives contact with a real deal. Many tools cover several steps of a transaction, yet each appears only once in this handbook. We placed every entry in the chapter where a buyer is most likely to start looking. Sometimes that reflects how deal teams actually use the tool, sometimes how the vendor positions itself. To show the full scope, each entry carries up to three deal-stage tags: Sourcing, Pipeline Management, Diligence, Valuation, Integration or All. If a placement does not match how your team works, the tags are the better guide.

How to read a tool page.
Every page follows the same anatomy. The key-details bar carries deal-stage tags, headquarters, founding year and vendor. Below it: a one-sentence positioning, a longer profile, key features, what sets it apart, pricing and target users. A separate block reports AI capabilities and integrations. The landing-page buttons leads to the provider's tool-pages in the mandaco and fintalent environment, where its articles, news and updates continue to collect.

Colours & navigation.
Each of the eight chapters has its own colour, carried by the triangles and page tabs. In the ePDF, chapter tabs, deal-stage tags and the table of contents are clickable throughout.

Living document.
The ePaper is updated between editions, and vendors can amend their entries at any time via their tool page. Printed special editions follow the event calendar, starting with the M&A Excellence Days 2027, and are available on demand.

Who this handbook is for
The handbook works as a reference, not as a verdict. Deal teams and corporate development units can compare their current tools with what peers use and spot categories they have not yet explored. Software providers get a view of their own segment within the overall landscape and of the solutions buyers consider neighbouring. Investors can see where competition is already dense, where the market remains scattered and where consolidation may come next. The handbook deliberately contains no ranking, so every reader can draw their own conclusions.

Who is behind this handbook

mandaco

The M&A community's home in German-speaking Europe

mandaco is the umbrella brand of M&A Media Services GmbH - a media house built around one profession. Under it sits the M&A REVIEW, since 1990 the leading German-language journal for M&A practitioners and now in its 37th volume; its English sister title M&A REVIEW UK and LEBENSWERK, the magazine for transformation of and succession in the German Mittelstand.

mandaco also runs the office of the Bundesverband M&A (BMA) – the German M&A Association. That is an unusual arrangement for a publisher, and it is the reason this handbook exists in the form it does: The M&A REVIEW is the official publication of the association for the association and, hence, results of the association's working groups - among them the working group on digitalisation, whose market screening contributed with a significant number of the providers on these pages - are published in the magazine.

What mandaco does

- Publications - M&A REVIEW, M&A REVIEW UK, LEBENSWERK, and the special editions, of which this handbook is one.
- Events - the M&A Excellence Days, the BMA's annual conference, the M&A Award, member meetings of the BMA, and a networking series that runs across European cities, from Frankfurt to London to Madrid.
- Learning & Development - the M&A Curriculum, the M&A Career Week, the workshop series and DealChamp: a route into the profession that starts at university and does not stop at the first job.
- The platform - manda.co, where every provider, author and partner has a page that keeps collecting articles, news and updates long after print day.

What connects them is a conviction that a community structure makes possible and a purely commercial publisher rarely can: that this profession improves fastest when it works in the open. mandaco sees itself as a bridge between academia and practice, and supports M&A research directly - the decision-consistency behind the M&A Award evaluation, and behind DealChamp, came out of exactly that work.

That is also the standard this handbook is held to. No listing in it can be bought, no tool is scored, and the entries for mandaco's own products on the following pages were written to the same template, and reviewed to the same rules, as every other entry in this book.



manda.co
ma-review.de
ma-review.uk

M&A Media
Services GmbH

Habenschadenstraße 16
82049 Pullach
kontakt@ma-review.com

Who is behind this handbook

fintalent.com

The independent network inside live deals.

Fintalent.com is a global platform connecting corporate M&A and finance teams, portfolio companies, and founder-led businesses with 5,000+ vetted, senior independent professionals across 52 countries and 20+ industries.

The platform covers M&A execution, PMI, transformation, restructuring, and strategic finance, from interim CFO mandates to full-scale integration programs. Clients post a project briefing and receive a curated shortlist within 24 hours, powered by data-driven matching and human expertise. Around 5% of applicants pass Fintalent's screening and reference checks. Those who do bring more than 15 years of experience on average.

Placing senior people into live deal teams means paying close attention to how those teams work: how they are built, where they get stretched, what makes them effective under pressure. The people are one half of a team's capability. The systems and tools they work with are the other. You cannot understand how a modern M&A function performs by looking at either one alone.

So mapping the tools became a natural extension of what Fintalent already does. Along the way it meant getting to know many of the vendors in this handbook, and building a picture of a market that has matured a lot in the last few years.

What Fintalent brought to this report:

- Built the core inventory of M&A tools, drawing on the experience and recommendations of its global network across M&A, integration, transformation, and strategic finance.
- Contributed a broad international view of the market, including the United States, the United Kingdom, the Nordics, Benelux, and other major M&A markets, where more than 60% of the vendors in this report are headquartered.
- Incorporated perspectives from the wider M&A practitioner community, including a guest contribution from Kison Patel of M&A Science.
- Helped define the report's structure, editorial direction, and presentation, so the landscape works not only as a directory of vendors but as a practical reference for people doing M&A work.

The professionals on the platform are often the ones choosing and running these tools inside a client's deal team or integration office. The tools speed up a deal, but someone still has to decide how they are used and by whom. On a carve-out or a first integration, that judgement sometimes has to come from outside the core team. Fintalent's role is to find that person: a

senior independent professional who has run the same process before and can join for as long as the mandate requires.

Fintalent will continue to track these patterns through its live mandates and network. The 2027 edition of this handbook is already open for nominations from the community.

fintalent.com

fintalent.com

Fintalent Ltd.

167–169 Great Portland Street,
5th Floor, London, W1W 5PF
United Kingdom

The 2026 landscape at a glance

200+ tools. Eight phases. One map.

Every number on this page comes from the editorial master list behind this handbook. None of it is a market estimate: it is a count of what we were able to research, verify and print. Where the data is thin, the page says so.

204

tools & solutions catalogued



Cross-cutting Platforms, Talent & Financing
27 tools

Strategy & Deal Sourcing
26 tools

Post-Merger Integration
13 tools

Valuation & Financial Analytics / BI
12 tools

Market Intelligence & Data
28 tools

Due Diligence (Financial · Tech/ Code · Legal)
37 tools

Deal Management, CRM & Pipeline
22 tools

Virtual Data Rooms & Transaction Security
39 tools

60%

state AI capabilities in their core product



Where in the deal these tools sit

Data & Intelligence	32
Marketplaces & Networks	20
M&A-native Workflow Platforms	49
Horizontal Software Used in M&A	42
AI Analysis & Agents	47
Services, Talent & Capital	14

Where the vendors sit (HQ)

USA	107 · 53%
DACH	43 · 21%
United Kingdom	20 · 10%
Benelux & Nordics	12 · 6%
Rest of world	22 · 11%

Tools per lifecycle chapter

Chap. 1 · Strategy & Deal Sourcing	26
Chap. 2 · Market Intelligence & Data	28
Chap. 3 · Deal Management, CRM & Pipeline	22
Chap. 4 · Virtual Data Rooms & Transaction Security	39
Chap. 5 · Due Diligence (Financial · Tech/Code · Legal)	37
Chap. 6 · Valuation & Financial Analytics / BI	12
Chap. 7 · Post-Merger Integration	13
Chap. 8 · Cross-cutting Platforms, Talent & Financing	27

Three things stand out. First, the map is lopsided by the shape of the market, not by the shape of this book: sourcing and the data room account for close to half of all deal-stage tags, while integration - the phase where deals are lost - has thirteen entries and fourteen mentions. The first half of a transaction is far better served than the second. Second, half the vendors are American and a fifth sit in the DACH region, a share well above this market's weight in global deal volume and a direct result of the research behind these pages. Third, nearly a third of all vendors decline to name a deal stage at all and claim the full lifecycle instead. Some have earned it. For the rest, "all stages" is a positioning choice, and the most useful question a buyer can ask is which single stage the product was actually built for.

Six observations - deliberately based on our own data, not opinions

AI in M&A: the gap between claim and function

1 **More than every second...** Of the tools in this handbook, just under 60% state AI capabilities in their core product. That is a large number and a smaller one than the market's own noise suggests - and the rest that make no AI claim at all include some of the most widely used software on these pages. The interesting question in 2026 is no longer who has AI. It is who does not, and why they have decided they do not need it.

2 **The claim is a range, not a fact.** "AI-enabled" covers everything from a semantic search index to an agent that executes a multi-step task without being asked twice. Both are truthfully described by the same two words. That is why every entry in this book carries a separate AI block reporting what the vendor says the AI actually does - so a buyer's second question can be specific.

3 **The data room is the centre of gravity.** With 39 entries, virtual data rooms are the single largest category in this handbook - larger than any sourcing category. Storage has been a commodity for a decade; what is being sold now is the assistant on top of it: Q&A over the documents, auto-redaction, findings extracted before a human opens the folder.

4 **Sourcing has become a query.** Strategy & Deal Sourcing is the fastest-moving chapter in this handbook. Engines read millions of private-company signals and return ranked longlists; marketplaces match mandates automatically; several vendors now sell intent-to-sell signals months ahead of a formal process. The funnel no longer starts with a list. It starts with a sentence.

5 **Integration remains the empty quarter.** Thirteen entries. The phase that decides whether a deal was worth doing is the least-tooled in this handbook, and it is where the newest entrants are aiming - synergy tracking, integration governance, and analytics that try to measure the human side. If one chapter grows visibly by 2027, it will be this one.

6 **The bottleneck moved, it did not disappear.** Contract review, code audits and cyber scans that took weeks now return structured findings in hours. What has not compressed is judgement: pricing the risk the machine surfaced, and deciding which of two hundred flagged clauses actually changes the price. M&A has been slower than most functions to modernise, and much of the work still runs on spreadsheets and habit. The tools have caught up faster than the working practices around them.

mandaco

CONTENT. COMMUNITY. LEARNING.

M&A ALL DAY

mandaco is the platform for the M&A community in Germany and Europe – with high-quality content, relevant events, and structured learning formats across the entire M&A lifecycle.

CONTENT

High-quality professional content for M&A practice – well-founded, independent, relevant.

EVENTS & COMMUNITY

Exchange, visibility, and excellence within the M&A community.

LEARNING & DEVELOPMENT

Structured professional development across all career stages in M&A.

An integrated ecosystem for M&A – from knowledge and exchange to personal development.

M&A REVIEW LEBENSWERK CAREER M&A

CHAPTER 1

Strategy & Deal Sourcing

26 tools

Every deal begins as a name on a list. This chapter covers the tools that build and qualify that list: market-mapping and scouting engines, buyer–seller matching, and deal marketplaces that widen the top of the funnel. This chapter with 26 tools is one of the fastest-moving - and one of the most AI-driven, as search shifts from keywords to models that read millions of private-company signals. Representative platforms range from data-rich sourcing engines such as Inven and Sourcescrub to marketplace and matching models like DealCircle and Dealsuite. The practical question for a dealmaker is less "which tool is best" than "which coverage, which geography, and which workflow" - a mid-market European advisor and a global corporate development team will draw very different shortlists from this chapter.

In this chapter: Deal Marketplaces · Deal Sourcing · Deal Sourcing / Matching / Origination & AI · Shortlisting

✓ Verified by vendor

Dealsuite

Dealsuite

dealsuite.com

Sourcing | HQ: Netherlands | Founded: 2017

Dealsuite is a closed market network of vetted advisors, investors and strategic buyers, built around live mid-market mandates and combining algorithmic matching with AI-powered search across a large, active community in 60+ countries, with particularly strong coverage in Europe.

Dealsuite is a private market network and deal sourcing platform for M&A professionals, connecting buy-side and sell-side opportunities in real time across Europe and beyond. Members are vetted and mandates are kept current, with AI-powered search helping members find the right match faster.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Strategic Buyers

Pricing:
Membership-based SaaS, with annual subscription fees varying by firm type, seat count, and geography.

Key features:
- Smart matchmaking – Algorithm-based matching between investment criteria and live mid-market mandates across Europe.
- Daily dealflow – Access to thousands of projects and daily new mid-market deals.
- Closed network – Only validated M&A advisors and investment professionals can join.
- Advanced filters – Detailed filters and saved searches to pinpoint relevant opportunities.
- Trusted adoption – Used by firms such as Deloitte, Grant Thornton, BDO and many others, with especially deep coverage across Europe.

What sets it apart:
- Helps advisors and investors avoid missing relevant deals.
- Reduces manual outreach by surfacing matches automatically.
- Provides market data and insights in one platform.

AI Capabilities:
An AI-powered search feature helps members quickly find relevant buy- and sell-side opportunities based on criteria such as sector, size, geography, and strategy, alongside Dealsuite's core algorithmic matching engine.

Integrations:
Operates as a web-based SaaS platform used alongside CRMs and data rooms.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

inven

Inven

inven.ai

Sourcing | HQ: Finland | Founded: 2022

Inven is an AI-native research and company analysis platform that gives PE, banking and corporate M&A teams faster, more complete visibility into private markets, helping them complete company research and analysis 10x faster.

Inven is an AI-native analyst platform for private markets that helps finance professionals research companies, markets and deals faster than manual workflows allow, using global private company data and advanced AI to replace manual research. It is scanning 28M+ companies across 160+ countries using NLP over 4M+ sources to build private company profiles, market maps, and deal intelligence.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Investment Banking · Business Brokers · Search Funds

Pricing:
Subscription – list price ~USD 10,000/user/year with annual contracts. Aggressively discounted in negotiations (up to 70% reported), making actual pricing highly variable.

Key features:
- AI analyst workflows – Natural-language prompts like „B2B SaaS companies in the UK" combined with filters for revenue, growth and ownership signals, answering research questions in seconds.
- Deep data coverage – 28M+ companies, 3M+ transactions, 430M+ contacts across 160+ countries.
- Multi-source data ingestion – AI and NLP analysing millions of data points from diverse sources into unified company profiles.
- Company, buyer & investor analysis – Tools to profile companies and identify relevant financial and strategic players active in specific niches.
- Chrome extension – Browser extension and exports that let users pull Inven intelligence directly into their workflows.

What sets it apart:
- Transformer-based NLP in 47 languages with unmatched lower-middle-market coverage.
- Proprietary private-company dataset - analysis runs on Inven's own data, not just licensed public-market feeds.
- Natural language and example-based search - describe what you want, get matched companies and analysis.
- Proprietary signals (e.g. intent-to-sell) surface company developments 6–12 months before they become public.

AI Capabilities:
Inven uses AI algorithms and NLP to analyse millions of global data points, build company and transaction data, and answer finance teams' research and analysis questions through natural-language interaction.

Integrations:
Chrome browser extension and CSV exports into CRM/analytics tools; Salesforce, HubSpot, DealCloud, Chrome Extension, API; Integrates via exports and potential APIs into clients' deal stacks.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Venture IQ

VentureIQ

ventureiq.nl

Sourcing | HQ: Netherlands | Founded: 2015

Venture IQ offers AI-powered software and research services that help corporate and financial investors discover, evaluate and collaborate on more relevant targets across innovation and M&A themes, faster.

Founded in Amsterdam in 2015, Venture IQ works with leading corporates and investors such as Eneco and Vortex Capital Partners offering both tooling and analyst support to deliver proprietary insights and target lists aligned with clients' strategic criteria.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Corporate Venture · R&D & Innovation · Corporate Development

Pricing:
Software pricing is publicly listed on the Venture IQ website. Services/project-based scouting are not publicly priced.

Key features:
- Catalist software: One platform to find, analyse, collaborate on and track companies, supporting lead generation and screening.
- AI & automation: Uses AI, smart automation and data analysis to process more companies and surface relevant targets.
- Monitoring: Catalist can help you monitor thousands of companies on potential deal signals.
- Collaboration features: Commenting and dealflow tracking so teams can work together on opportunities.
- Multi-market coverage: Works across industries and geographies, including startups, SMEs and established players.

What sets it apart:
- Highly configurable platform combined with AI-enhanced data gathering and analysis.
- AI-enhanced market mapping tailored to client criteria.
- Collaboration-centric dealflow tracking in Catalist.

AI Capabilities:
A standard AI platform can process thousands of companies, but it won't let you collaborate with colleagues, monitor changes, or scale as you grow. Catalist does all three.

Integrations:
Catalist connects to web data and can export to client systems like Affinity, Hubspot, Pipedrive and Claude

More information on **manda.co**

More information on **fintalent.com**

Acquire.com

acquire.com

Sourcing | HQ: USA | Founded: 2020

Acquire.com is a founder-friendly startup acquisition marketplace that lets entrepreneurs buy and sell profitable online businesses with vetted listings, integrated deal tools, and expert support.

Originally launched as MicroAcquire in 2020, Acquire.com has become one of the largest founder-friendly startup acquisition marketplaces, helping founders of profitable SaaS, e-commerce, and other online businesses connect with a global network of buyers. The platform streamlines the full transaction lifecycle with curated deal flow, integrated legal documents, escrow, diligence workflows, and education via Acquire Academy, and has facilitated thousands of acquisitions representing hundreds of millions of dollars in closed deal volume.

Target users:
End client (sell side) · M&A Advisory · Private Equity

Pricing:
Mixed model: it is free to browse public listings; buyers can upgrade to annual Premium (around USD 390/year) or Platinum (around USD 780/year) memberships to contact founders and access full deal tools, while sellers pay success-based closing fees and, for larger deals, listing fees rather than traditional broker commissions.

Key features:
- Curated marketplace of vetted startups and online businesses across SaaS, e-commerce, agencies, content, and more.
- Large buyer network (500k+ registered entrepreneurs and investors) with powerful filters and matching tools.
- Guided acquisition workflow with integrated legal document builders, due diligence and closing tools, and Escrow.com support.
- Buyer membership tiers (Basic, Premium, Platinum) that unlock private listings, detailed metrics, and expert matchmaking.
- Education and community via Acquire Academy, content, and events to help founders and buyers navigate M&A.
- Integrated financing and partner ecosystem, including Boopos acquisition loans and third-party advisors.

What sets it apart:
- Specialized in profitable SaaS and online businesses, with deep expertise and curated deal flow.
- Transparent, subscription-based buyer model and success-based seller fees instead of opaque broker commissions.
- Embedded education and expert support through Acquire Academy, content, and advisory partners.

AI Capabilities:
Uses AI-powered tools in its buyer membership experience to assist with legal documents, diligence workflows, and closing, surfacing key metrics and streamlining evaluation; leverages internal algorithms for matching buyers and sellers, deal curation, and risk checks across the marketplace.

Integrations:
Escrow.com for payments and closing, Boopos for acquisition financing, SRS Acquiom and other partners for closing support; integrates its workflows with standard legal and financial tools via document builders and export.

More information on **manda.co**

More information on **fintalent.com**

Axial

axial.net

Origination | HQ: USA | Founded: 2010

Axial is the largest online marketplace for buying, selling, and financing private companies in the lower middle market, connecting 4,500+ buyers and investors with 10,000+ deals every year.

Largest online marketplace for buying, selling, and financing private companies in the lower middle market, connecting 4,500+ buyers and investors with 10,000+ deals annually through algorithm-driven matching.

Target users:
Lower middle market dealmakers: PE Firms · Family Offices · Independent Sponsors · Investment Bankers · Corporate Acquirers (USD 2.5M+ annual revenue targets)

Pricing:
Subscription

Key features:
- Algorithm-driven deal-matching by investment criteria
- Confidential deal marketing with NDA workflow
- 4,500+ financial and strategic investors
- Multiple transaction types (sales, recaps, growth capital)
- Leaderboards and closed deal badging

What sets it apart:
- Largest lower middle market deal marketplace - 10,000+ deals per year with proprietary matching algorithms
- Strong confidentiality and access controls built into the deal marketing process
- Closed deal badges and leaderboards help buyers efficiently evaluate advisor track records

AI Capabilities:
N/A

Integrations:
Primarily standalone marketplace.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

BACKWELLTECH.

Backwell Tech Corp. Europe

(Backwell Tech Corp. Europe GmbH)

backwelltechcorp.com

Sourcing | HQ: Germany | Founded: 2019

Backwell Tech is a Berlin-based software company building AI systems that help businesses make more profitable decisions, faster, and with greater confidence.

Backwell Tech Corp., based in Berlin, develops predictive and explainable AI (xAI) software for enterprise decision-making, including demand forecasting, customer intelligence, pricing optimization and a Mergers & Acquisitions analytics module that explores acquisition opportunities for corporate expansion. The company serves mid-size and large enterprises across manufacturing, retail, energy, telecom and other industries, with a scientific advisory board drawn from Cambridge, Oxford and Imperial College.

Target users:
Corporate M&A · SME Owners

Pricing:
Enterprise AI analytics suite priced on request based on modules (M&A, demand forecasting, pricing) and deployment scale.

Key features:
- Explainable AI (xAI) predictive models
- AI-powered software
- Mergers and Acquisitions analytics module
- Production Intelligence and Demand Intelligence
- Customer Intelligence
- Pricing Intelligence

What sets it apart:
- Explainable AI instead of black-box models
- EU AI Act-compliant, Europe-based operations
- Academic advisory board (Cambridge, Oxford, Imperial)

AI Capabilities:
Proprietary algorithmic models with explainable AI (xAI), continuous model monitoring, applied to predictions, operative forecasting, customer analytics, pricing optimization and financial transaction opportunity identification.

Integrations:
N/A

More information on **manda.co**

More information on **fintalent.com**

BANKERS DEALS
Deal Discovery Simplified ®

Bankers Deals

bankersdeals.com

Sourcing | HQ: Canada | Founded: 2019

Bankers Deals is a cloud and mobile M&A deal discovery platform using data-driven matching to connect middle and lower-mid market buyers and sellers, giving advisors and investors a broader, more transparent origination channel.

Founded in Toronto and focused on the middle and lower M&A market, Bankers Deals aims to make deal discovery more transparent and efficient by digitizing how deals and counterparties find each other. The platform augments traditional relationship networks with a broader, algorithm-driven marketplace, giving advisors and buyers a wider funnel of opportunities. It positions itself as a "Match.com for dealmakers".

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
Mixed model – one-time registration fee per posted opportunity plus 30-day subscription plans for contact credits; pricing ranges from free trials to around USD 120–300 per month per opportunity or buyer profile, with separate registration fees and no success fees.

Key features:
- Online deal discovery platform where buy- and sell-side users can list mandates and search for relevant opportunities in just a few clicks.
- Focus on middle- and lower-market deals with anonymized listings to protect confidentiality while signaling key deal attributes.
- Matchmaking algorithms that help connect buyers and sellers based on sector, size, and geography.
- Tools to manage outreach and communication, reducing reliance on purely relationship-driven sourcing.
- Cloud-based, mobile-ready solution that provides global deal visibility beyond local networks.

What sets it apart:
- Specialized in mid-market – Tailored eligibility and criteria for mid-sized mandates.
- Algorithmic discovery – Patent-pending algorithms suggest matches dynamically.
- Accessible pricing – Low-friction monthly tiers and pay-per-opportunity registration suit frequent and occasional users alike.

AI Capabilities:
Emphasizes "data driven algorithms" and "patent pending data driven algorithms" that dynamically match buyer and seller preferences and assist in real-time deal discovery, indicating algorithmic intelligence embedded in the platform. These capabilities prioritize relevant opportunities and counterparties rather than relying solely on manual search.

Integrations:
Operates as a standalone cloud platform accessible via web and mobile, and can be used alongside CRMs and email systems for outreach.

More information on **manda.co**

More information on **fintalent.com**



Boopos

boopos.com

Sourcing | HQ: USA | Founded: 2020

Boopos is a marketplace and financing platform for buying and selling profitable SaaS and online businesses, combining vetted listings, valuations and non-dilutive acquisition loans so entrepreneurs can execute smaller M&A transactions without traditional bank or equity funding.

Founded in late 2020 in Miami, Boopos operates at the intersection of online business M&A and fintech. It helps buyers and searchers acquire SaaS, e-commerce, and other digital businesses by offering flexible, revenue-based financing, and works closely with brokers and listing platforms to pre-underwrite opportunities and shorten deal timelines. After originating more than 100 million USD in non-dilutive loans, it was acquired by Founderpath in an eight-figure deal and now maintains its existing portfolio while directing new deals to Founderpath's SaaS-focused financing platform.

Target users:
End client (sell side) · M&A Advisory · Private Equity · Search Funds

Pricing:
Lending-based model with interest and fees on acquisition loans; Boopos structures facilities and pricing individually based on the target, buyer, and risk profile.

Key features:
- Revenue-based acquisition financing that can fund up to ~80% of qualifying online business acquisitions with flexible repayment tied to revenue.
- Fast underwriting process where Boopos can pre-approve targets in as little as 48 hours.
- Marketplace of pre-underwritten listings in partnership with leading brokers and platforms, giving buyers visibility into opportunities that already qualify for financing.
- Analytical tools and proprietary underwriting models that evaluate both targets and buyers to manage risk.
- Integrated partnerships with brokers and online business marketplaces transacting billions annually.

What sets it apart:
- Embedded finance – Combines deal sourcing and acquisition loans tailored to SaaS and online businesses.
- Non-dilutive capital – Lets buyers acquire companies without giving up equity or providing personal guarantees.
- Speed – Data-driven process cuts approval and funding times compared with banks and SBA loans.

AI Capabilities:
Uses proprietary data models and analytics to underwrite target businesses and buyers rapidly, leveraging integrations with merchant accounts and financial platforms to automate much of the risk assessment.

Integrations:
Integrates with online business brokers and marketplaces (e.g., Empire Flippers, FE International, Quiet Light and others) and connects to merchant accounts and financial data sources to underwrite targets.



More information on **manda.co**

More information on **fintalent.com**



✓ Verified by vendor

Caena

caena.io

Sourcing | HQ: UK | Founded: 2019

Caena is a fundraising automation and dealflow platform where founders can quickly create financial models and investment materials while investors use filtering and matching tools to discover relevant early-stage deals across emerging and developed markets.

Founded in the UK, Caena provides a lightweight financial planning, modelling, and dealflow automation layer for early-stage startups and the investors that back them. By combining templated financial models, funding readiness content, and an investor matching engine, it aims to reduce friction in venture financing and make both sides of the market more efficient. It now serves thousands of startups and a growing investor base through automated modelling and a funding marketplace, with strong adoption in markets such as Nigeria, UAE, Kenya, South Africa and India.

Target users:
End client (sell side) · Venture Capital

Pricing:
Subscription – freemium model for founders, with core financial modelling and fundraising features available for free and premium features starting around 10 GBP per month; investors likely pay for advanced dealflow and filtering capabilities via SaaS-style subscriptions.

Key features:
- Automated financial modelling that lets founders generate projections, charts, and key metrics in under 30 minutes without deep finance knowledge.
- Funding readiness tools and educational content that improve financial literacy and help founders structure their raises.
- Funding marketplace where founders can create concise pitch teasers and match with investors whose theses align with their profile.
- Investor tools for deal sourcing and evaluation, including dashboards and portfolio views.
- Focus on frontier markets and diverse founder communities, expanding investor access beyond traditional hubs.

What sets it apart:
- Reduces friction and time cost of early-stage financial planning.
- Helps investors discover curated startups aligned with their thesis.
- Bridges the gap between educational content and actionable funding tools.

AI Capabilities:
Caena describes its offering as fundraising "automation," using rules and algorithms to match startups and investors and to auto-generate financial models and teasers, although it does not heavily brand these capabilities as AI; underlying logic still functions as intelligent deal and document automation.

Integrations:
Exports financial models and reports to spreadsheets for sharing with investors and advisors; can be used alongside founders' existing accounting and CRM tools.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

conclusia.

conclusia

conclusia.io

Sourcing, Market Intelligence & Data | HQ: Germany | Founded: 2021

conclusia turns market theses and existing documents into qualified longlists of acquisition targets, add-ons and buyers – combining customizable AI search, live data enrichment and personal case support.

conclusia turns an investment thesis, market definition, example company or uploaded document into a qualified universe of acquisition targets, add-on opportunities or strategic and financial buyers. Teams can refine the market interactively, qualify companies with live-enriched data and export Excel longlists, PDF market reports and company profiles. The combination of customizable AI search and personal case support helps M&A advisers, private equity, family offices and corporate M&A teams cover complex and niche markets more systematically and move faster from hypothesis to outreach.

Target users:
M&A Advisory · Private Equity · Corporate M&A · Family Offices

Pricing:
Flexible SaaS subscriptions and project-based engagements priced according to user seats, data volume and analysis scope.

Key features:
- Customizable AI-powered search
- Interactive market definition and refinement
- Live-enriched company qualification
- Personal case support
- Export-ready longlists and market reports
- Proprietary search & enriched data via MCP

What sets it apart:
- Systematic market coverage through customizable search logic
- Interactive qualification supported by live-enriched company data
- Personal case support and export-ready deliverables

AI Capabilities:
Proprietary AI-based search technology identifies and qualifies relevant companies, while live enrichment adds user-defined, project-specific data points across the entire company universe.

Integrations:
Upload Excel lists, PDFs and company profiles to start or refine searches; export results as Excel longlists, PDF market reports and company profiles. conclusia's proprietary search technology and enriched data are available via MCP. Native CRM integrations are coming soon.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

DEALCIRCLE

DEALCIRCLE

dealcircle.com

Sourcing | HQ: Germany | Founded: 2018

DEALCIRCLE is a technology-based M&A service that uses a proprietary buyer database and intelligent matching algorithms to connect sell-side advisors with suitable buyers for lower-mid-market transactions.

Founded in 2018 in Hamburg, DEALCIRCLE addresses inefficiencies in buyer identification for smaller and mid-market M&A deals. Its data-driven service combines algorithmic matching with human oversight to generate targeted buyer lists, helping advisors increase close rates and reduce manual research. Since 2025, DUB (Deutsche Unternehmerbörse) also belongs to the DEALCIRCLE group and is Europe's leading platform for successful company succession.

Target users:
M&A Advisory · Corporate M&A · Private Equity · Family Offices · Corporates · MBI Investors

Pricing:
Mixed model – free use of list generation. Buy-side pays fee when a deal is closed with a seller from DEALCIRCLE.

Key features:
- Large buyer database – Over 5M buyers, including family offices, PE, MBI and corporates.
- AI-supported matching – Intelligent algorithms create automated longlists of potential buyers based on mandates, investment profiles, deal signals and market insights.
- Analyst-refined shortlists – In-house analysts refine AI longlists into curated shortlists, with advisors controlling which buyers are approached.
- Sell-side and buy-side tools – For advisors, streamlines buyer identification; for buyers, provides a deal-sourcing feed of relevant projects.

What sets it apart:
- Saves advisors significant time on buyer research.
- Increases the likelihood of finding off-radar but relevant buyers.
- Offers a free-to-use model for advisors and buyers, with success-based fees instead of retainers.

AI Capabilities:
Uses intelligent matching algorithms to score and rank buyers from a 5M+ profile database against each mandate, with humans refining final shortlists.

Integrations:
Integrates with advisors' workflows via exports and confidential teaser sharing; can be used alongside CRMs and data rooms.

More information on **manda.co**

More information on **fintalent.com**

Deale

deale.es

Sourcing | HQ: Spain | Founded: 2021

Deale is a digital marketplace that helps SMEs, investors, and advisors find, evaluate, and close SME M&A deals more efficiently.

Founded in Barcelona, Deale positions itself as the first SME-focused digital M&A marketplace in Europe. It combines a curated deal marketplace, workflows, and advisory support to make SME transactions more accessible to both local and international buyers.

Target users:
Corporate M&A · End client (sell side) · M&A Advisory · Private Equity · Venture Capital

Pricing:
Mixed model - subscription fees paid by companies, investors and advisors to access Deale, plus a success fee charged on completed transactions with monthly payments offset against the final success fee.

Key features:
- Online marketplace listing thousands of SMEs across sectors, with filters by size, sector, and location.
- Tools for investors to manage pipelines and track deals, reducing time to close and transaction costs compared to traditional M&A.
- Advisor workflows to generate mandates and manage multiple deals simultaneously.
- Support and content for first-time sellers unfamiliar with M&A processes.
- Focus on lower-mid-market transactions with guided workflows to complete deals in under 120 days.

What sets it apart:
- Gives SME owners a path to exit that is faster and more transparent.
- Provides investors a curated funnel of SME deals.
- Allows advisors to scale beyond their immediate local networks.

AI Capabilities:
Deale publicly emphasizes the use of technology and AI to accelerate processes and act as a "translator" of M&A language for entrepreneurs and investors, using data and algorithms to surface relevant opportunities and compress time-to-close.

Integrations:
Primarily a stand-alone marketplace that exports data and reports; used alongside advisors' own CRMs, VDRs, and communication tools rather than via deep native integrations.

More information on **manda.co**

More information on **fintalent.com**

DEALSTREAM

DealStream

dealstream.com

Sourcing · Origination | HQ: USA | Founded: 1995

DealStream is a global deal sourcing marketplace connecting 620,000+ members across 200 countries with business-for-sale, real estate, and financial asset listings.

Long-running online deal sourcing marketplace connecting 620,000+ members across 200 countries with listings spanning businesses for sale, real estate, financial assets, and funding sources, using an AI recommendation engine to surface relevant deals.

Target users:
Business Buyers · Sellers · Brokers · Intermediaries across the Lower End of the Market · Including Business-for-Sale · Real Estate · Franchise · and Capital-Raising Deals Worldwide

Pricing:
Free / Subscription

Key features:
- Search Genius AI recommendation engine learning from browsing and inquiry behavior
- Daily personalized deal digest by email
- Free-to-join model with a paid Pro Buyer tier for full seller contact access
- AI-driven deal marketing emails to matched buyer prospects (60% open rate)
- Listing categories beyond traditional M&A, including real estate, franchises, and funding sources

What sets it apart:
- One of the oldest online deal marketplaces, operating continuously since 1995
- Search Genius AI engine pushes matched deals to buyers and matched buyers to sellers, rather than relying on passive listings
- Broader scope than typical business-for-sale sites, covering real estate, franchises, and capital-raising alongside M&A

AI Capabilities:
Search Genius uses AI to track each member's viewing and inquiry activity, predict which deals they'll find relevant, and surface those matches through the platform and a daily email digest; AI-driven prospect targeting also powers outreach emails when sellers market a deal.

Integrations:
N/A (standalone marketplace; deal inquiries and contact are handled within the platform)

More information on **manda.co**

More information on **fintalent.com**

Deutsche Unternehmerbörse

✓ Verified by vendor

DUB – Deutsche Unternehmerbörse dub.de

Sourcing | HQ: Germany | Founded: 2011

DUB.de is Europe's leading platform for company succession that combines listings, expert content and advisory networks to help SMEs find successors, buyers and franchise opportunities.

Operating since 2011, DUB.de combines a business marketplace with media and community features to support SME succession and M&A in the European market.

Target users:
End client (sell side & buy side) · M&A Advisory (sell side & buy side)

Pricing:
Free for the sell side (both business owners and advisors) and fee-based for the buy side (you only pay the fee in the case of success)

Key features:
- Online marketplace with anonymous listings for SMEs and succession cases.
- Editorial content, guides, and valuation resources for business owners.
- Tools and services for business brokers and advisors.
- Partnerships with German media and business networks to extend reach.

What sets it apart:
- Offers SME owners a trusted European platform for succession.
- Gives buyers curated access to European mid-market companies.
- Leverages media partnerships for high visibility.

AI Capabilities:
AI supported offer generation

Integrations:
Primarily operates as an online marketplace; used alongside advisors' CRMs and data rooms rather than via native software integrations.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Empire Flippers

empireflippers.com

M&A Intermediary | HQ: USA | Founded: 2010

Empire Flippers is a leading curated marketplace and M&A advisory for online businesses, combining strict vetting, deep digital expertise and full-service migrations for buyers and sellers globally.

Empire Flippers focuses on profitable online businesses, combining technology, vetting, and hands-on advisory to create a trusted marketplace. Empire Flippers began as AdSense Flippers around 2010 and pivoted to the Empire Flippers marketplace in 2012; it is headquartered via a US entity in Delaware with operations in Davao and a distributed team.

Target users:
End client (sell side) · M&A Advisory for digitally native businesses (media, agencies, saas, ecommerce)

Pricing:
Success-based commission structure with decreasing percentage at higher deal values.

Key features:
- Rigorous vetting process that accepts only a small fraction of submitted listings. Rejects 94% of all seller submissions.
- Detailed standardized P&L preparation, traffic verification, and valuation support.
- Buyer network valued over USD14 billion in investable liquidity and advisory support through negotiations and closing.
- Escrow, migration, and post-sale support to ensure smooth transfers.
- Increasing use of AI-assisted buyer matching based on historical CRM data to match buyers with sellers and vice versa.

What sets it apart:
- Reduces risk for buyers by screening businesses deeply.
- Helps sellers access a global buyer base.
- Uses data and emerging AI tools to improve matching.

AI Capabilities:
Uses AI-assisted buyer matching, leveraging historic CRM and behavioral data to connect buyers with suitable listings more efficiently.

Integrations:
Primarily operates as a web marketplace and internal CRM-driven brokerage.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

ENTRX

entrx.de

Sourcing | HQ: Germany | Founded: 2024

ENTRX is a successor-focused matching platform for German SME business succession.

ENTRX is a German business succession platform focused on potential successors, using a matching model to connect aspiring entrepreneurs with companies seeking a successor.

Target users:
End client (sell side) · Successor / Buyer

Pricing:
Registration for successors is free; ENTRX is compensated through success fees and service packages around successful matches.

Key features:
- Online registration for potential successors with definition of personal preferences and criteria.
- Continuous monitoring of the market for succession opportunities matching those criteria.
- Anonymous matching and blind profiles for suitable target companies.
- Support and guidance from first match through transaction closing.
- Options to find co-founders or partner successors to form a successor team.

What sets it apart:
- Helps increase the pool of qualified successors.
- Reduces search effort for buyers and sellers.
- Provides structured, anonymised matching.

AI Capabilities:
N/A

Integrations:
Primarily operates as its own online marketplace and advisory model; no specific software integrations are promoted.

More information on **manda.co**

More information on **fintalent.com**

equimatch.ai

equimatch.ai

Sourcing | HQ: Germany | Founded: 2024

EquiMatch is an AI-native, success-fee-only origination partner that uses AI-driven research and personalised outreach to surface and contact off-market targets that match a buyer's thesis.

EquiMatch simplifies proprietary M&A origination by turning high-level investment criteria into curated long-lists and warm introductions, positioning itself as an AI-powered origination team for PE and corporate buyers.

Target users:
Private Equity · Corporate M&A · M&A

Pricing:
Service-based pricing - proprietary M&A origination service. Operates exclusively on buy-side mandates. No conflicts of interest model: buyer identity never revealed to targets without consent, each introduced target reserved for one buyer at a time.

Key features:
- End-to-end sourcing – Covers target identification, scoring, outreach and vetted introductions.
- 360° company analysis – Deep analysis of products, customers and context, plus owner and shareholder profiling.
- AI-driven research – Combines structured data, web scraping pipelines and LLM-assisted enrichment to find companies traditional databases miss.
- Tailored messaging – Uses CRM intelligence to craft tailored messages for outreach.
- Success-fee model – Pure success fee; clients pay only when a deal closes.

What sets it apart:
- Fully aligned incentives via success fees.
- AI-enhanced proprietary deal flow.
- Combines research, scoring and outreach in one service.

AI Capabilities:
EquiMatch.AI uses AI-powered proprietary M&A origination - from market scanning to qualified off-market introductions. Focus on platform and add-on acquisitions with pre-qualified off-market deal flow matching buyer thesis.

Integrations:
Operates as a managed origination service interfacing with clients' CRMs and communication tools.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Valu8 by Grata

valu8group.com

Sourcing / Diligence | HQ: Sweden | Founded: 2011

Valu8 by Grata is a leading European private-market intelligence platform now integrated into Grata's global private markets platform, providing deep financial and ownership data to accelerate sourcing, screening and analysis of European and global private companies. Products includes login platform, API, MCP and agentic solutions.

Valu8 by Grata is an intelligence solution (platform, API and agentic/MCP) that aggregates financials, ownership structures and transaction intelligence for European and global private companies, helping deal teams screen, analyse and monitor targets & finding sellers and buyers. Since 2026, Valu8 is part of Datasite Grata's global private market intelligence business and product solutions, serving 700+ customers for M&A, PE, KYC/AML, credit and sales use cases.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · Investment Banking · Strategy consultancy & KYC/AML

Pricing:
Subscription – SaaS licensing and API access priced by seats, coverage and usage; primarily targeted at financial institutions and corporates.

Key features:
- Deep European and global coverage – In-depth ownership and company financial data for 70 M European private companies and 100 M companies globally.
- Semantic search – Search companies in plain language across ownership, financials, sectors and other attributes.
- Deep company profiles – Structured financials, ownership, filings and M&A transaction history.
- Smart target screening, buyer list building and seller intent signals
- Comparison – Flexible screening and side-by-side comparison of companies using consistent data.
- Market and ownership mapping & M&A market signals – Tools to map sectors, portfolios and ownership relationships to spot signals, trends and opportunities.
- API and Agentic/MCP access, connecting Valu8 deep company data to all major LLMs (Claude, ChatGPT, Copilot etc.), CRM solutions and client systems.

What sets it apart:
- Unmatched depth on European private companies.
- Serves both front-office and risk use cases.
- Now expanded globally via Datasite/Grata integration.

AI Capabilities:
Valu8 by Grata & Grata uses advanced AI technology throughout the entire value chain, from enriching structured datasets with unstructured and alternative datasources - to product development and platform user functionalities and agentic/MCP customer solutions.

Integrations:
API and agentic/MCP access, connecting Valu8 deep company data to all major LLMs (Claude, ChatGPT, Copilot etc.), CRM solutions and client systems.

More information on **manda.co**

More information on **fintalent.com**

GROWTHPAL

Growthpal

growthpal.com

Sourcing | HQ: India | Founded: 2019

AI-led deal sourcing platform that surfaces validated, off-market acquisition targets for corporate development teams.

GrowthPal is an AI-powered M&A deal sourcing platform that helps corporate development and strategy teams identify off-market acquisition, acqui-hire and strategic investment targets from a database of over 3 million companies. It converts acquisition theses into data-driven mandates, scores target fit using signals such as hiring, web traffic and funding history, and combines AI shortlisting with analyst validation. In January 2026 the company raised USD 2.6M to scale its AI-led sourcing engine.

Target users:
Corporate M&A · Private Equity · Venture Capital

Pricing:
M&A mandate and deal-sourcing packages tailored per client, with quotes provided after scoping (no public SaaS price list).

Key features:
- AI-powered mandate creation from natural-language theses
- Off-market target discovery across 3M+ companies
- Contextual signal scanning (hiring, traffic, funding, leadership)
- Predictive fit scoring and growth-adjacency recommendations
- Human-in-the-loop analyst validation of founder intent
- Detailed target profiles covering product, team and culture

What sets it apart:
- Focus on off-market, founder-validated targets
- AI shortlisting combined with human analyst validation
- 125+ corporate development teams across US, Europe, Asia

AI Capabilities:
Uses NLP to turn acquisition theses into mandates, agentic AI for deep company research, and predictive scoring over continuous market signals to rank acquisition targets.

Integrations:
N/A

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

MADISCOVER

MADiscover

madiscover.com

Sourcing | HQ: Austria | Founded: 2019

MADiscover is an AI-powered M&A screening solution that translates strategic rationales into dynamic landscapes for data-driven searches of strategic partners and M&A targets, supporting corporate development teams.

MADiscover replaces static, manual M&A target lists with an AI-based, interactice Strategic Landscape, a live cockpit that translates a company's strategic rationale into a screened, ranke dashboard that is continouosly updated with market insights. It solves three classic screening fallacies: strategy getting lost in translation into database search logic, limited scope / bias from manual, network-dependent searches, and results going stale the moment market dynamics or strategy changes.

Target users:
Corporate M&A · Corporate Strategy · Private Equity · Mid-market Companies · Fortune 500

Pricing:
Subscription + longlist-size based fee, no consulting hours or transaction commissions.

Key features:
- Strategy-driven: starts where financial KPI- and network-driven screening ends, creating adaptive scoring against custom strategic criteria.
- Comprehensive & objective: global search with local lens on off-market SMEs, using predictive & AI algorithms to quantify strategic fit.
- Dynamic: adaptive landscapes evolve when priorities shift or new criteria emerge, ensuring insights always reflect the latest strategic context.
- Continuous monitoring: eliminating repetitive manual work with custom quarterly rescreenings capturing emerging targets.

What sets it apart:
- Scaling strategic screening.
- Free from bias, local networks, or outdated classifications like SIC codes.
- Provides transparent criteria and strategy-driven results.

AI Capabilities:
MADiscover combines big data, AI, and human expertise for strategic market screening and M&A Landscape Analytics. Expert-validated dashboards over tens of thousands of screened companies in real-time across 150+ countries.

Integrations:
Delivers outputs to clients' internal tools and workflows; specific integrations not detailed.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

ProxDeal

proxdeal.com

Sourcing | HQ: Germany | Founded: 2024

The best DACH company data worldwide and the most precise longlisting on the market. ProxDeal is the new generation of company database: 7M+ companies with 100+ parameters each, financials even for non-disclosing companies, shareholder trees down to UBOs, succession signals, and AI longlists in under 5 minutes, accessible via platform, API, and MCP.

ProxDeal is the new generation of company database: an AI-native data engine, not a static record store. Every DACH company with register data, multi-year financials, shareholder trees down to UBOs with exact stakes, and live web-verified intelligence, enriched with estimates, succession signals, fit scores, risk scores, and multiples. On top: the most precise longlisting on the market. AI agents turn the data into ranked buy-side and sell-side longlists with 100+ parameters in under 5 minutes, each match explained. The result: 95% less research time, 3x higher response rates, deal opportunities before they hit the market.

Target users:
M&A Advisory · Corporate M&A · Private Equity · Family Offices

Pricing:
Subscription (SaaS) plus usage-based API access; details on request.

Key features:
- The best DACH data worldwide: 7M+ companies, 992M+ data points, 100+ parameters per profile.
- The most precise longlisting: context-aware semantic search plus LLM match analysis find exactly the right companies, even in the narrowest niches, with explainable reasoning, in under 5 minutes.
- Financials no one else has: multi-year filings plus AI-modeled revenue and EBIT estimates for non-disclosing companies.
- Full ownership transparency: shareholder trees with exact stakes, down to ultimate beneficial owners (UBOs).
- The best signals: succession signals, fit scores, risk scores, multiples. Deal flow before the market sees it.
- European M&A deals for buyer matching and PE theses.
- Agent-native: full data API and MCP server.

What sets it apart:
- Deepest DACH coverage worldwide: all companies in DACH with structured financials (daily updated), shareholder structures, and Mittelstand long-tail depth that generic databases miss.
- AI agents, not static lists: every longlist is researched fresh for the mandate by 1000+ parallel AI analysts, delivered in minutes (96h of research saved per longlist)
- The most precise longlisting: AI-native, context-aware, every match explained, results in under 5 minutes, agent-ready via API and MCP.

AI Capabilities:
Proprietary Hyper-RAG-AI built for M&A: semantic search plus LLM match analysis deliver ranked longlists with transparent reasoning in under 5 minutes. AI agents verify company data live, model revenue and EBIT estimates for non-disclosing companies, and classify business models across 12 dimensions. Succession and ownership signals built in. Specialized for DACH, GDPR and EU AI Act compliant.

Integrations:
Data API and MCP server (Claude and other AI assistants, CRMs, internal tools); Excel and PDF export with 100+ parameters; outreach templates and contact data.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Sourceco

sourcecodeals.com

Sourcing | HQ: USA | Founded: 2022

SourceCo is a US buy-side deal sourcing firm that uses AI to surface off-market, founder-led acquisition targets and connect them with vetted buyers.

SourceCo is a Miami-based buy-side acquisition search firm and off-market deal sourcing platform. It uses AI-driven data analysis to identify founder-led companies (roughly USD 2M–USD 200M) and connect them directly with vetted buyers such as private equity firms, corporate development teams, search funds and family offices. Business owners pay no fees; the model is buyer-compensated.

Target users:
Private Equity · Corporate M&A · SME Owners · End client (sell side)

Pricing:
Free for business owners; buyer-compensated, with optional retainers for dedicated searches (no public price list)

Key features:
- AI-powered buyer-seller matching
- Access to off-market deal flow (marketplace) for SourceCo vetted buyers
- Custom target dataset generation for buy-side theses
- Direct founder introductions without brokers or auctions
- Business valuation calculator
- Zero-fee model for sellers
- Optional retainers for thesis-driven searches

What sets it apart:
- Exclusively off-market, proprietary deal flow
- Free for business owners; buyer-compensated model
- AI signals on ownership transitions and hiring activity

AI Capabilities:
AI models analyze industry data for acquisition patterns - growth, ownership transitions, hiring activity and strategic fit - to surface off-market targets and match them with aligned buyers.

Integrations:
Primarily accessed via web interface with CSV/Excel export

More information on **manda.co**

More information on **fintalent.com**

Sourcescrub

Sourcescrub

sourcescrub.com

Sourcing | HQ: USA | Founded: 2015

Sourcescrub is a sources-first, AI-powered deal sourcing platform that connects millions of private companies to 290k+ proprietary sources, enabling investors and deal teams to systematically discover, score and engage high-fit targets.

Sourcescrub, now combining with Grata, is used by 700+ firms and 35 of the top 40 private market investors to institutionalize "new school" origination with continuous, sources-first intelligence on private companies across sectors and regions.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · Investment Banking

Pricing:
Subscription – enterprise SaaS licensing priced by user seats, data modules and delivery (platform, integrations, custom research), with tailored quotes provided via Sourcescrub sales; no public rate card.

Key features:
- Sources-first data – 17M companies woven together with 290,000+ lists and sources for an unrivaled view of private markets.
- AI-driven platform – Purpose-built AI capabilities that support discovery, scoring and workflows from origination through diligence.
- On-demand data ops – Expert-in-the-loop teams for list building, enrichment and custom research on top of the core platform.
- Profile+ quality standard – Deep, multi-source validated company profiles to keep CRM and pipeline data accurate.
- CRM integrations & Data Connect Cloud – Native integrations and delivery options so data flows into CRMs and analytics stacks.

What sets it apart:
- Sources-first data model that captures founder-owned and niche companies missed by legacy terminals.
- AI-native platform plus expert research to maintain quality.
- Tight CRM and workflow integration so origination data directly powers deal processes.

AI Capabilities:
Sourcescrub offers SourcingGPT, a generative AI solution trained on its sources-first dataset to help dealmakers research markets, create lists and generate insights on targets, plus AI features embedded throughout discovery, scoring and workflows.

Integrations:
Native CRM integrations and "Data Connect Cloud" APIs for major CRM and analytics environments; detailed system list sits in dedicated integrations content.

More information on **manda.co**

More information on **fintalent.com**

Stabwechsel

stabwechsel

stabwechsel.de

All | HQ: Germany | Founded: 2011

Stabwechsel is a specialised succession platform that reverses the traditional marketplace model by presenting vetting successors instead of companies for sale, supported by a network of M&A coaches.

Founded in 2011, Stabwechsel is considered an established provider in the German-speaking succession market, focusing on curated successor profiles and professional guidance rather than anonymous listing boards.

Target users:
End client (sell side) · MBI Candidates · Strategic Buyers · Financial Investors · M&A

Pricing:
Subscription / success – Works as a broker/platform with matching and advisory services.

Key features:
- Buyer-centric marketplace – Presents handpicked MBI candidates, strategic buyers and investors with detailed search profiles rather than listing companies for sale.
- Intelligent matching – Unique matching system that proposes suitable successors based on criteria such as transaction structure, location, sector experience and financial strength.
- Coach network – Network of coaches in Germany, Austria and Switzerland who support and accompany the succession process.
- Low-threshold access – Sellers and advisors can see candidate profiles without initially disclosing the company.

What sets it apart:
- Innovative matching approach for succession.
- Strong focus on quality of successors.
- Focus on German-speaking mid-market.

AI Capabilities:
N/A

Integrations:
Used alongside advisors' CRMs and deal tools.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

transact.digital

transact.digital

transact.digital

All | HQ: Germany | Founded: 2023

transact.digital is an AI-powered private-market intelligence and sourcing platform combining curated data and AI-agents to support M&A and strategic decisions.

transact.digital is presented as a decision-support and intelligence layer for private markets, with a strong focus on AI-search and curated data for M&A and strategic decisions in German-speaking markets.

Target users:
Corporate M&A · Private Equity · M&A Advisory · Corporate Strategy · Consultants

Pricing:
Subscription: SaaS licensing

Key features:
- AI-agent & -search: Combines an AI-agent and AI-powered search with curated data.
- M&A targets & investors: Identifies M&A targets, strategic investors and market structures.
- Detailed company profiles: Provides financial statements, ownership structures and relevant contacts.

What sets it apart:
- Centralises data and AI-tools for private markets.
- Emphasis on both buy- and sell-side intelligence.
- Designed for decision support, not just raw data.

AI Capabilities:
transact.digital offers an AI-agent for research and business development processes and an AI-based classification and search for companies and their respective value creation.

Integrations:
Works as a SaaS platform, external integrations like MCP are available upon request.

More information on **manda.co**

More information on **fintalent.com**

WebsiteClosers websiteclosers.com

All | HQ: USA | Founded: 1998

Website Closers is a specialist brokerage marketplace that connects buyers and sellers of tech and internet businesses worldwide, offering sector-savvy intermediaries and a 100% success-based fee model.

Since 1998, Website Closers has grown into a large, global franchise brokerage for digital businesses, representing sellers and buyers of internet, technology and software companies while emphasizing sector expertise and hands-on advisory.

Target users:
End client (sell side) · End client (buy side) · Private Equity · Venture Capital · Corporate

Pricing:
Success-based commission only - no upfront listing fees. White-glove M&A-style advisory rather than self-serve marketplace.

Key features:
- Digital focus – Specializes exclusively in technology, internet and digital business models, from eCommerce brands to SaaS and digital agencies.
- End-to-end M&A process – Runs the entire sales process from initial evaluation and valuation through marketing, buyer selection and closing.
- Success-based fees – 100% success fee model with no retainers; fees payable only at closing.
- Large deal flow – Launches 1–2 new digital businesses for sale every business day, giving buyers broad choice.
- Lending & advisory network – Supports clients with lending, tax, legal and due diligence referrals.

What sets it apart:
- Sector-focused brokerage for digital assets.
- Structured, advisor-led exit process for founders.
- Global buyer reach with daily new listings.

AI Capabilities:
N/A

Integrations:
Works alongside buyers' and sellers' CRMs, VDRs and legal tools; no specific native software integrations are advertised.

More information on **manda.co**

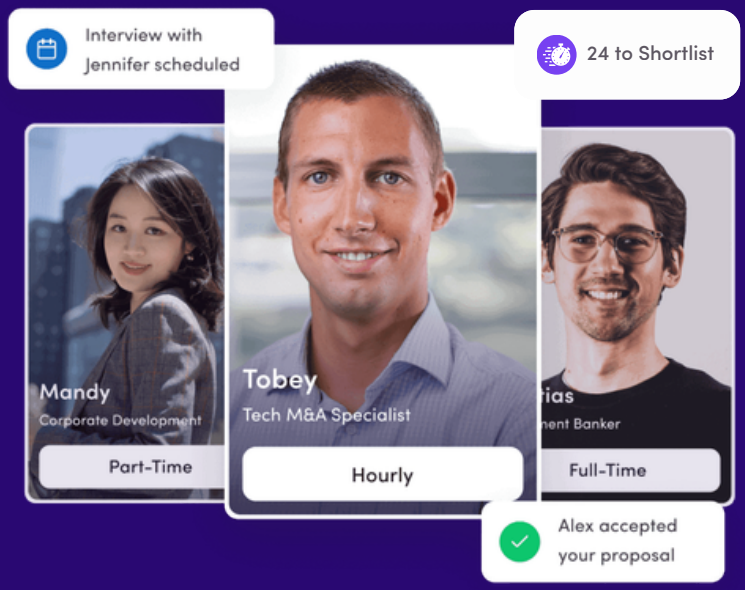
More information on **fintalent.com**

fintalent.com

THE FASTEST WAY TO FIND M&A, PMI, TRANSFORMATION, AND STRATEGIC FINANCE PROFESSIONALS

Fintalent.com connects you to a global network of 5,000+ vetted independent professionals across 52 countries within 24 hours or less.

Learn More



CORPORATE DEVELOPMENT AND M&A

VALUE CREATION & PMI

TRANSFORMATION & RESTRUCTURING

CFO SERVICES & STRATEGIC FINANCE

CHAPTER 2

Market Intelligence & Data

28 tools

Good sourcing runs on good data. The 28 platforms in this chapter aggregate private company signals, trade flows, funding events and technology footprints - and increasingly expose them through APIs, data feeds and AI connectors rather than dashboards alone. The practical question has become less "who has the data" and more "how directly does it plug into your workflow".

In this chapter: Private-Company Data · Market & Trade Intelligence · Research Platforms

✓ Verified by vendor

CBINSIGHTS

CB Insights

cbinsights.com

Sourcing | HQ: USA | Founded: 2008

CB Insights is a market intelligence platform that analyzes millions of data points on private companies, investors, patents, news, and markets to help corporates and investors understand technology trends, competitive landscapes, and deal activity.

Founded in 2008 in New York, CB Insights is widely used by corporate strategy, corporate venture, M&A, and investment teams to track private markets and emerging technologies. Its combination of structured data, analyst research, and visualization tools helps teams identify opportunities, monitor competitors, and make evidence-based strategic decisions.

Target users:
Corporate M&A · Corporate Venture Capital · Business Development · Venture Capital · Private Equity

Pricing:
Enterprise subscription; plans typically start in the mid five-figure USD range annually, with exact pricing depending on seat count, data modules, API usage, data integration mechanisms and volumes.

Key features:
- Private-company database – Data on over 12 million companies and 1,600+ markets, including funding, financials and firmographic information.
- Predictive scoring – Models that surface "future winners" earlier than traditional VC "smart money," highlighting high-potential targets.
- Visual intelligence – Strategy maps, relationship graphs and market maps to reveal emerging patterns and shifts in complex markets.
- AI agents – AI assistants that build target lists, scouting reports, memos and benchmarking analyses to speed research.
- Integrations – Data Feeds, APIs, MCPs, Snowflake, CRM and LLM connectors that embed CB Insights data and signals into customers' own tools and data stacks.

What sets it apart:
- Deep coverage of venture and growth-stage companies and investors.
- Broad cross-sector coverage useful for corporate strategy and innovation teams.
- Mix of self-service tools and analyst content.

AI Capabilities:
Product experience is driven by ChatCBI and a host of agents for Scouting Companys, Market Research, Deal Analysis, Earnings Analysis

Integrations:
Data Feed, Snowflake, API, CRM (Salesforce), MCP Server, AI Connectors for Claude, ChatGPT, Perplexity, Glean

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

ABRAMS
world trade wiki

Abrams

en.abrams.wiki

Sourcing / Diligence | HQ: Germany | Founded: 2002

A business intelligence portal that makes global customs and shipment data searchable for market, sourcing and competitive analysis.

ABRAMS world trade wiki is a business intelligence portal that aggregates global trade data, combining UN Comtrade macroeconomic statistics with customs records and bills of lading covering more than 660 million shipments from over 20 million companies in 193 countries. It is used for market, sourcing, competitive and supply-chain intelligence, for example in commercial analysis of suppliers, customers and competitors. Users include enterprises, investors, consultants, researchers and public-sector organizations.

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
Custom subscription pricing by tier (Small Business, Enterprise, Premium); quotes via sales team

Key features:
- Global trade data search (customs data, bills of lading)
- Market intelligence
- Sourcing intelligence
- Competitive intelligence
- Supply chain intelligence
- Company transparency profiles
- Logistics insights
- HS code lookup

What sets it apart:
- Shipment-level customs and bill-of-lading data at scale
- Combines UN Comtrade macro data with micro trade data
- Coverage of 193 countries and 20M+ companies

AI Capabilities:
Aggregates and structures billions of freight and customs data records using AI and algorithms.

Integrations:
Standalone data/BI portal

More information on **manda.co**

More information on **fintalent.com**

AM AnalyzeMarkets

AnalyzeMarkets analyzemarkets.com

Sourcing | HQ: UAE | Founded: 2019

AnalyzeMarkets provides AI-driven global deal intelligence, investor and company databases, and predictive "deals in the making" signals so M&A professionals can source transactions, identify counterparties, and contact decision makers across asset classes from one integrated platform.

AnalyzeMarkets is positioned as a global deals and investment intelligence platform, combining financial data, predictive deal sourcing signals, and investor databases for M&A and capital markets professionals across asset classes. Operating out of the UAE with international reach, it targets private equity, venture, corporate development, and advisory teams that need a single source for deals, counterparties, and decision makers.

Target users:
M&A Advisory · Private Equity · Corporate M&A

Pricing:
Subscription – per-user SaaS subscription priced around USD 199 per month or USD 1,999 per year, with group plans and custom enterprise arrangements available via the sales team.

Key features:
- Global investment intelligence platform combining M&A, PE, VC, joint venture, fundraising, IPO, and real estate transaction data.
- AI-powered analytics and dashboards that help deal teams identify, screen, and track opportunities across private and public markets.
- Investor and company databases that support deal sourcing, investor targeting, and market mapping.
- Focused coverage and expertise in the Middle East and North Africa alongside broader global datasets.
- Web-based interface with filters and alerts to monitor sectors, geographies, and asset classes relevant to M&A and PE.
- Tools for exporting and integrating data into internal models and workflows.

What sets it apart:
- AI-powered financial data – The platform emphasizes big data, proprietary algorithms, and deep learning to identify opportunities and patterns across global deals.
- Full-stack deal intelligence – Combines transactions, companies, investors, and professionals in one SaaS environment covering multiple asset classes and geographies.
- Research and analyst support – Supplements the dataset with research reports and on-demand analyst work for clients needing bespoke insights.

AI Capabilities:
Markets itself as an AI financial data and investment intelligence platform using big data, proprietary algorithms, and deep learning techniques to surface opportunities and insights across M&A and related asset classes.

Integrations:
Exports and API; details on request

More information on **manda.co**

More information on **fintalent.com**

ARC

✓ Verified by vendor

ARC Intelligence

arc-intelligence.de

All | HQ: Germany | Founded: 2024

ARC Intelligence is the AI-native Finance OS for mid-market groups and Private Equity funds: live financial and operational data from every entity and every ERP in one platform, built for performance monitoring, value creation and M&A readiness.

Founded in 2024 in Berlin, ARC Intelligence replaces the typical patchwork of consolidation tools, controlling spreadsheets and BI dashboards with one AI-native platform. ARC connects ERP, CRM and pre-systems across all legal entities and delivers live group financials (P&L, balance sheet and cash flow) with drill-down to the journal entry. An AI layer answers ad-hoc questions in minutes, links results to their operational drivers and automates recurring reporting end to end. Implementation takes about four weeks.

Target users:
Private Equity & Portfolio Companies · Corporate M&A · CFOs of Mid-Market Groups

Pricing:
Transparent SaaS pricing per legal entity and per connected system, all-inclusive with users, implementation and support. No consulting projects, no hidden migration costs.

Key features:

- Live group financials: P&L, balance sheet and cash flow across every entity and every ERP, drill-down to the journal entry.
- AI controlling: ad-hoc questions answered in minutes, every answer traceable, step by step.
- Financial and operational drivers combined: once all financials are live, operational KPIs are added on top to explain the drivers behind the numbers. ARC answers the why, not just the what.
- End-to-end automation: from data retrieval to the finished, approved report in the executive's mailbox, on schedule.
- Error detection at scale: misbookings, VAT, order intake vs. revenue. ARC has uncovered errors that would have cost clients millions.

What sets it apart:

- AI-native, not AI-added: built around AI agents, not extended by a chatbot.
- Live at the source: no exports, no stale numbers, no reconciliation between consolidation software, controlling Excel and BI.
- Built for finance teams, not data engineers: no consultants required to ask a new question.
- One platform replaces the stack of consolidation tool + BI + spreadsheets. One fee, everything included.

AI Capabilities:
AI agents work on a unified semantic layer across all connected systems: data integration and matching, ad-hoc analysis in natural language, root-cause explanations and fully automated report writing. Every answer is auditable, step by step.

Integrations:
Connects to the ERP, CRM, accounting and pre-systems of mid-market groups, e.g. SAP (incl. S/4HANA), Microsoft Dynamics, DATEV and others, via connectors and APIs. Several ERPs in one group are the standard case.

More information on **manda.co**

More information on **fintalent.com**

Bloomberg

Bloomberg

bloomberg.com

All | HQ: USA | Founded: 1981

The market-standard financial data and analytics terminal that supplies deal, market and company intelligence across the M&A lifecycle.

Bloomberg L.P. is a global financial data, news and analytics provider best known for the Bloomberg Terminal, which delivers real-time market data, company financials, news and communication tools to financial professionals. For M&A practitioners it offers deal databases, league tables, comparable company and transaction analysis, and market intelligence used across sourcing, valuation and execution. The company is headquartered in New York.

Target users:
Investment Banking · M&A Advisory · Corporate M&A · Private Equity · Asset Managers · Venture Capital

Pricing:
Standard Bloomberg Terminal contracts typically cost about 2,000–2,665 USD/month per terminal (≈24,000–31,980 USD/year), with volume discounts for multi-terminal deployments; exact pricing via Bloomberg quote.

Key features:
- Bloomberg Terminal with real-time market data
- M&A deal database and league tables
- Company financials and estimates
- Comparable company and transaction analysis
- News and research
- Instant Bloomberg messaging network
- Excel add-in / API access
- Data License enterprise data feeds

What sets it apart:
- Breadth and depth of real-time global market data
- Integrated news, analytics and messaging in one terminal
- Widely used M&A deal database and league tables

AI Capabilities:
Bloomberg has developed AI capabilities including BloombergGPT, a finance-specific large language model, and AI-powered features in the Terminal such as automated earnings call summaries.

Integrations:
Integrates via Bloomberg API/B-PIPE with Excel, Python/R, in-house systems, and execution platforms; widely used alongside OMS/EMS and risk systems.

More information on **manda.co**

More information on **fintalent.com**

Comparables.ai

Comparables

comparables.ai

Sourcing / Valuation | HQ: UK | Founded: 2023

An AI-driven company data and market intelligence platform for M&A screening, deal sourcing and valuation benchmarking.

Comparables.ai is an AI-powered market intelligence and M&A deal sourcing platform covering a global database of more than 370 million companies. It provides comparable company search, private company financials, ownership data, M&A transaction history and valuation multiples for investment banks, private equity firms, corporate finance teams and analysts. AI features generate company profiles, answer custom questions about company lists and score targets against user-defined criteria.

Target users:
Investment Banking · M&A Advisory · Private Equity · Corporate M&A · Asset Managers

Pricing:
Freemium: Free tier at 0 USD/month (limited results and filters); Premium plans with full data and AI features priced via quote

Key features:
- Global database of 370M+ companies
- AI-generated company profiles (AI Insights)
- Natural language company and market search
- M&A transaction database with 10-year history
- Trading multiples and valuation ratios
- Private company financials and ownership structures
- AI relevancy scoring of targets
- Financial benchmarking and peer analysis

What sets it apart:
- AI-native search replacing traditional industry code screening
- 370M+ company coverage including private companies
- Freemium access model unusual among M&A data providers

AI Capabilities:
Uses AI for natural language company search, AI-generated company profiles from website analysis, custom AI columns/questions on company lists, and automated relevancy scoring against deal criteria.

Integrations:
No integrations with third-party tools.

More information on **manda.co**

More information on **fintalent.com**



coresignal

coresignal.com

Sourcing | HQ: USA | Founded: 2016

Coresignal provides large-scale public web data on companies, professionals and jobs, giving deal teams and data products an AI-ready source for screening, tracking and modeling market participants.

Founded in 2016 and headquartered in New York, Coresignal focuses on making fresh, structured web data accessible to investment firms and enterprises. Its data is commonly used for signal generation in sourcing, market intelligence, and risk monitoring use cases.

Target users:
Corporate M&A · Private Equity

Pricing:
Subscription – customized data licensing and SaaS-style access based on dataset types, volumes and delivery methods; exact prices are quoted on request.

Key features:
- Multi-source datasets – Fresh web data on 75M+ companies, 800M+ professionals and hundreds of millions of job postings, updated continuously.
- Delivery options – Bulk datasets, APIs and flat files tailored to data, product and AI teams.
- Enriched, AI-ready data – Cleaned, mapped and enriched records designed for machine learning, scoring models and analytics use cases.
- Signals & monitoring – Data to track hiring, growth, org changes and other market signals across companies and sectors.
- Compliance & sourcing – Emphasis on "public web data" and ethical sourcing to support compliant downstream use.

What sets it apart:
- Helps teams build proprietary signals instead of relying solely on off-the-shelf platforms.
- Useful across sourcing, monitoring, and risk workflows.
- Designed for data engineering and quant teams as well as business users.

AI Capabilities:
Offers AI-ready datasets and AI-powered tools such as an Agentic Search API, AI-powered search, and an MCP server that let AI agents and applications query and enrich large-scale B2B web data in natural language.

Integrations:
Integrates into client data stacks via APIs, flat-file deliveries, and connections to cloud storage and data warehouses.

More information on **manda.co**

More information on **fintalent.com**

crunchbase

Crunchbase

crunchbase.com

Origination | HQ: USA | Founded: 2007

Crunchbase is a predictive company intelligence database tracking 4M+ companies, funding rounds, investors, and acquisitions.

Predictive company intelligence database tracking 4M+ companies, funding rounds, investors, and acquisitions, powered by live data from 80M+ users and AI-driven signals.

Target users:
Startup Investors · VC/PE Professionals · B2B Sales and Business Development Teams · Corporate Development · Journalists

Pricing:
Subscription

Key features:
- 4M+ company and investor profiles
- AI-powered Predictions & Insights for fundraising/acquisition likelihood
- AI agent for natural language market research
- CRM integrations with auto-enrichment
- Customizable funding/milestone alerts

What sets it apart:
- Largest community-validated startup database with 80M+ users creating a self-reinforcing data flywheel
- Lowest entry price point (USD 99/month Pro) among major financial intelligence platforms
- AI-driven predictive signals (fundraising likelihood, acquisition probability) add forward-looking intelligence

AI Capabilities:
AI agent enables natural language market segment queries. Predictions & Insights uses pattern matching to predict fundraising and M&A activity. Auto-enrichment uses AI to keep CRM records current.

Integrations:
Salesforce, HubSpot, Pipedrive, LinkedIn Sales Navigator, Slack, Zapier, REST API

More information on **manda.co**

More information on **fintalent.com**



Datarade

datarade.ai

Sourcing | HQ: Germany | Founded: 2018

Datarade is a B2B data marketplace and commerce platform that connects data buyers and providers globally, with a particular focus on high-quality datasets for AI training, analytics and market intelligence.

Founded in 2018 in Berlin, Datarade aims to bring transparency and efficiency to the global commercial data market. It helps enterprises source external data from a large pool of providers while benchmarking quality and pricing, and supports governance around external data spend. It has raised over 1M EUR in seed funding from investors such as HTGF and HPI.

Target users:
Corporate M&A · Private Equity

Pricing:
Marketplace and platform fees based on data purchases and enterprise usage.

Key features:
- Data marketplace – Platform to discover and compare data products from 500–2,600+ providers across 600+ categories (financial, geospatial, firmographic, AI training data, etc.).
- Data buyer tools – Profiles, sample previews, pricing info and buyer guides to help data buyers evaluate vendors efficiently.
- Monda – SaaS platform enabling data providers to build and manage their own data commerce businesses (listings, pricing, delivery, customer management).
- Matching & transparency – Intelligence that matches buyers with relevant providers and benchmarks offerings, making the external data market more transparent.
- Focus on AI data – Strong positioning around high-quality datasets for AI training and fine-tuning, with 50k+ monthly users searching for AI-ready data.

What sets it apart:
- Reduces time and friction in finding suitable data vendors.
- Helps buyers avoid low-quality or misrepresented datasets.
- Gives data providers a centralized channel to reach enterprise buyers.

AI Capabilities:
Uses AI and automation to classify, match, and surface relevant datasets and providers to buyers, and to power comparison and recommendation features in the marketplace.

Integrations:
Integrates with customer data stacks via APIs and download/export mechanisms; partners with quality-scoring providers like Truthset to expose accuracy metadata.

More information on **manda.co**

More information on **fintalent.com**

dealroom.co

Dealroom.co

dealroom.co

Sourcing | HQ: Netherlands | Founded: 2013

Dealroom.co is a startup and VC intelligence platform that uses advanced data science and real-time tracking to help investors, corporates and governments understand innovation ecosystems and identify promising companies for investment and acquisition.

Founded in 2013 in Amsterdam, Dealroom.co has become a reference platform for understanding startup and innovation ecosystems, especially in Europe. It combines structured data, predictive algorithms, and partnerships with governments and innovation agencies.

Target users:
Asset Managers · Corporate M&A · Private Equity · Venture Capital · Governments

Pricing:
Annual subscription, priced by tier, seats and modules. Enterprise and API access on request. Current pricing at dealroom.co/pricing.

Key features:
- Global company graph – Millions of companies tracked with funding, valuations, business models and growth indicators.
- Advanced data science – Real-time tracking and proprietary scoring to surface emerging trends and promising companies.
- Ecosystem dashboards – Custom portals for cities, regions and corporates to visualize startup and innovation ecosystems.
- Tools for investors & M&A – Target lists, market maps and signal-based discovery to support deal sourcing and strategic analysis.

What sets it apart:
- Helps dealmakers discover off-radar startups.
- Supports government and ecosystem stakeholders with data-driven decisions.
- Complements traditional company databases with richer startup context.

AI Capabilities:
Uses machine learning and predictive algorithms to score companies, forecast trajectories, and power discovery and ecosystem analytics.

Integrations:
Integrates into clients' data stacks via APIs and exports to BI tools and CRMs; also connects to some dealflow tools as a data source.

More information on **manda.co**

More information on **fintalent.com**

Domo

domo.com

All | HQ: USA | Founded: 2010

Domo is a cloud-native data platform that helps organizations connect, govern and activate their data with dashboards, data apps and AI agents, including use cases in M&A analytics and portfolio monitoring.

Domo, founded by Josh James in 2010 and headquartered in American Fork, Utah, is a public cloud BI and data products company that has expanded from dashboards into integration, apps and AI agents used by global enterprises. Domo positions itself as an AI and data products platform that helps organisations connect any data source, build live dashboards, and automate workflows with AI.

Target users:
Corporate M&A · Private Equity

Pricing:
Enterprise subscription pricing based on users, data volume, and modules.

Key features:
- 1,000+ pre-built cloud connectors plus on-prem connectors and APIs.
- Unified data preparation, governance, and transformation to make data AI-ready.
- Dashboards, apps, and alerts for operational and executive reporting.
- Domo AI features including AI Chat and AI-powered workflows to automate decisions and processes.
- Data writeback and embedded analytics to push insights back into operational systems.

What sets it apart:
- Gives deal and finance teams a unified view of performance.
- Supports scenario analysis and KPI tracking.
- Powers AI-assisted insights and alerts across functions.

AI Capabilities:
Domo AI and AI Chat provide conversational insights, AI-powered workflows, and automated decisioning on live integrated data.

Integrations:
Salesforce; Workday; Google Analytics; Snowflake; BigQuery; Redshift; Excel and CSV via connectors; plus 1,000+ other systems.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

EMIS

isimarkets.com/emis

All | HQ: UK | Founded: 1994

EMIS is an emerging markets research platform combining industry, company, news and deals data so investors and corporates can assess opportunities and risks in high-growth markets with confidence in markets where reliable information is hard to access.

Product of ISI Markets, EMIS provides deep insights grounded in local intelligence for smarter decisions in high opportunity, information-scarce markets. With over 30 years of experience and information specialists based in-country, EMIS delivers trustworthy intelligence covering more than 370 industry sectors and 18 million companies across 197 markets– providing everything you need in one place as actionable insights are facilitated by leading technology.

Target users:
Asset Managers · Corporate M&A · M&A Advisory · Private Equity · Venture Capital

Pricing:
Subscription – enterprise licenses for corporates, financial institutions, governments and universities; pricing tailored to number of users, coverage and modules.

Key features:
- Trusted multi-country, multi-sector intelligence – Coverage of 197 markets and 370+ industry sectors with 4,000+ sources.
- AI-powered research – EMIS combines machine learning, and generative AI to speed up research, elevate discovery and surface high-value intelligence
- Deals intelligence – Combined industry, company and deals data supporting investment decisions, particularly for emerging markets
- Unrivalled private company intelligence - Access to consistent, comparable financials, and historical data of private companies in emerging markets
- Role-specific workflows – Solutions for market intelligence, business research, M&A & investment, credit & risk, sales & marketing and academic research.

What sets it apart:
- Helps dealmakers assess private companies and markets in high-growth but opaque regions.
- Speeds analysis through Excel and screening tools.
- Supports cross-country comparisons and benchmarking.

AI Capabilities:
EMIS combines machine learning, and generative AI to speed up research, elevate discovery and surface high-value intelligence you can trust. Users can engage with EMIS intelligence directly using AskISI, EMIS' AI research assistant.

Integrations:
Excel Add-in; APIs and data fees; integration with client apps, systems and AI applications and tools

More information on **manda.co**

More information on **fintalent.com**

FACTSET

FactSet

factset.com

Origination | HQ: USA | Founded: 1978

FactSet delivers comprehensive market, company, and transaction data with deep Excel and API integration for investment and M&A professionals. FactSet's Marketplace is a curated hub of proprietary and third-party datasets for investment, analytics and research teams, rather than an M&A software workflow tool.

FactSet serves over 240,000+ users globally with modular solutions for public and private markets, emphasizing integration into client workflows and models. FactSet launched the Open:FactSet Marketplace to extend its core fundamentals with alternative data feeds, reinforcing its role as an integration-friendly data provider for quant and fundamental investors.

Target users:
Asset Managers · Corporate M&A · M&A Advisory · Private Equity · Venture Capital

Pricing:
License-based pricing tailored to content sets, users, and delivery methods.

Key features:
- FactSet Workstation/Workspace for market data, fundamentals, research, screening, and analytics.
- Excel Add-in with dynamic, refreshable content (financials, estimates, ownership, etc.).
- APIs and Formula API for programmatic access and integration into models and internal systems.
- M&A data feeds and tools, including Mergers Data-Feed with hundreds of thousands of transactions.
- Office Cloud Refresh and automation capabilities for model updates.

What sets it apart:
- Modular a la carte pricing - unusual granular control over data sets vs. major terminals
- Deep buy-side workflow integration with portfolio management, risk, and compliance in one platform
- Strong open data/API ecosystem allowing data portability into proprietary workflows

AI Capabilities:
Provides AI-ready data and supports ML workflows; also increasingly embeds AI and automation features in analytics and screening, though core value is data and integration. ChatIQ (generative AI assistant), Document Intelligence (AI-driven analysis), Chart Explainer (AI-generated chart narratives). Also integrates third-party AI tools via open API.

Integrations:
Integrates into client systems via data feeds, APIs and FactSet's platform; marketplace data is designed to plug into quant models and analytics stacks; integration into Python/R and internal systems.

More information on **manda.co**

More information on **fintalent.com**



Gain

gain.ai

Sourcing / Diligence | HQ: Netherlands | Founded: 2018

Private market intelligence platform delivering investment-grade data on private companies, investors and deals for dealmakers.

Gain (former Gain.pro) is a private market intelligence platform founded in Amsterdam in 2018 by Frister Haveman and Nicola Ebmeyer. It combines proprietary research, sourcing technology and AI to help investors and advisors find, understand and track private companies, investors and deals. The platform covers hundreds of thousands of company profiles, 20,000+ investors and 500,000+ deals and is used by 400+ enterprise clients including leading PE firms, M&A advisors and consultancies.

Target users:
Private Equity · M&A Advisory · Corporate M&A · Investment Banking · Legal · Asset Managers

Pricing:
Per-user SaaS licensing for private-market intelligence with free trials, but pricing details only available by contacting the vendor.

Key features:
- Proprietary private company profiles with financials
- Investor and portfolio tracking (20,000+ investors)
- Deal database (500,000+ deals) and advisor league data
- AI agent for natural-language queries
- CRM sync, Excel add-in and API feeds
- ·Sector and market landscaping tools

What sets it apart:
- Human-curated, investment-grade private company data
- Integrated AI agent across interlinked datasets
- Used by top PE firms, advisors and consultancies

AI Capabilities:
An AI agent („Gain Agent") answers natural-language queries against the platform's interlinked private-market datasets, processing 50,000+ AI-powered queries daily.

Integrations:
CRM sync, Excel add-in, API



More information on **manda.co**

More information on **fintalent.com**



Grasp

Grasp AI

grasp-ai.com

All | HQ: Sweden/ UK | Founded: 2020

Grasp is an AI Analyst platform that automates end-to-end financial research tasks for deal teams, from scanning millions of sources to building longlists and slides.

Grasp is a generative AI platform for finance professionals that automates company and market research for investment banks, private equity firms and consultants through an "AI Analyst" agent system. Backed by venture investors and supports thousands of M&A, PE and consulting professionals, Grasp is aiming to reduce human hours on financial research to "almost zero" while improving output quality.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital

Pricing:
Subscription – Enterprise SaaS pricing for banks, PE firms and consultancies, negotiated based on seats and usage.

Key features:
- AI Analyst agent system – Uses tools like a human analyst to source information, wrangle data in spreadsheets and build polished PowerPoint decks end-to-end.
- Buyer & target workflows – Automates buyer lists, target searches and long/shortlist generation for mandates.
- Market mapping – Analyses tens of millions of company websites and data sources to map markets and competitors.
- Proprietary datasets – Access to 100M+ private companies, 1M+ M&A deals and integrated market data within Grasp.
- Presentation automation – Drafts client-ready presentations, freeing human teams for higher-value tasks.

What sets it apart:
- Agent-based AI that mirrors analyst workflows.
- Huge proprietary datasets to drive research.
- Demonstrated time savings and throughput gains for deal teams.

AI Capabilities:
Grasp's AI Analyst automates end-to-end PE workflows - from thematic platform sourcing to add-on deal screenings to commercial due diligence - in minutes, not days. Builds long/short-lists, analyzes companies in detail, generates PowerPoint outputs.

Integrations:
Integrates with spreadsheet tools and presentation workflows; specific CRMs or VDR integrations are not detailed publicly.

More information on **manda.co**

More information on **fintalent.com**

Inex One

inex.one

Sourcing | HQ: Sweden | Founded: 2018

Inex One is an expert network and survey marketplace that lets deal and strategy teams run all their expert calls and surveys in one AI-enabled platform, reducing cost and admin while improving insight capture.

Inex One positions itself as the leading "insights platform" for expert networks and B2B surveys, used by >8,000 professionals and rated highly on G2; case studies highlight 40–50% admin and cost savings versus traditional expert network usage. Inex One has extended its AI layer to help users synthesize expert-call transcripts and extract citations from research outputs.

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
Usage / Pay-per-use model for expert calls and surveys with central invoicing; pricing depends on networks and scope, with platform fees embedded.

Key features:
- Multi-network marketplace – Access to 20–30+ expert networks and survey firms globally through a single interface.
- Centralised workflow – One platform to brief projects, manage experts, schedule calls and track deliverables with "inbox-zero" messaging.
- AI transcripts & summaries – Automatic transcriptions and AI summaries of calls, with the ability to LLM-chat across transcripts in a private library.
- Smart surveys – Tools to engage top survey vendors, compare quotes and multi-source samples for B2B and healthcare surveys.
- Consolidated billing – Pay-per-use with a single invoice per project instead of multiple network contracts.

What sets it apart:
- Simplifies expert network procurement.
- Cuts admin and ENS costs materially.
- Adds AI analytics on top of calls and surveys.

AI Capabilities:
Inex One uses AI to transcribe and summarise expert calls and enables LLM-style chat across transcripts, helping teams extract themes and answers from many interviews quickly.

Integrations:
Connects to 30+ expert networks and survey vendors; call scheduling and transcription integrate with calendars and conferencing tools.

More information on **manda.co**

More information on **fintalent.com**

kona equity

konaequity.com

Sourcing | HQ: USA | Founded: 2020

Search-driven private company intelligence engine for sourcing and screening millions of US SMEs.

Kona Equity is a private company intelligence engine covering millions of small and medium-sized US private businesses. It aggregates data points on revenue, growth, employees and technologies and offers keyword search, filtering and executive contact sourcing. The platform is used for deal sourcing, sales prospecting and market research by investors, corporate development teams and advisors.

Target users:
Private Equity · Corporate M&A · Investment Banking · M&A Advisory

Pricing:
Premium: USD 50/month (includes 5 users)

Key features:
- Private company profiles with revenue and growth estimates
- Keyword-based company search and filtering
- Executive contact information sourcing
- Weekly data updates on 10,000+ companies
- Machine-learning-driven data analysis and visualization
- Coverage of 2.5M+ small and mid-sized private businesses

What sets it apart:
- Low-cost access to SME revenue estimates
- Simple search-engine-style user experience
- Weekly refreshed data on thousands of companies

AI Capabilities:
Applies machine learning and algorithms to analyze millions of data points on company revenue, growth, employees and technologies.

Integrations:
REST API for embedding company data into CRMs, deal pipelines and internal applications.

More information on **manda.co**

More information on **fintalent.com**

Mergermarket

Mergermarket
(ION Group)

mergermarket.com

Sourcing | HQ: UK | Founded: 2000

Mergermarket, part of ION Analytics, blends expert journalism, machine learning and decades of Dealogic data to deliver early signals of potential M&A opportunities, deals, threats and challenges.

Mergermarket is positioned as a key competitive intelligence tool for M&A professionals, helping them identify opportunities and threats earlier than mainstream news.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Investment Banking · Law Firms

Pricing:
Subscription – News and analytics subscriptions for deal professionals; pricing not disclosed publicly.

Key features:
- Predictive M&A signals – Delivers insights on deals 6–24 months before they become public knowledge.
- Human + machine – Combines market-leading human insights with advanced machine learning.
- Rich data backbone – Leverages over 30 years of Dealogic M&A data.
- Part of ION Analytics – Integrated with other analytics and data solutions within ION.

What sets it apart:
- Unique early-stage M&A insight.
- Trusted by global deal professionals.
- Backed by robust data and AI.

AI Capabilities:
Uses advanced machine learning on 30+ years of data to power predictive analytics for M&A, complemented by human insight.

Integrations:
Integrated into ION Analytics platforms; can feed into client workflows via web and feeds.

More information on **manda.co**

More information on **fintalent.com**

mergr

Mergr

mergr.com

Sourcing / Origination | HQ: USA | Founded: 2008

Mergr is a human-researched, daily-updated database connecting private equity firms, corporate acquirers, M&A transactions, and the advisors who work on them.

Mergr was founded in 2008 by Sam Nelson as a niche database of private equity firms, after Nelson ran into the same problem firsthand while sourcing acquisition targets at two Los Angeles-based PE firms: existing research tools were either incomplete, expensive, or required a lengthy sales process. The platform has since expanded into a broader resource covering public and private companies, their M&A activity, and the legal and financial advisors connected to those deals. Mergr's research team adds new records, transactions, and connections daily, and the company is explicit that it does not partner with or license data from outside third parties, positioning its internally sourced, human-verified data as the core differentiator against larger, automated competitors.

Target users:
Investment Bankers · Business Brokers · Accountants · Lawyers · Executive Recruiters · Corporate Development Groups · Wealth Advisors · Business Owners Researching Private Equity Firms · Corporate Acquirers · M&A Transaction History

Pricing:
Subscription

Key features:
- Detailed profiles for private equity firms, corporate acquirers, and advisors with investment criteria and transaction history
- Full-text search across 100,000+ M&A press releases
- Custom lists built on firm criteria, investment focus, or acquisition activity
- Company search by current ownership, past acquisitions, or divestitures
- Transaction search by target, industry, deal size, acquirer type, or seller type

What sets it apart:
- All data is sourced and verified in-house by a human research team, with no third-party data licensing
- New records, transactions, and connections added every day rather than updated periodically
- Single-purpose focus on the interconnected web of PE firms, acquirers, and advisors, rather than a broader research platform

AI Capabilities:
N/A

Integrations:
N/A (standalone web database)

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

MODELYZR
THE GAME CHANGER

Modelyzr

modelyzr.com

All | HQ: Germany | Founded: 2015

MODELYZR is an AI-powered market and M&A intelligence platform that enables data-driven target screening, commercial due diligence, market potential assessment and revenue synergy analysis within minutes instead of months.

MODELYZR helps corporate development teams, private equity firms and strategic acquirers make faster and more reliable commercial due diligence and acquisition decisions. By combining CRM, ERP and other internal enterprise data with external market data into a unified AI-powered market model, the platform validates commercial assumptions, quantifies Total Addressable Market (TAM) and revenue opportunities, supports the evaluation and prioritization of acquisition targets, and uncovers revenue synergies throughout the M&A lifecycle. Beyond M&A, MODELYZR enables strategic growth planning, market expansion and commercial excellence through a single, data-driven view of market opportunities.

Target users:
Corporate Strategy · Corporate M&A · Private Equity · Asset Managers · B2B

Pricing:
Subscription. Pricing depends on number of users, countries and integrated data sources. Available upon request.

Key features:
- Commercial Due Diligence Analytics: Quantifies Total Addressable Market (TAM), market potential and revenue opportunities to validate commercial assumptions during due diligence.
- Revenue Synergy Analysis: Identifies cross-selling, upselling and whitespace opportunities across combined customer and product portfolios
- Market Potential Simulation: Simulates market potential and validates commercial assumptions to support investment decisions.
- Post-Merger Integration Support: Enables rapid go-to-market planning by combining customer, product and market data into one unified market model.

What sets it apart:
- AI-powered market validation for commercial due diligence
- Revenue synergy identification across the M&A lifecycle
- Unified AI-powered market model integrating internal enterprise and external market data

AI Capabilities:
MODELYZR's Market AI integrates and analyzes internal enterprise and external market data to detect market patterns, quantify market potential and revenue opportunities, identify revenue synergies, and simulate commercial growth scenarios for strategic M&A decision-making.

Integrations:
Securely integrates enterprise ERP and CRM environments, such as SAP, together with additional internal data and external market data into a unified AI-powered market model.

More information on **manda.co**

More information on **fintalent.com**

MOODY'S

✓ Verified by vendor

Orbis

(Moody's / formerly Bureau van Dijk)

moodys.com/orbis

Sourcing | HQ: USA | Founded: 1991

Orbis, now part of Moody's, is a global database of 635M+ companies with standardized financials, ownership structures, M&A data and risk indicators, used to find, analyze and compare companies worldwide.

Formerly a Bureau van Dijk's flagship product, Orbis evolved into Moody's core private company data backbone, underpinning many corporate finance, risk and compliance solutions while also serving as a primary source for M&A target searches.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · Investment Banking · Banks · Governments · Professional Services

Pricing:
Subscription - Enterprise licenses for banks, corporates, advisors and public institutions, with pricing based on coverage, modules and delivery (web, API, bulk); terms are negotiated with Moody's rather than publicly listed.

Key features:
- Global coverage - Data on more than 635 million entities, mostly private, from 170+ sources.
- Standardized financials - Treated and globally standardized financial statements for cross-border comparison.
- Corporate ownership trees - Extensive beneficial ownership, hierarchies and historic links with over 2B ownership connections.
- Orbis M&A - Integrated M&A deals and rumours database for corporate finance and target screening.
- Risk & compliance - Content for AML/KYC, supplier risk, credit and transfer pricing workflows.

What sets it apart:
- Recognized standard for global private company data.
- Strong M&A module integrated with core data.
- Supports deal sourcing, credit, AML, supplier risk and tax.

AI Capabilities:
Orbis' high-quality data is explicitly marketed as a foundation for AI and advanced analytics, with content and tools supporting AI model grounding, financial strength models and risk scoring.

Integrations:
APIs, bulk feeds, industry connectors, and web interface; integrates into risk systems, CRMs and analytics platforms.

More information on **manda.co**

More information on **fintalent.com**

PALTURAI

Palturai

palturai.com

All | HQ: Germany | Founded: 2014

Palturai's BusinessGraph is an AI-ready relationship and risk intelligence graph that helps financial and corporate users identify sales opportunities, predict company sales events and detect fraud networks in their ecosystems.

Palturai focuses on financial services, corporates and authorities that need to enhance sales efficiency and fraud prevention; the BusinessGraph provides transparent relationship views built on public data with AI-driven algorithms at scale.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · Banks · Insurance · Public Sector

Pricing:
Subscription – Enterprise licensing for financial institutions, corporates and public authorities with pricing based on scope and integration; details are shared via demos rather than public tariffs.

Key features:
- BusinessGraph – Vast graph of companies, individuals and relationships built from high-quality public data and condensed into a unique data model.
- Relationship intelligence – Helps teams see customers and partners as part of a dynamic network, not isolated entities.
- AI-powered algorithms – Suite of AI models running on the BusinessGraph for use cases such as sale prediction, fraud detection and "Shortest Path" networking.
- Fraud and risk insights – Tools like Distance2Trouble and Fraud Prediction Index to uncover fraud networks and risky relationships.
- Sales acceleration – Warm-intro mapping and lead targeting that can cut sales cycles by 50% and reduce research time by up to 90%.

What sets it apart:
- Purpose-built business relationship graph.
- AI models packaged for sales and fraud use cases.
- Strong European financial services and public-sector references.

AI Capabilities:
Palturai explicitly positions BusinessGraph as the ideal platform for AI-powered algorithms, including company sale prediction, fraud prediction, cash-event detection and shortest-path networking.

Integrations:
Integrates into client workflows and CRMs via APIs and connectors; Salesforce integration and APIs

More information on **manda.co**

More information on **fintalent.com**

PitchBook

PitchBook

pitchbook.com

Sourcing · Origination | HQ: USA | Founded: 2007

PitchBook is a leading private markets intelligence platform that underpins deal sourcing, diligence and portfolio analysis across VC, PE and corporate development teams.

PitchBook is a financial data and research platform providing detailed data on companies, investors, funds, deals and people across venture capital, private equity, M&A and public markets. It was acquired by Morningstar in 2016. PitchBook is widely considered a premier data provider for private and public equity markets, used by 60,000+ professionals worldwide to support sourcing, due diligence, valuation and market analysis.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · Investment Banking · Corporates

Pricing:
Subscription – enterprise licenses priced by seats, data modules and delivery (desktop, API, feeds).

Key features:
- Detailed fundamentals, ownership, financing history and comparable companies for public and private firms.
- Deal & transaction data – Data on VC, PE, M&A and other transactions, including lead partners, valuations and multiples.
- Fund & investor profiles – Track record, fund performance, strategy and co-investment patterns for 300k+ investors and funds.
- People & relationships – Data on executives, board members and deal professionals supporting relationship mapping.
- Workflow tools – Screening, comparables, league tables, benchmarking and Excel/CRM integrations.

What sets it apart:
- Most comprehensive private market data platform - analyst-verified data at every level of the stack
- Morningstar ownership brings institutional credibility and integration with public market research
- Navigator AI provides structured, hallucination-free answers grounded in PitchBook's verified proprietary data

AI Capabilities:
PitchBook Navigator uses NLP to answer private market research queries. ML models power VC Exit Predictor and Valuation Estimates. AI-assisted monitoring and alert systems for deal flow tracking.

Integrations:
Salesforce, Microsoft Office (Excel), DealCloud, Affinity, Slack, SS&C Intralinks, Morningstar products, APIs.

More information on **manda.co**

More information on **fintalent.com**

PREQIN
a part of BlackRock

Preqin

preqin.com

Origination | HQ: UK | Founded: 2003

Preqin is a leading data and intelligence platform for alternative assets, acquired by BlackRock in March 2025 for USD 3.2B.

Leading data and intelligence platform for alternative assets covering PE, VC, hedge funds, real estate, and private debt. Acquired by BlackRock in March 2025 for USD 3.2B.

Target users:
Institutional Investors · Fund Managers · LPs/GPs in PE · VC · Hedge Funds · Real Estate · Infrastructure · Private Debt

Pricing:
Subscription

Key features:
- 135,000+ funds & 48,000+ firms database
- Performance benchmarking across asset classes
- Investor relations & fundraising intelligence
- ESG data and reporting
- Market research reports and forecasts

What sets it apart:
- Deepest alternative assets-only dataset with human-verified proprietary sourcing
- Backed by BlackRock (acquired 2025), integrating private markets data into Aladdin ecosystem
- ESG-integrated data across alternative asset classes with dedicated analytics suite

AI Capabilities:
AI-powered data extraction and analytics within Preqin Pro; ML for data enrichment and anomaly detection; partnerships with Finster AI and RavenPack.

Integrations:
Juniper Square, RavenPack, S&P Global Marketplace, API access

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

PRIVSOURCE

PrivSource

privsource.com

Origination | HQ: USA | Founded: 2019

PrivSource is a lower middle market M&A deal sourcing platform. Buyers receive live deals matched to their investment mandate; sell-side advisors see exactly which vetted buyers are looking for their deal before they share it. No success fees.

PrivSource is a lower middle market M&A deal sourcing platform. Buyers receive live deals matched to their investment mandate; sell-side advisors see exactly which vetted buyers are looking for their deal before they share it. No success fees.

Target users:
Private Equity Firms · Family Offices · Independent Sponsors · Investment Bankers · Strategic Acquirers - Lower Middle Market (USD 500K–USD 15M EBITDA)

Pricing:
Subscription

Key features:
- Deal feed matched to each buyer's mandate, sourced daily from across the market
- Sell-side buyer discovery: see how many active buyer mandates match your deal before you distribute it
- Buyer Lists: a ranked buyer universe built across the entire M&A ecosystem with verified contacts, when you want reach beyond the network
- No success fees; focus: businesses with USD 500K–USD 15M EBITDA

What sets it apart:
- No success fees or commissions - transparent flat monthly pricing (USD 300/month) unlike broker-dependent platforms
- Every buyer on the platform has a live, confirmed investment mandate. Sellers know who's actually looking before they share a deal.
- Narrow lower middle market focus with vetted deal flow and pre-screened buy-side members

AI Capabilities:
AI matches every live deal against each buyer's confirmed mandate, and builds ranked buyer lists with verified contacts.

Integrations:
MCP server available: connect PrivSource deal flow and buyer data to your own AI tools.

More information on **manda.co**

More information on **fintalent.com**

S&P Global
Market Intelligence

S&P Global Market Intelligence

spglobal.com/market-intelligence

All | HQ: USA | Founded: 1998

S&P Global Market Intelligence provides the data backbone and analytics for many M&A and investment workflows, primarily via its Capital IQ Pro platform, covering deal screening, valuation and risk analysis.

S&P Global Market Intelligence is one of S&P Global's core divisions, combining proprietary research, news, credit ratings data and technology to power financial decision-making across institutions. Its flagship desktop platform, S&P Capital IQ Pro, is the primary entry point for deal-making professionals - combining corporate, market, transaction and private capital data with screening, modeling and AI tools.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · Investment Banking · Corporates · Credit Analysts

Pricing:
Subscription, quote-only

Key features:
- Flagship platform: S&P Capital IQ Pro - financial data on 140+ metrics for 19,200+ public companies
- Ownership intelligence (49K+ companies, 35K+ institutions)
- Fixed income (29M+ securities)
- M&A deal database & transaction comparables
- 60M+ private companies and 69K+ PE/VC funds (Preqin-supplemented)
- Thousands of screening criteria for M&A and capital raising
- Excel/Word/PowerPoint add-ins and dashboards
- ChatIQ, Document Intelligence, and Chart Explainer AI tools. Division also offers credit ratings/risk data, sector intelligence and the S&P Global Marketplace for premium datasets.

What sets it apart:
- Most comprehensive financial platform globally, integrating public/private company data, transactions, credit ratings and research in one place
- Deep private capital integration (Preqin-supplemented PE/VC and fund data) alongside fixed income and risk data
- Embedded AI (ChatIQ, Document Intelligence, Chart Explainer) for natural-language querying, grounded in S&P's verified institutional data

AI Capabilities:
ChatIQ (generative AI natural-language querying), Document Intelligence (AI-powered document analysis/extraction) and Chart Explainer (natural-language chart explanations), all grounded in verified S&P data. On March 12, 2026, S&P Global announced major AI enhancements to Capital IQ Pro: acquisition of Drift AI (formerly Arkifi) for AI-powered Excel modeling automation, and ProntoNLP (acquired 2025) added for NLP sentiment analysis, plus expanded fixed income, biopharma and private markets content.

Integrations:
Microsoft Office (Excel/Word/PowerPoint add-ins), Salesforce, Bloomberg Terminal, API/data feeds (Xpressfeed), Snowflake, AWS, portfolio management systems

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

StrategyBridgeAI

StrategyBridgeAI

strategybridge.ai

All | HQ: Germany | Founded: 2022

StrategyBridgeAI is an AI-native business and market analysis platform that automates company, peer and market analysis for M&A, Strategy and Audit teams, producing traceable, presentation-ready outputs in hours instead of days.

Munich-based StrategyBridgeAI positions itself as "the new standard of business & market analysis," offering modular, scalable AI analyses that cut research time from 20–120 hours to under five hours while providing transparent, data-backed outputs suitable for board and IC discussions.

Target users:
Corporate M&A · M&A Advisory · Strategy · Audit & Valuation

Pricing:
Subscription – SaaS licensing for firms across M&A, Strategy and Audit, priced by user seats and modules; details are provided via demos and are not publicly listed.

Key features:

- Outside-in company analysis – Automated, structured analyses of companies with benchmarking, peers, market analysis, valuation & forecasting, export-ready in custom PPT-design.
- Niche market reports – Up to date market reports, especially useful for niche markets - transparent and with sources for market exploration.
- AI-driven longlists – Target, buyer and competitor screening - enabled through semantic search and independent of industry codes with precise niche filtering.
- Global coverage – Financials, KPIs, ownership structures and contact data on ~50M companies and across 100+ countries, finding even small niche players.

What sets it apart:

- Purpose-built AI engine for financial analysis rather than generic chatbots.
- Material time savings with structured, audit-ready outputs.
- Coverage across company, peer, transaction and market views in one place.

AI Capabilities:
StrategyBridgeAI calculates KPIs deterministically and uses AI specifically to turn them into actionable insights and to identify peers via semantic search for longlisting - enabling objective, modular company and industry analyses, automated benchmarking, and workflows from sourcing to red-flag due diligence with explainable outputs.

Integrations:
With MCP integration - a technology that lets StrategyBridgeAI plug directly into the tools you already use, from CRM systems to data rooms - insights flow automatically into your daily work, with no manual copying, no switching between systems, no friction.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Tracxn

Tracxn

tracxn.com

All | HQ: India | Founded: 2012

Tracxn is a publicly listed (NSE/BSE) private-market intelligence platform that helps investors and companies discover, monitor, and track startups and private companies worldwide - supporting deal sourcing, due diligence, and market mapping across 8M+ companies in 50+ countries.

Tracxn is a private-market intelligence platform that helps investors and companies discover, monitor, and track startups and private companies worldwide, covering 8M+ companies across 3,000+ sectors in 50+ countries. It supports deal sourcing, due diligence, market mapping, and competitive tracking - including for venture capital, private equity, corporate development, and investment banking teams. Founded in 2012 in Bengaluru by former venture capital investors Neha Singh (ex-Sequoia Capital) and Abhishek Goyal (ex-Accel Partners), the company is publicly listed in India (NSE/BSE).

Target users:
Venture Capital · Private Equity · Investment Banking · Corporate Development · Innovation Teams · Government & Academic Institutions

Pricing:
Subscription-based; plans published on vendor pricing page (tracxn.com/pricing)

Key features:
- Global private company database with funding and financials data
- Global funding and M&A transaction tracking
- Investor, acquirer and cap table tracking
- Live deals and deal sourcing feeds
- Analyst-curated sector taxonomies and emerging sector coverage
- Competitor mapping and benchmarking
- Sector and geography reports
- AI Assistant
- MCP integration

What sets it apart:
- Analyst-curated sector taxonomies at global scale - 8M+ companies across 3,000+ sectors
- AI automation with human-in-the-loop review for enterprise-grade data quality
- Publicly listed data vendor (NSE/BSE: TRACXN)

AI Capabilities:
AI-powered data extraction, parsing, and standardization (incl. OCR); AI Assistant for natural-language queries, due diligence, competitive landscaping, and market analysis; MCP integration for real-time access inside Claude and ChatGPT.

Integrations:
CRM platforms - Salesforce, HubSpot, Affinity, Pipedrive; Productivity tools - Google Sheets, Microsoft Excel; API access; browser extension; MCP connector for AI apps (Claude, ChatGPT)

More information on **manda.co**

More information on **fintalent.com**

GUEST VIEW

Digitalisation in M&A: the work of the BMA working group

The Digitalisation Working Group of the Bundesverband Mergers & Acquisitions (BMA) has developed into one of the most active practical platforms for work relating to the digitalisation of the M&A process in the German-speaking world. Since its inception, it has been working to digitalise the entire transaction process across all its phases. In doing so, it uses an agile approach to identify state-of-the-art practices, before going on to discuss digitalisation concepts and tools.

Throughout the M&A process
The work is consistently structured into workstreams based on three phases of the M&A process: M&A strategy, due diligence and merger integration. In workshop sessions, corporate deal teams, advisers, software providers and university representatives work together. It is this mix that creates added value: corporates report on what works in day-to-day deal-making, providers demonstrate what is possible, and researchers contextualise both.

A common benchmark for AI
The most visible outcome of the working group is the questionnaire on due diligence for AI solutions. Following the BMA Insights session on 15 June 2026, the 'Due Diligence Questionnaire – AI/ML Capabilities' was produced, providing buyers, sellers and advisers with a common framework for assessing AI capabilities.

The questionnaire follows the lifecycle of an AI solution: AI/ML strategy and components, data origin and data lineage, model development and MLOps, lifecycle and performance, agentic AI and autonomous systems, retrieval-augmented generation, AI-orchestrated workflows, as well as ethics, the EU AI Act, the GDPR and vendor management. The key factor is the approach behind it: the catalogue is shared openly with the market and is intended to serve as a common benchmark, not as a competitive advantage for individual firms.

Tool Bazaar and Exchange of Experience
In addition, the working group establishes the 'Tool Bazaar' format. Members identify their needs via a survey, evaluate providers and then examine the relevant solutions in concise sessions – for example, on target search and AI-supported company identification, featuring around ten providers. Assessment tools are also reviewed, alongside benchmarking for 'pulse checks' in integration projects. The first Tool Bazaar takes place in autumn 2026; the next one is scheduled as part of the M&A Excellence Days 2027 in Bad Vilbel, 22–24 February 2027, where the working group presents its results to the full audience.

Outlook
The working group is productive and open to new members. The BMA secretariat welcomes expressions of interest, feedback and practical contributions – active participation is expressly encouraged.



Prof. Dr. Karl Popp
Head of the Digitalisation Working Group, Bundesverband Mergers & Acquisitions gem. e.V.

CHAPTER 3

Deal Management, CRM & Pipeline

22 tools

Between the first call and the signed SPA sits the process. These 22 tools keep pipelines, relationships and workstreams in one place: deal CRMs built by ex-investors, project platforms for parallel workstreams, and relationship intelligence that mines your own inbox for warm paths. The differentiator in 2026 is how much of the admin the software does for you.

In this chapter: Deal CRM · Relationship Intelligence · Project & Process Management

✓ Verified by vendor

EKNOW

EKNOW

eknow.com

All | HQ: USA | Founded: 1998

EKNOW provides a modular, enterprise-grade M&A execution platform that replaces spreadsheets and point tools with integrated pipeline, diligence, integration and data room capabilities backed by decades of M&A playbooks and best practices. EKNOW M&A Tools is the operating system for the M&A Ecosystem.

With over 27 years of product evolution, EKNOW focuses on providing a comprehensive, configurable environment to support one-time and serial acquirers and their M&A playbooks.

Target users:
Small and Mid-sized Businesses · Rollups · Enterprise scale M&A

Pricing:
Subscription – annual SaaS fee per organization, including implementation and unlimited support; tiers include Team, Business, Enterprise and Enterprise + with pricing customized per client.

Key features:

- Complete modular toolkit – Modules for target pipeline, deal execution, due diligence, integration, collaboration, documents, reporting and more.
- Built-in playbooks – Extensive M&A playbooks, checklists, templates and Q&A frameworks embedded in the platform.
- Integrated data room – Data room capabilities linked directly with due diligence line items and templates.
- Reporting & dashboards – New r.26 release includes richer charts, dashboards and reporting for CD/IMO teams.
- SaaS with strong support – Web-based SaaS always bundled with implementation, collaborative support and unlimited tech support for a single annual fee.

What sets it apart:

- Most mature, complete, modular, scalable, and future proof out-of-the-box solution.
- Easiest to configure; easiest to buy fixed fee bundled lifetime support.
- Single system of record for M&A, divestitures, JVs, investments, restructuring and other transformational initiatiives.

AI Capabilities:
Details available upon request.

Integrations:
Integrates with corporate systems through APIs and data exchanges; commonly used alongside email, spreadsheets, and collaboration tools. Includes in-line document editing with strong access controls.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

MergerWare

mergerware.com

Pipeline / Diligence / Integration | HQ: US | Founded: 2018

MergerWare is an end-to-end M&A execution platform that helps organizations manage deals, due diligence, integrations, synergies, and divestitures in one place.

SaaS-based enterprise M&A platform covering the full deal lifecycle from deal sourcing and CRM through due diligence and post-merger integration. Trusted by Mercer, L.E.K. Consulting, and Hard Rock Cafe, NEOM, etc.

Target users:
Corporate M&A Teams · Consulting Firms managing Deal Flow · Due Diligence · Post-Merger Integration

Pricing:
Annual Subscription - Customised pricing for each customer.

Key features:
- Deal pipeline CRM and target tracking
- Due diligence management with VDR integration
- PMI and synergy management
- Task and workflow automation with customizable playbooks
- Real-time reporting and deal analytics.
- Helps buy-side as well as Sell-side advisors run their M&A exit process

What sets it apart:
- Covers buy-side and sell-side M&A end-to-end in one unified platform including a native VDR module
- Customizable playbooks allow teams to adapt workflows to different deal types and industry verticals
- AI-powered analytics and predictive insights for risk assessment and deal execution

AI Capabilities:
AI-powered analytics for deal insights, risk assessment, and predictive analysis during due diligence and PMI; AI-driven automation of due diligence workflows.

Integrations:
AWS, Microsoft Azure, API-based integrations

More information on **manda.co**

More information on **fintalent.com**

4Degrees

4degrees.ai

Pre-LOI / Sourcing | HQ: USA | Founded: 2017

4Degrees is an AI-powered relationship-intelligence CRM for private-markets and M&A teams, combining automated data capture, relationship scoring, and deal-flow management to source, track, and close more deals.

4Degrees is a relationship-intelligence CRM built for deal-driven teams in venture capital, private equity, investment banking, corporate M&A, and related industries, using AI to surface warm paths, enrich contacts automatically, and streamline end-to-end deal flow.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers

Pricing:
Subscription – per-user, per-month CRM pricing with customized quotes; exact pricing depends on firm size, configuration, and implementation.

Key features:

- Relationship intelligence & scoring – automatically analyzes email, calendar, and third-party data to score relationship strength and highlight the best warm paths to companies, LPs, and experts.
- Automated data capture & enrichment – syncs email and calendars, then uses AI and web data to auto-create and enrich contact and company profiles.
- Deal flow & pipeline management – centralizes deals, stages, tasks, and dashboards for sourcing and pipeline tracking.
- AI Assistant & MCP integrations – query CRM data in natural language and connect 4Degrees data into tools like ChatGPT and Claude.
- Campaigns & outreach – run segmented email campaigns directly inside 4Degrees.
- Multi-channel workflow extensions – work from Gmail, Outlook, LinkedIn, and Chrome with relationship data in context.

What sets it apart:

- Built by ex-investors - designed around PE/IB workflows, not adapted from sales CRMs
- Relationship intelligence layer scores and ranks connections, surfaces warm introduction paths
- Deep integrations with PitchBook, Crunchbase, and Salesforce keep deal data enriched automatically

AI Capabilities:
AI scores relationship strength across the team's full network, recommends warm introduction paths, and suggests connections based on email content. MCP protocol enables AI assistants to query live deal data.

Integrations:
Gmail, Outlook, Google Workspace, Microsoft 365, LinkedIn, Chrome, Salesforce, and data providers such as Crunchbase and PitchBook, plus MCP integrations to connect 4Degrees data into tools like ChatGPT and Claude.

More information on **manda.co**

More information on **fintalent.com**

Affinity

affinity.co

Pre-LOI / Sourcing | HQ: USA | Founded: 2014

Affinity is a relationship-intelligence CRM for private capital and M&A teams that centralizes relationship data, automates data capture, and uses AI to surface the best paths to deals.

Founded in 2014 and headquartered in San Francisco, Affinity serves thousands of private capital and corporate dealmaking organizations globally. It centralizes relationship, deal, and portfolio data in a single system, reducing manual data entry and giving teams a unified, analytics-ready view of their networks.

Target users:
Asset Managers · Corporate M&A · Private Equity · Venture Capital · Investment Banking

Pricing:
Subscription-based SaaS with per-user, per-month pricing tailored for investment and dealmaking teams; Quote-only pricing across Scale, Advanced, and Enterprise tiers.

Key features:
- Automated data capture and enrichment that syncs email and calendar activity to create and update contact and company profiles with data from dozens of external sources.
- Relationship intelligence that scores relationship strength and identifies the best warm paths to founders, executives, LPs, and other stakeholders.
- Deal and pipeline management tuned for private capital, with list-based workflows, analytics, and reporting across sourcing, active deals, and portfolio companies.
- Affinity AI, including generative AI features that summarize meetings, generate notes and snippets for memos, benchmark similar companies, and expose relationship data into tools like ChatGPT, Claude, and other MCP integrations.
- Affinity Alliances and Pathfinder to extend a firm's network through trusted partners and surface shared connections.
- Affinity Meetings to bring relationship context, note-taking, and follow-ups directly into virtual meetings and workflows.

What sets it apart:
- Network-centric design – Treats the firm's collective relationships as the core asset, not just static CRM records.
- High automation – Automatically captures, normalizes, and enriches interaction data to give teams a live picture of their market coverage.
- Private markets specialization – Deep traction and case studies with leading PE and VC firms, reflecting a strong product-market fit in deal-driven environments.

AI Capabilities:
Uses Affinity AI to automate data entry and enrichment, score and visualize relationships, surface warm introductions, generate meeting summaries and memo snippets, analyze deals, benchmark companies, and expose relationship intelligence into external AI tools via MCP. AI-powered relationship scoring and network mapping; auto-enrichment of contact/company records; AI-assisted sourcing to surface target companies; AI Notetaker for meeting summaries; Automation Builder for AI-triggered workflows.

Integrations:
Native integrations with email and calendar systems (Google Workspace, Microsoft 365), Salesforce and other systems of record, Zoom via Affinity Meetings, and AI tools via MCP (e.g., ChatGPT, Claude, Copilot, Gemini); API support for custom integrations.

More information on **manda.co**

More information on **fintalent.com**



Airtable

airtable.com

Due Diligence / Integration | HQ: USA | Founded: 2012

Airtable is an AI-native low-code platform that combines a relational database with spreadsheet usability, used by 500,000+ organizations including 80% of the Fortune 100.

AI-native low-code platform combining relational database functionality with spreadsheet usability, serving 500,000+ organizations including 80% of the Fortune 100. Launched Superagent in 2026 as a standalone AI agent product.

Target users:
Operations · Product and Business Teams at Mid-Market · Enterprise Companies building Custom Apps and Workflows without Code

Pricing:
Subscription

Key features:
- Relational database with spreadsheet UI (grid, kanban, gallery, calendar, Gantt views)
- AI-powered fields for auto-generating content and formulas
- Superagent: standalone AI agent for research and multi-step task automation
- Low-code app builder for custom internal tools
- Workflow automations with 30+ native integrations

What sets it apart:
- AI credits bundled into all plans including free tier - immediate access to AI columns, formula generation, and content creation
- Superagent positions Airtable beyond project management into autonomous AI operations
- 80% of Fortune 100 adoption demonstrates enterprise-grade scalability alongside no-code accessibility

AI Capabilities:
AI columns auto-generate content, classify records, and build formulas. Superagent (launched in 2026) is a standalone AI agent product for complex research and multi-step task execution.

Integrations:
Slack, Salesforce, Jira, Google Workspace, Microsoft Teams, Outlook, GitHub, Zendesk, Mailchimp, Zapier, Make

More information on **manda.co**

More information on **fintalent.com**

arx

arx.deals

Sourcing | HQ: France | Founded: 2013

Arx is an M&A-focused deal workspace that unites a proprietary deals and investor database, a purpose-built M&A CRM and a transactional network, helping bankers, investors and corporate M&A teams digitize how they source, track and close transactions.

Founded in 2013 in Paris by former investment bankers, Arx offers an integrated workspace for M&A and private equity professionals, enabling them to originate deals, manage pipelines, and collaborate with counterparties more efficiently. The platform combines data, CRM, and network effects to help deal teams find and close more relevant transactions.

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
Subscription-based SaaS pricing tailored to firm size, modules used (Database, CRM, Network), and user count. Arx provides quotes on request.

Key features:
- Arx Database – Financial and deal database for M&A and private equity, used to expand sourcing and accelerate execution.
- Arx CRM – Dealflow management module designed for investment bankers to manage sell-side, buy-side and consulting mandates end-to-end, with 360-degree tracking of interactions and counterparties.
- Arx Network – Transactional network that connects M&A professionals, investors, advisors and corporate teams to share opportunities and identify buy-side/sell-side matches.
- Relationship & activity tracking – Centralized contact base with Outlook synchronization, enrichment via Arx Database and detailed activity tracking across calls, meetings and tasks.
- Dashboards & analytics – Customizable dashboards and KPIs to analyze mandates, sourced deals and activity performance in real time.
- Automation & connectors – Arx CRM connectors for Zapier and Microsoft Power Automate to link with 4000+ third-party applications and automate workflows.

What sets it apart:
- Specialist positioning – Designed explicitly for M&A and private capital, not generic sales CRM.
- Ecosystem of modules – Database, CRM and Network interplay to support sourcing, execution and outreach in one stack.
- High connectivity – Off-the-shelf connectors to 4000+ apps help firms integrate Arx into existing toolchains quickly.

AI Capabilities:
Uses data and AI to power matching and recommendations in Arx Network, helping users identify relevant buyers and investors for sell-side opportunities and surface potential deals based on preferences and behavior.

Integrations:
Integrates with common productivity and CRM tools such as Outlook, Salesforce, Google Workspace Arx Database, Arx Network, Zapier, Microsoft Power Automate, and over 4000 applications reachable through its CRM connectors and automation workflows.

More information on **manda.co**

More information on **fintalent.com**



Asana

asana.com

Due Diligence / Integration | HQ: USA | Founded: 2008

Asana is a work management platform that helps organizations coordinate projects, workflows, goals, and cross-functional teams in one connected system, with AI-powered features that support planning, automation, reporting, and execution.

Leading work management platform enabling human and AI collaboration across projects and portfolios. Over 170,000 customers including Accenture, Amazon, and Anthropic use it to align teams and track organizational impact.

Target users:
Corporate M&A · Corporate Strategy · Operations · Product · IT

Pricing:
Subscription

Key features:
- Task and project management with timeline, board, list, and calendar views
- AI Studio: no-code builder for AI agent workflows
- AI Teammates: autonomous agents executing tasks across workflows
- Portfolio and goal tracking with AI insights
- Native reporting and dashboards with AI-generated summaries

What sets it apart:
- Work Graph proprietary data model enables AI Teammates to understand organizational context and act autonomously
- AI Studio provides a no-code interface for building custom AI agent workflows - no engineering resources required
- Free tier available (up to 2 users); transparent per-user pricing scaling to Enterprise

AI Capabilities:
AI Studio enables custom AI agent and workflow design. AI Teammates execute multi-step autonomous tasks. Features include task drafting, project summaries, portfolio insights, and natural language task creation. Integrates with Claude (Anthropic), OpenAI, and Microsoft 365 Copilot.

Integrations:
Slack, Microsoft Teams, Google Workspace, Salesforce, Jira, Zoom, Tableau, Power BI, GitHub, Okta, 300+ apps



More information on **manda.co**

More information on **fintalent.com**



ATLASSIAN

Atlassian

atlassian.com

Due Diligence / Integration | HQ: Australia | Founded: 2002

Atlassian provides an integrated suite of collaboration, project management, software development, and knowledge-sharing tools that help teams plan work, connect strategy to execution, and deliver projects from idea through completion.

Global software company providing collaboration tools including Jira (project tracking), Confluence (knowledge management), Trello, and Bitbucket. Serves 300,000+ customers in 200+ countries.

Target users:
Software Development · IT · Product · Project and Operations Teams · Mid-Market and Enterprise Organizations

Pricing:
Subscription

Key features:
- Jira: issue tracking, sprint planning, and agile project management
- Confluence: team knowledge base and collaborative wikis
- Trello: visual kanban boards
- Atlassian Intelligence: AI across Jira and Confluence
- Rovo: AI search and agents across all connected tools

What sets it apart:
- Best-in-class developer and IT toolchain with deepest integrations in software engineering workflows
- Atlassian Marketplace with 5,000+ apps and integrations - largest ecosystem of any project management platform
- Rovo AI agents can search across all connected tools (Google Workspace, Slack, Confluence, Jira) to surface cross-tool knowledge

AI Capabilities:
Atlassian Intelligence provides AI-assisted issue summaries, action items, and content generation in Jira and Confluence. Rovo is an AI search + agent platform that surfaces knowledge across all connected tools and can execute tasks autonomously.

Integrations:
Slack, Microsoft Teams, Google Workspace, GitHub, GitLab, Salesforce, Zoom, Figma, PagerDuty, 5,000+ Marketplace apps

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Intapp DealCloud

intapp.com/dealcloud

All | HQ: USA | Founded: 2010

Intapp DealCloud is an AI-powered deal and relationship intelligence platform that centralizes deal flow, relationship data, and firm intelligence in a compliance-aware environment for financial and professional services firms. It provides a single hub to coordinate pipelines, client and intermediary relationships, and cross-firm workflows, helping teams originate smarter, execute deals more efficiently, and grow faster.

DealCloud was founded around 2010 by deal professionals focused on private capital markets, then acquired by Intapp in 2018 and integrated into Intapp's industry-specific cloud for professional and financial services. Today, Intapp DealCloud is positioned as Intapp's flagship AI-powered CRM and deal management solution for regulated firms globally, combining original DealCloud capabilities with Intapp's governed AI and data services.

Target users:
Corporate M&A · M&A Advisory · Private Capital · Venture Capital · Asset Managers · Investment Banking · Law Firms · Corporate Development · Real Estate Investment · Financial Advisory

Pricing:
Subscription – enterprise SaaS pricing based on users, modules, and data consumption, sold directly to financial and professional services firms.

Key features:
- Relationship intelligence – continuously analyzes communications, interactions, and deals across systems (e.g., Microsoft Exchange, Google Workspace) to surface opportunities, flag risk, and recommend next steps, while showing who knows whom and how well across the firm, with relationship scoring and insights.
- Zero-entry activity capture – automatically logs emails, meetings, and related events from Outlook and other connected systems to keep CRM and pipeline data current without manual entry.
- Configurable workflows & data models – industry-specific schemas and configurable workflows standardize best practices, enforce governance, and support complex processes across private capital, banking, and advisory.
- Pipeline & deal management – end-to-end deal views, bidder lists, staffing, and analytics for sourcing, execution, and fundraising.
- Data enrichment – integrates Intapp Data and premium market feeds (e.g., Preqin, PitchBook, FactSet and S&P Global Market Intelligence) to enrich firms' own records with firmographic, transaction, and relationship data.

What sets it apart:
- Combines CRM, deal management, and embedded AI in a single platform designed for private capital and investment banking.
- Offers deep, industry-specific data models and rich third-party data enrichment within the same system, reducing manual data stitching.
- Delivers governed, enterprise-grade AI on top of sensitive client and deal data, backed by Intapp's focus on regulated firms.

AI Capabilities:
Intapp DealCloud has agentic AI powered by Celeste. Celeste can help firms to analyze firm and market data, harvest relationship metadata, score relationships, generate summaries, and recommend next actions, while enriching records with external data feeds under governed AI controls.

Integrations:
Intapp DealCloud integrates with Microsoft Outlook/Exchange and Teams, Google Workspace, Intapp Data, and premium market feeds such as Preqin, PitchBook, FactSet, and S&P Global Market Intelligence, as well as a broad range of third-party software through pre-built integrations, connectors, and APIs.

More information on **manda.co**

More information on **fintalent.com**

Microsoft Dynamics 365

Microsoft Dynamics 365

dynamics.microsoft.com

All | HQ: USA | Founded: 2016

Dynamics 365 provides an agentic CRM and ERP foundation that many corporate development and PE portfolio teams already use to track relationships, deals and post-close performance in a Microsoft-centric stack.

Dynamics 365 unifies Microsoft's CRM and ERP capabilities into a cloud-native platform that leverages agents and AI to automate processes and augment teams across front-, middle- and back-office functions. It is widely adopted in corporate finance and portfolio settings for pipeline tracking, account planning and reporting alongside core business operations.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · Investment Banking · End client (buy side) · End client (sell side)

Pricing:
Subscription – per-user licensing by app (Sales, Customer Service, Finance, Supply Chain, Business Central and others) with tiered pricing and add-ons published on Microsoft's site; enterprise agreements for large deployments.

Key features:
- Agentic CRM & ERP – Connected apps for sales, service, finance and operations that move organizations from systems of record to systems of action.
- Business process agents – Prebuilt and custom agents that autonomously qualify leads, analyze deals, reconcile accounts, manage payables and orchestrate procurement.
- Copilot & generative AI – Embedded Copilot experiences for conversational insight, content creation and workflow automation across CRM and ERP.
- Data-driven insights – Real-time analytics and AI-powered recommendations to improve revenue, customer experience and operational efficiency.
- App ecosystem – Extensive marketplace of add-ons and vertical solutions, plus tight integration with Microsoft 365, Power Platform and Azure.

What sets it apart:
- Broad, extensible platform combining CRM, ERP and AI.
- Rich ecosystem and familiarity for business users.
- Growing catalog of prebuilt agents for revenue and finance workflows.

AI Capabilities:
Microsoft Dynamics 365 2026 Release Wave 1 (April-September 2026) embeds agentic AI across the platform via Copilot. Dynamics 365 Sales Copilot draws on CRM data + M365 signals (email, meetings) to deliver contextual recommendations. New ‚Sales Agent' positioned as seller's daily command center with richer Sales Chat/Sales Home, record summaries, and Outlook/Teams integration. Microsoft 365 E7 license combo introduced for AI-focused tiers.

Integrations:
Microsoft 365, Power Platform, Azure services, hundreds of marketplace apps and industry solutions.

More information on **manda.co**

More information on **fintalent.com**

monday.com

Monday.com

monday.com

All | HQ: Israel | Founded: 2012

monday.com gives deal and integration teams a flexible, highly configurable hub for tracking pipelines, workstreams and integrations when they do not require a dedicated M&A platform.

monday.com is widely used as a flexible, no-code operating system for teams, and many M&A practitioners repurpose it as a lightweight deal pipeline, PMO and integration tracker alongside more specialized tools.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · Investment Banking

Pricing:
Subscription – per-user SaaS plans across tiers (Basic, Standard, Pro, Enterprise) with public pricing; enterprise arrangements available for larger teams.

Key features:
- Visual boards – Highly configurable boards to track deal pipelines, workstreams and integration tasks.
- Automations – No-code rules to notify stakeholders, update statuses and sync dates when deal data changes.
- Dashboards – Roll-up views across multiple boards to monitor deal volume, status and workloads.
- Apps & marketplace – Extensions and templates for CRM, projects and other workflows.

What sets it apart:
- One-click AI connectors to Anthropic's Claude, Microsoft 365 Copilot, and OpenAI ChatGPT directly inside workflows
- Broadest AI agent ecosystem among work management platforms in 2026 (Monday Sidekick, AI Agents, AI Columns)
- Multi-product platform (Work Management, CRM, Dev, Service) on a unified OS reduces tool sprawl

AI Capabilities:
AI Agents execute multi-step autonomous workflows (lead qualification, deal progression, research, risk detection). AI columns auto-categorize and summarize data. Native connections to Claude, ChatGPT, and Microsoft 365 Copilot.

Integrations:
Integrates with Outlook, Gmail, Slack, Teams, Salesforce, HubSpot and many other apps via native connectors and marketplace extensions.

More information on **manda.co**

More information on **fintalent.com**

mosaia

Mosaia

mosaia.io

Pre-LOI / Sourcing | HQ: USA | Founded: 2023

Mosaia is an AI-native deal sourcing and intelligence platform deploying autonomous AI agents for industry mapping, target screening, and lead generation.

AI-native deal sourcing and intelligence platform deploying autonomous AI agents for industry mapping, target screening, and lead generation, with a marketplace of tools for data enrichment and workflow automation.

Target users:
PE · Corp Dev · Investment Teams · Family Offices

Pricing:
Subscription

Key features:
- Autonomous AI agents for industry mapping & target screening
- Marketplace of specialized tools (scraping, data enrichment)
- Buyer list generation & investor discovery
- Market research & TAM analysis; AI assistant with 10x tool marketplace

What sets it apart:
- Agent marketplace model - users deploy specialized agents for specific deal tasks
- Highly modular architecture allows custom tool combinations tailored to specific workflows
- Deep PE workflow knowledge with focus on actionable sourcing intelligence

AI Capabilities:
Autonomous AI agents for deal sourcing workflows; tool marketplace extends AI capabilities with specialized scraping, search, and data integration modules.

Integrations:
API integrations via tool marketplace; scraping and data enrichment tools

More information on **manda.co**

More information on **fintalent.com**

NAVATAR®

Navatar

navatargroup.com

All | HQ: USA | Founded: 2004

Navatar is an AI-native private markets CRM and deal operating system on Salesforce that captures firm knowledge, market intelligence and third-party data into a living intelligence layer powering origination, execution and fundraising.

Navatar has long specialized in Salesforce-based CRM for private equity and investment banking, and now positions its AI-powered operating model as a way to unify corporate finance advisory, transaction advisory, tax and other deal practices around one AI Deal Engine.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · Investment Banking · Infrastructure · Secondaries

Pricing:
Subscription – Navatar is sold as an AI-powered CRM and operating model on Salesforce with pricing tailored to firm size, configuration and modules.

Key features:
- AI Deal Engine – Salesforce-based AI engine spanning sponsor coverage, origination, buyer/target research, transaction execution and post-close relationship management.
- Zero-drag data capture – Automatically captures and updates deal, company, investor and relationship data from everyday workflows.
- Living intelligence layer – Compounding intelligence from every interaction, signal and update to drive decisions and actions.
- AI that drives execution – Turns insights into workflows, outreach, approvals and follow-ups, not just recommendations.
- Firm-wide operating model – Single, always-current system used by deal teams, investor relations and leadership across private markets firms.

What sets it apart:
- Deep specialization in private markets workflows.
- Agentic AI deeply embedded in CRM.
- Single system for deals, investors and leadership views.

AI Capabilities:
Navatar launched AI-Powered CRM Operating Model on Salesforce for Alternative Asset Managers (Feb 2026) and AI-Powered Corporate Finance Advisory CRM on Salesforce (May 2026). AI features designed for investment banks, consulting firms, PE managers, M&A advisors - built natively on Salesforce ecosystem.

Integrations:
Salesforce platform and subscribed third-party data sources; AI extends into external data to surface comps, valuations and market activity.

More information on **manda.co**

More information on **fintalent.com**



outreach

outreach.ai

Sourcing / Pipeline | HQ: USA | Founded: 2014

Outreach is an agentic AI sales execution platform that automates and analyzes multi-channel engagement, pipeline and forecasting - also applied to M&A deal origination outreach.

Outreach, headquartered in Seattle, offers an AI-powered sales execution and engagement platform that unifies prospect engagement, deal management, forecasting, coaching and revenue intelligence. Automated multi-channel sequences, conversation intelligence and autonomous AI agents help teams create and manage pipeline at scale. In the M&A context the platform is used by advisory and origination teams for systematic, trackable outreach to buyers, sellers and investors.

Target users:
M&A Advisory · Investment Banking · Private Equity

Pricing:
Outreach's sales execution platform is priced per user and feature bundle (Engage, Commit, Guide, etc.), with mid-market and enterprise plans quoted individually.

Key features:
- Multi-channel engagement sequences (email, phone, LinkedIn)
- Autonomous AI agents for prospecting workflows
- Deal and pipeline management
- Revenue forecasting
- Conversation intelligence and real-time guidance
- Coaching and performance analytics
- 90+ integrations

What sets it apart:
- Agentic AI across the full engagement lifecycle
- Combines engagement, forecasting and conversation intelligence
- Large ecosystem with 90+ integrations

AI Capabilities:
Autonomous AI agents act on behalf of sellers across the customer lifecycle; AI also powers sequencing, real-time conversation guidance, objection handling and revenue forecasting.

Integrations:
Salesforce, Microsoft Dynamics 365, HubSpot, Gmail, Microsoft Outlook, LinkedIn Sales Navigator

More information on **manda.co**

More information on **fintalent.com**

Pipedrive

pipedrive.com

All | HQ: Estonia / Global | Founded: 2010

Pipedrive provides a flexible, low-friction CRM and pipeline tool that some M&A and corporate development teams repurpose for deal tracking and outreach when they do not yet need full M&A-specific platforms.

Pipedrive is not built specifically for M&A, but is widely used by SMBs and some deal teams as a lightweight system to track inbound mandates, deal pipelines and outreach, often alongside spreadsheets and specialist tools.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital

Pricing:
Subscription; tiered pricing with annual billing.

Key features:
- Visual pipelines – Kanban-style boards with stages, values and probabilities to manage pipelines at a glance.
- Lead & contact management – Centralized records for leads, organizations and people with activity timelines and custom fields.
- Automations – Workflow rules to route leads, create follow-up tasks and send emails automatically.
- Insights & reporting – Deal-level and team-level reports and dashboards for forecasting and performance tracking.
- Marketplace – Large marketplace of apps and integrations, including email, calling and document tools.

What sets it apart:
- Easy for small teams to adopt.
- Good for deal activity discipline.
- Broad integration ecosystem.

AI Capabilities:
AI search and SmartApps recommendations support integration discovery and workflow acceleration.

Integrations:
Gmail, Outlook, Google Workspace, Microsoft 365, Zapier, PandaDoc, Leadfeeder, Kixie, and 500+ marketplace apps.

More information on **manda.co**

More information on **fintalent.com**

Pipeline

pipeline

pipelinecrm.com

Pipeline Management | HQ: USA | Founded: 2006

Pipeline CRM is a US sales CRM (formerly PipelineDeals) offering pipeline management, automation and reporting for small and mid-sized teams.

Pipeline CRM (Founded 2006 as PipelineDeals, rebranded 2020, acquired by saas.group in 2022) is a sales CRM for small and mid-sized teams. It provides pipeline and lead management, sales automation, email campaigns and reporting, and can be adapted to track relationship and deal pipelines. It is a general-purpose sales CRM rather than a dedicated M&A platform.

Target users:
SME Owners · M&A Advisory

Pricing:
Start USD 25 / Develop USD 33 / Grow USD 49 per user/month (annual billing); Enterprise custom; 14-day free trial

Key features:
- Visual pipeline management with Kanban views
- Lead and contact management
- Sales automation and workflows
- Email campaigns and AI email assistant
- Tracking, reporting and forecasting
- Data enrichment add-on
- Mobile app with map views
- Integrations with QuickBooks, Mailchimp, Outlook and Google Workspace

What sets it apart:
- Long-established SMB-focused CRM since 2006
- Transparent low per-user pricing
- Simple setup with Kanban-style pipeline views

AI Capabilities:
Built-in AI email assistant that drafts sales and marketing emails, with tiered monthly writing-prompt allowances per plan.

Integrations:
QuickBooks, Mailchimp, Microsoft Outlook, Google Workspace, Apollo, Zapier

More information on **manda.co**

More information on **fintalent.com**

Qmarkets

Qmarkets (Q-Scout)

qmarkets.net

Sourcing | HQ: Israel | Founded: 2008

Q-scout by Qmarkets is an innovation and deal-scouting platform that applies AI to startup databases and helps corporate M&A and venturing teams build intelligent deal-flow pipelines.

Qmarkets is an innovation management software provider; Q-scout extends its platform into external technology scouting and deal-flow management for corporate venture and M&A-adjacent activities.

Target users:
Corporate M&A · Corporate Venturing · Corporate Strategy · Innovation Teams · Corporate Development

Pricing:
Subscription – SaaS licensing for innovation and scouting teams; pricing is tailored by scope and modules

Key features:
- AI-enhanced startup database – Access to an AI-enhanced database of 1M+ startups to discover solutions with transformational potential.
- Intelligent deal-flow – Manage scouting funnel from discovery through evaluation, collaboration and partnership or acquisition.
- Collaboration tools – Engage founders, partners and internal experts to refine opportunities.
- Tracking & reporting – Track opportunities and show tangible results from scouting programs.
- Integration with wider Qmarkets suite – Connects to broader innovation management modules.

What sets it apart:
- Connects innovation and deal sourcing workflows.
- AI support for identifying relevant startups.
- Strong reporting on scouting impact.

AI Capabilities:
Q-scout leverages an AI-enhanced startup database and intelligent deal-flow management to surface and prioritize opportunities in large innovation ecosystems.

Integrations:
Integrates with the broader Qmarkets innovation suite.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

RIA Catalyst

riacatalyst.com

Pre-LOI / Sourcing | HQ: USA | Founded: 2024

RIA Catalyst is an AI-powered M&A intelligence platform purpose-built for RIA acquisitions, providing 15,000+ firm profiles and AI acquisition scoring.

AI-powered M&A intelligence platform purpose-built for RIA acquisitions, providing 15,000+ firm profiles, AI acquisition scoring, and 100+ filters to help acquirers identify and evaluate registered investment advisor targets faster.

Target users:
RIA Acquirers · Aggregators · PE-backed platforms · Strategic Buyers

Pricing:
Subscription

Key features:
- 15,000+ RIA firm profiles with 400,000+ advisor-level data
- AI-powered Acquisition Score (trained on 1,500+ historical RIA deals)
- 100+ customizable filters
- ADV brochure NLP analysis & historical AUM data; Custom API and scoring model (Enterprise)

What sets it apart:
- Only purpose-built platform for RIA M&A target identification - niche vertical focus
- Acquisition Score uses ML trained on 1,500 historical deals across 300+ data points
- Free tier available; transparent public pricing (USD 400–USD 4,000/mo depending on tier)

AI Capabilities:
ML-based Acquisition Score predicts acquisition fit using 300+ data points from 1,500 historical RIA acquisitions; NLP analysis of ADV brochures. Purpose-built for RIA sector.

Integrations:
Custom API (Growth/Enterprise); WealthFeed partnership for contact data enrichment

More information on **manda.co**

More information on **fintalent.com**

Sc0red

sc0red.com

Pre-LOI / Sourcing | HQ: USA | Founded: 2024

Sc0red is an AI-powered M&A target sourcing platform letting deal professionals digitize their investment thesis and apply it at scale across 68M+ companies.

AI-powered M&A target sourcing platform allowing deal professionals to digitize their investment thesis and apply it at scale across 68M+ companies, surfacing acquisition-ready targets with precision scoring and outreach contact data.

Target users:
Corp Dev · PE (Mid-Market) · Investment Banking · M&A Advisors

Pricing:
Subscription

Key features:
- Investment thesis digitization applied across 68M+ indexed companies
- Company & person search with enriched contact data (email, phone)
- Credit-based usage model
- Advisory services layer for mid-market PE
- Patent-pending AI scoring methodology

What sets it apart:
- Hybrid model: SaaS platform + advisory services for mid-market PE - unusual combination
- Transparent, credit-based pricing with publicly listed tiers (USD 500–USD 3,000/mo) - rare in M&A software
- Patent-pending AI scoring methodology trained on acquisition fit signals across 68M+ companies

AI Capabilities:
AI analyzes 68M+ companies against user-defined investment theses; patent-pending scoring methodology for acquisition-readiness and strategic fit identification.

Integrations:
N/A (standalone platform; no specific integrations listed publicly)

More information on **manda.co**

More information on **fintalent.com**

Scend

scend.ai

Pre-LOI / Sourcing | HQ: USA | Founded: 2024

Scend is an agentic financial search platform providing ground-truth intelligence on companies, people, and deals across private markets.

Agentic financial search platform providing ground-truth intelligence on companies, people, and deals in private markets - functioning as an operating system for M&A sourcing, buyer discovery, and market research.

Target users:
PE · Corp Dev · Investment Banking · Family Offices · M&A Advisors

Pricing:
Subscription

Key features:
- Originations: custom datasets for M&A/GTM sourcing
- Buyer & Investor Discovery with curated contact lists
- Market Research & dynamic TAM analysis
- CRM integration
- Real-time agentic search across news, directories, and proprietary data

What sets it apart:
- Finance-tuned agentic search - not a generic AI wrapper on a database
- Serves both buy-side and sell-side in one platform; rare breadth of coverage
- Verified low email bounce rate on outreach targets; actionability-focused data

AI Capabilities:
Agentic search engine tuned for finance workflows; synthesizes news, directories, and proprietary data sources in real time to answer financial questions and surface deal targets.

Integrations:
CRM integration (Salesforce and others); API available

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Tiger Team M&A

Tiger Team M&A

tigerteammna.com

All | HQ: USA | Founded: 2025

Tiger Team M&A builds M&AOP, the AI operating platform for M&A. Corporate development and private equity teams use it to build strategy and optimize outcomes across the M&A lifecycle.

M&AOP agents reason over the M&A Logic Model, an encoded model of how M&A decisions create value across deal types, integration scenarios, and value drivers. Outputs are deal-aware, traceable to the decision that justified them, and governed by customer approval gates and audit trail. Most teams are live within days. For enterprise deployments, forward-deployed solution engineers with Fortune 100 M&A backgrounds are available to configure the platform to the customer operating model and deal process.

Target users:
Corporate Development · Private Equity · Integration Management Offices

Pricing:
Subscription

Key features:
- Deal NorthStar builder for strategic alignment
- Agentic strategy monitoring and risk flagging
- Automated deliverable generation (integration plans, diligence checklists, interim operating policies)
- Portfolio dashboard with live deal KPIs and artefact status
- Scenario simulation to compare integration strategies before committing resources
- Governance layer: approval gates, per-agent autonomy, role-based access, full audit trail

What sets it apart:
- Patent-pending M&A Logic Model, built on decades of Fortune 100 M&A leadership, so agents reason in M&A terms rather than generating generic project plans
- Every artefact traces back to the Deal NorthStar, preventing strategic drift
- Available deployment services include AI-readiness assessment and deal-process redesign, so the platform compounds value against a sound operating model rather than automating broken workflows

AI Capabilities:
AI-native with agentic capabilities: advisory chat grounded in the M&A Logic Model, autonomous strategic-alignment monitoring, deliverable generation calibrated to deal rationale and target profile, and scenario simulation. Customer deal data is never used to train models.

Integrations:
CRMs, VDRs, project management (Monday, Asana), cloud content and document management, M&AOP REST API and MCP server

More information on **manda.co**

More information on **fintalent.com**

Wrike

wrike.com

Due Diligence / Integration | HQ: USA | Founded: 2006

Wrike is a collaborative work management platform serving 20,000+ organizations across 140 countries, offering AI-powered automation and 400+ integrations.

Wrike provides configurable workspaces, custom workflows, and advanced reporting so teams can plan, track, and analyze complex projects in real time across departments and geographies. Its AI layer (Wrike Copilot and Work Intelligence) helps prioritize work, flag risks, and automate routine updates, while native integrations and open APIs connect tools like Salesforce, HubSpot, Slack, Adobe, and Tableau into a single governed environment.

Target users:
Mid-Market and Enterprise Marketing · Operations · Professional Services Teams running Complex Multi-Stakeholder Projects

Pricing:
Subscription

Key features:
- Interactive Gantt charts, kanban boards, and workload views
- AI Agents for workflow automation triggered by status changes and workload routing
- Resource management and capacity planning
- Custom workflows and approval processes
- Advanced reporting with real-time dashboards

What sets it apart:
- AI Agents can chain together autonomously - one agent's output triggers the next - enabling complex multi-step automations
- 400+ prebuilt enterprise connectors including CRM, marketing, HR, and finance tools in a single platform
- Apex tier includes AI-led automation and unlimited whiteboards for enterprise-scale workflows

AI Capabilities:
AI Agents trigger on status changes, read custom fields, route tasks based on workload, chain together for multi-step automation, and respond to API triggers. AI features included in all paid plans.

Integrations:
Salesforce, Slack, Microsoft Teams, Google Workspace, Jira, Adobe Creative Cloud, Zoom, Marketo, Workday, NetSuite, 400+ apps

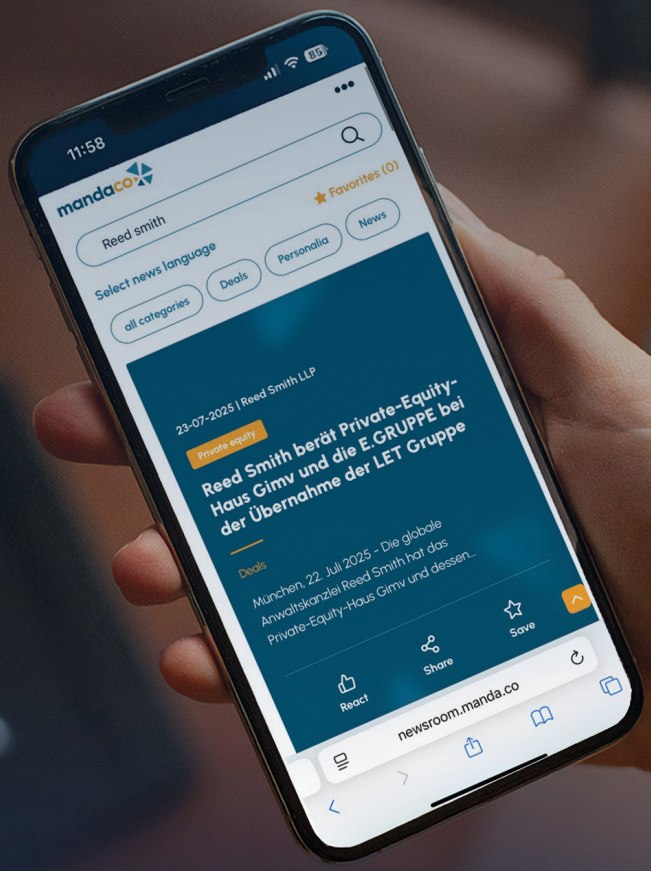
More information on **manda.co**

More information on **fintalent.com**

THE NEXT DEAL IS SURE TO COME

Stay up to date with all the latest M&A news. Whether it's transactions, personnel matters or general information:

In mandaco's M&A Newsroom, you'll find all the latest news straight from the companies involved, advisers and service providers



Read directly at: newsroom.manda.co

mandaco

CHAPTER 4

Virtual Data Rooms & Transaction Security

39 tools

The data room remains the transaction's centre of gravity - and with 39 entries it is the most crowded category in the market. Selection criteria have shifted: security certifications are table stakes; the race is now about AI-assisted Q&A, redaction, document intelligence, and pricing models that don't punish page counts.

In this chapter: VDR · Secure Collaboration · Q&A & Redaction

✓ Verified by vendor

Datasite®

Datasite

datasite.com

All | HQ: USA | Founded: 1968

Datasite is a purpose-built M&A platform that connects private-market intelligence, deal preparation, marketing, secure virtual data rooms, AI-assisted diligence and post-deal archiving to help deal teams manage transactions across the lifecycle.

Datasite supports more than 39,000 transactions annually across 180 countries, and has become one of the most widely used platforms for high-value M&A, including four of the five largest deals by transaction value in 2025. Its portfolio includes Datasite, Grata, Blueflame AI and Sherpany, providing connected capabilities from deal sourcing and preparation through diligence, closing and post-transaction governance.

Target users:
Legal · Corporate M&A · M&A Advisory · Private Equity

Pricing:
Subscription- or project-based pricing is available. Pricing is quote-based and designed to be transparent and all-inclusive. Datasite Prepare is available free for up to 90 days. Contact Datasite for pricing.

Key features:
- Private-market intelligence and deal sourcing through Grata, including verified company, ownership, financial and transaction data to identify and prioritize opportunities.
- Deal preparation and marketing workflows for organizing content, managing buyer outreach, tracking requests and transitioning seamlessly into due diligence.
- Sell-side and buy-side virtual data rooms with granular permissions, integrated Q&A, engagement analytics, AI-assisted workflows, automated AI redaction, document translation and secure archiving.
- Blueflame AI, a purpose-built agentic AI platform for investment professionals, automates complex workflows, connects internal and external data sources, and helps deal teams execute transactions faster with structured, source-cited outputs.
- Sherpany provides board meeting and governance management, enabling leadership teams to securely prepare for meetings, collaborate on decisions and maintain governance before, during and after transactions.
- Enterprise-grade security and global support, including ISO/IEC 42001-certified AI governance and 24/7/365 multilingual assistance from Datasite Assist.

What sets it apart:
- Connected M&A capabilities spanning private-market intelligence, deal preparation, buyer outreach, due diligence, secure archiving and board governance.
- Permission-aware AI with source citations, auditability and ISO/IEC 42001-certified AI governance.
- Enterprise-grade security, global deal expertise and 24/7/365 multilingual support.

AI Capabilities:
Datasite applies AI throughout deal preparation and due diligence, including semantic search, document summarization, AI-assisted folder structures and file naming, redaction of sensitive information, translation, readiness checks, gap and red-flag analysis, and proposed Q&A responses. Datasite MCP also enables supported AI assistants, including Claude, ChatGPT and Microsoft Copilot, to securely interact with live deal content without exporting documents outside the Datasite environment.

Integrations:
Native integrations include Microsoft Outlook through Datasite Pipeline for opportunity and relationship management; Claude, ChatGPT and Microsoft Copilot through Datasite MCP; developer APIs; enterprise authentication including SSO, MFA and Information Rights Management; and a growing ecosystem of technology partners and integrations that extend Datasite's capabilities across the M&A lifecycle.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

ideals.

Ideals VDR

idealsvdr.com

All | HQ: Switzerland | Founded: 2008

Ideals VDR provides a secure data room that combines best-in-class functionality and fortress-like security. It works with organizations across all industries, helping them accelerate M&A, corporate governance, and other high-stakes transactions and workflows.

Ideals is a trusted virtual data room for high-stakes transactions, used by 2M+ professionals globally. It combines award-winning usability and fortress-like security with a client-centric approach. By offering AI-driven efficiency and 10x faster file processing, Ideals helps businesses close deals faster, streamline due diligence and enhance buyer engagement.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Asset Managers · Sell side · Buy side · Fundraising · Life Sciences · Clinical Trials · Clinical Archiving · Real Estate

Pricing:
Usage-based subscription pricing with Core, Premier and Enterprise plans. Pricing is based on data used rather than per-page charges, with one rate across file types and pro-rata pricing for additional storage and deal extensions. Free trial available.

Key features:
- Deal workflows: Advanced Q&A, due diligence checklists, detailed reporting and multi-project management for efficient deal execution.
- Granular access controls: Custom roles, group permissions, 8 granular permission levels, user access expiry and IP restrictions for precise control over document access.
- Secure document handling: Drag-and-drop and multi-source uploads, automatic indexing, dynamic watermarks, PDF conversion and support for 40+ file formats.
- Advanced security: AES-256 encryption, multi-factor authentication, Fence View, detailed audit trails and independently verified security controls.

What sets it apart:
- Clear, predictable pricing: Pay based on data used, not arbitrary page counts, with no hidden fees.
- Unmatched security: Independently verified security, granular access controls, and adherence to global compliance standards.
- Best-in-class experience and support: Intuitive, category-leading usability backed by 24/7/365 global support.

AI Capabilities:
Ideals provides in-built AI-powered document search, AI chat with documents, and AI redaction, alongside a secure MCP connection to ChatGPT, Claude, and Microsoft Copilot and other third-party AI tools. This enables deal teams to use their preferred AI tools securely within the data room for document review, Q&A, project setup and other workflow automation within existing user permissions and audit controls.

Integrations:
ChatGPT, Claude, Microsoft Copilot, Jurimesh, Emma Legal, Lextract, Prudentia Sciences, Rogo(coming soon), Zapier, n8n, Microsoft SharePoint, OneDrive, Google Drive (coming soon), Dropbox (coming soon), Okta, Microsoft Entra ID, Google Workspace, API, MCP.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

NETFILES

netfiles

netfiles.com

Diligence | HQ: Germany | Founded: 2001

netfiles Deal Room is a virtual data room designed for due diligence and transactions. It combines fast, intuitive setup with granular document control, structured Q&A, audited security and predictable pricing for unlimited users.

Founded in 2001, netfiles is one of Europe's pioneering virtual data room providers. More than 500,000 users in over 140 countries have used netfiles to exchange highly confidential information securely. Our high standards are recognized by user feedback rating netfiles with 4.8 on Capterra.

Target users:
Corporate M&A Teams · M&A Advisers · Private Equity and Investment Firms · Law Firms · Real Estate Transaction Teams · Research & Development · Restructuring and Insolvency Professionals

Pricing:
netfiles Deal Room Essential from EUR 490/month, Professional from EUR 790/month and Premium from EUR 1,190/month. Unlimited users, 3-month minimum term and 14-day free trial. Other term options and multi-project solutions are available on request.

Key features:
- Fast deal-room setup – Upload complete folder structures, automatically index documents and invite an unlimited number of participants.
- Structured Q&A – Professional and Premium plans provide secure Q&A workflows and exportable records for efficient transaction management.
- Granular document protection – Apply view-only rights, protected PDF downloads, personalized watermarks, redaction, disclaimers and print/download restrictions.
- Audit-ready oversight – Track user, group, document and folder activity and export complete data room indexes and audit-proof logs.
- Secure file exchange – Send and receive files of up to 48 GB with encryption, password protection and receipt confirmation.

What sets it apart:
- German-owned, developed and hosted in Germany, supporting full data sovereignty and independence from the US CLOUD Act.
- ISO 27001 and ISO 22301 certified, with independently audited BSI C5 and SOC 2 controls.
- Exceptionally easy to use, with direct expert support and predictable unlimited-user pricing.

AI Capabilities:
AI-assisted bulk redaction for documents is in development in line with netfiles' strict security and data-sovereignty standards.

Integrations:
API Access: Native Microsoft Teams integration, SFTP and WebDAV access are available on selected plans.

More information on **manda.co**

More information on **fintalent.com**

ADMINCONTROL
A EURONEXT COMPANY

Admincontrol

admincontrol.com

Diligence | HQ: Norway | Founded: 2005

Admincontrol delivers secure, easy-to-use virtual data rooms and board portals that help decision-makers manage M&A due diligence and corporate governance with confidence.

Founded in 2005 and headquartered in Oslo, Admincontrol has grown into a leading Nordic and European provider of secure collaboration solutions for boards and deal teams. Its virtual data rooms and board portal products are widely used in M&A, fundraising, and corporate governance, with customers valuing its combination of strong security, transparent pricing, and responsive local-language support. Admincontrol has expanded across the Nordics and the UK and continues to focus on confidentiality, usability, and compliance for decision-makers.

Target users:
Corporate M&A · End client (sell side) · M&A Advisory · Private Equity · Boards

Pricing:
Subscription-style flat-fee pricing per data room with unlimited users; Admincontrol promotes transparent, easy-to-understand pricing and invites customers to request quotes online.

Key features:
- Virtual data rooms tailored for M&A due diligence, fundraising, and restructuring with guided setup and advanced Q&A workflows.
- Integrated board portal for secure board communications, meeting preparation, and document distribution.
- Transparent flat-fee pricing per data room with unlimited users and 24/7/365 customer support.
- Strong security posture with ISO 27001 certification, SOC 2 alignment, and data hosted on dedicated servers in the Nordics.
- Intuitive user interface designed to reduce friction for both administrators and external participants.
- Deep presence in the Nordics and Europe, with local language support and high customer renewal rates.

What sets it apart:
- Integrated solution for both board governance and M&A due diligence, reducing vendor sprawl.
- Emphasis on usability, with guided Q&A, intuitive folder structures, and fast setup.
- Rigorous security and compliance posture trusted by corporates, advisors, and PE firms across Europe.

AI Capabilities:
Integrates with Luminance AI to augment document review and analysis in due diligence, enabling AI-assisted contract review, clause identification, and risk spotting on top of Admincontrol's secure VDR.

Integrations:
Integrates with tools like Microsoft 365/Office for document handling and with Luminance AI for contract analysis and document review; supports SSO and standard enterprise identity providers.

More information on **manda.co**

More information on **fintalent.com**

ANSARADA

Ansarada

ansarada.com

Due Diligence | HQ: Australia | Founded: 2005

Ansarada is an AI-first virtual data room and deal management platform that combines advanced security, predictive deal intelligence and workflow automation so M&A, capital markets and infrastructure teams can prepare, market, execute and integrate complex transactions with greater speed and confidence.

Founded in 2005 in Sydney, Ansarada has grown into a global SaaS provider for high-stakes transactions, providing AI-enhanced virtual data rooms and deal management tools used in more than 20,000 M&A, capital raising, and other critical events worldwide. The platform is known for its strong security, intuitive interface, and innovative AI features and it's trusted by more than 948,000 organizations across 170 countries.

Target users:
Corporate M&A · End client (sell side) · M&A Advisory · Private Equity

Pricing:
Transparent subscription plans based on data room size, duration, and features; entry-level data rooms are priced per month with higher tiers for larger storage and advanced AI capabilities.

Key features:
- AI data room – VDR purpose-built for M&A, IPOs, capital raises and due diligence with AI that can predict winning bidders and deal outcomes with up to 97% accuracy.
- AiDA assistant – Generative AI assistant that searches across all documents, answers questions, summarizes content, and surfaces insights from deal materials.
- AI-Sort and automation – AI-Sort automatically indexes and organizes uploaded documents; bulk actions, smart sorting and AI-assisted redaction streamline room setup.
- Security & governance – ISO 27001–certified platform with granular permissions, dynamic watermarking, self-destructing files, audit trails, SSO and MFA.
- Deal workflow & analytics – Q&A workflows, real-time activity tracking and AI analytics on bidder behavior help teams manage the full transaction lifecycle from preparation to post-deal integration.

What sets it apart:
- Early pioneer in virtual data rooms with a strong innovation focus on AI and automation.
- Full transaction management capabilities beyond a pure data room, including reporting and readiness tools.
- Strong security posture and reliability backed by a long track record and global customer base.

AI Capabilities:
Uses AI extensively in the product: AiDA for search, summarization, and Q&A across documents; AI-Sort for automatic index organization; AI-Translate for inline translation; AI-Redact for smart redaction; AI-Smart Q&A for bidder questions; and AI-Predict to forecast bidder behavior and likely winners early in the process. AI-powered bidder behavior prediction, automated bulk document redaction (500+ docs), deal readiness scoring, risk identification, and outcome prediction throughout the deal lifecycle.

Integrations:
Integrates with common productivity and identity tools (e.g., Microsoft 365, SSO/identity providers) and offers APIs and reporting exports to bring deal data into external dashboards and analytics.

More information on **manda.co**

More information on **fintalent.com**

Blackroom

Blackroom

blackroom.cc

Diligence | HQ: France | Founded: 2022

Blackroom is an AI-native data room and deal intelligence platform where assistants, intelligent VDR workflows and bulk AI redaction help M&A teams, corporates and advisors run complex due diligence and transaction processes faster and more securely than with legacy data rooms.

Founded in 2022 by M&A practitioners in France, Blackroom aims to modernize data rooms in a market dominated by legacy providers. It combines strong security and a clean UX with AI automation that removes drudgery from document review, anonymization, and Q&A so analysts and deal leads can focus on high-value work even in slower or more complex deal environments.

Target users:
M&A Advisory · Corporate M&A

Pricing:
Transparent subscription-style pricing with predictive, no per-page fees; Blackroom emphasizes simple, project-based pricing for boutiques and corporate teams and provides quotes on request.

Key features:
- High-security virtual data room with encryption, SOC2, SSO and granular permissions designed for mid-market M&A transactions.
- AI-powered document analysis that summarizes content, detects sensitive clauses, and lets users ask natural-language questions across deal documents.
- Automatic anonymization of personal data to support GDPR-compliant sharing.
- Modern, intuitive interface focused on reducing setup time and admin work by up to 70%.
- Tools for bulk imports, smart indexing, bulk renaming, and real-time analytics on bidder activity.

What sets it apart:
- Focused specifically on mid-market M&A use cases.
- Designed by former deal practitioners who understand analyst workflows.
- Transparent, predictable pricing structure with no per-page surprises.

AI Capabilities:
Uses AI modules to automatically anonymize personal data, analyze and summarize documents, detect sensitive clauses, and power natural-language Q&A across the content of the data room, significantly reducing manual analyst effort.

Integrations:
Integrates with identity and productivity stacks via SSO and standard enterprise connectors; supports exports into common formats for offline analysis.

More information on **manda.co**

More information on **fintalent.com**

Box

box.com

Due Diligence | HQ: USA | Founded: 2005

Box is a cloud content and collaboration platform that enterprises configure as a virtual data room, using secure file sharing, e-signatures, governance and 1,500+ integrations to manage and accelerate M&A and other confidential deal workflows.

Founded in 2005 and headquartered in California, Box is widely used across industries as a secure cloud content management platform. For M&A and PE teams, Box can be configured as a virtual data room, leveraging its security, governance, and collaboration capabilities along with Box AI features to manage due diligence, fundraising, and other confidential processes.

Target users:
Corporate M&A · Private Equity

Pricing:
Subscription-based SaaS with per-user plans (Business, Business Plus, Enterprise) starting from around USD 20–USD 30 per user per month, with VDR-grade features and governance typically available on Enterprise tiers; exact pricing depends on plan, region, and contract.

Key features:
- Granular, seven-level permission model, external collaborator controls, watermarking, compliance features for FINRA, SOX, HIPAA and GDPR, and audit trails suitable for due diligence and deal rooms.
- Virtual data room configuration with features like detailed activity reporting, permissioning, watermarking, and secure external sharing.
- Collaboration tools such as Box Notes and Box Canvas for drafting, brainstorming, and coordinating deal workstreams.
- Workflow automation via Box Relay to handle approvals, comments, and document routing.
- Box AI features (e.g., Box AI for Notes/Documents) that enable users to ask questions of their content, summarize documents, and generate drafts directly within Box.

What sets it apart:
- 1,500+ native integrations including Microsoft 365, Google Workspace, Salesforce, Slack, DocuSign, and Zoom
- Enterprise-grade security with FedRAMP authorization, HIPAA, and GDPR compliance
- Box AI embedded directly in the content layer, with API access for custom AI agent integrations

AI Capabilities:
Box uses AI and ML in content services (e.g., image labeling, transcription, translation) and Box Shield threat detection, which can enhance automated classification, security and search in data rooms and deal workspaces. Box AI Studio allows enterprises to build and deploy custom AI agents on top of Box content.

Integrations:
Salesforce, Zoom, Slack, Microsoft 365/Office 365, Google Workspace, DocuSign, Adobe, ServiceNow, Ipreo Prism and 1,400+ other apps through the Box integration ecosystem.

More information on **manda.co**

More information on **fintalent.com**

BRAINLOOP

Brainloop

brainloop.com

Diligence | HQ: Germany | Founded: 2000

Brainloop DealRoom is a high-security virtual data room focused on protecting sensitive transaction data with strong rights management, encryption and auditing while supporting M&A, due diligence and other confidential processes end-to-end.

Founded in 2000 in Munich and acquired by Diligent in 2018, Brainloop continues to operate as a high-security European virtual data room provider. DealRoom focuses on protecting sensitive transaction data, particularly for clients that prioritize strict data residency and governance requirements, while benefiting from Diligent's broader governance platform.

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
Quote-based enterprise pricing determined by number of projects, users, and storage; Brainloop typically provides tailored proposals and offers free trials for prospective customers.

Key features:
- High-security virtual data room built around German and EU data protection standards, with data stored in ISO 27001-certified data centers in Germany.
- Integrated rights management and two-factor authentication, with all user actions logged in detailed audit trails.
- Web-based access with no client software required, enabling fast onboarding of bidders and advisors.
- Multiple modules in the Brainloop portfolio (DealRoom, BoardRoom, MeetingSuite, CollaborationRoom) that share a security architecture for different governance use cases.
- Trusted by corporates, investors, and public sector clients across Europe for M&A, board communications, and IP-heavy transactions.

What sets it apart:
- Governance-grade security and auditability as a core design principle.
- Proven track record in regulated industries and public sector.
- Built-in Q&A and indexing – Embedded tools accelerate project setup and communication during diligence.

AI Capabilities:
N/A

Integrations:
Integrates with corporate identity and access management systems, and can be combined with Diligent's other governance tools such as board portals and entity management.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Caplinked™

Caplinked

caplinked.com

Due Diligence | HQ: USA | Founded: 2010

CapLinked is an enterprise-grade virtual data room that combines bank-level security and intuitive collaboration to streamline due diligence, fundraising, asset sales and other complex M&A and financing transactions.

Founded in 2010 by former PayPal and private equity executives, CapLinked is headquartered in the Los Angeles area and serves thousands of organizations in more than 100 countries. It positions itself as a modern, cost-effective alternative to legacy data rooms, emphasizing ease of use, strong security and responsive support for M&A, fundraising, real estate and other high-stakes transactions.

Target users:
Corporate M&A · End client (sell side) · M&A Advisory · Private Equity · Venture Capital · Legal Firms

Pricing:
Subscription - Team plan pricing starts around USD 149–USD 399 per month depending on sources and configuration, with an Enterprise plan priced on request for larger, ongoing deal programs.

Key features:
- Secure workspaces for document sharing with buyers, investors, and counterparties in M&A, fundraising, and other transactions.
- Fast bulk uploads and a web-based interface accessible from any device.
- Granular permissions and digital rights management (FileProtect) with watermarking, view-only modes, and expiration controls.
- Audit trails and activity tracking for every document and user.
- API and white-label options to embed secure document workflows into other applications.

What sets it apart:
- Built for dealmakers – Feature set tuned around M&A and capital transactions.
- Value-driven – Competitive pricing and quote-matching against other providers.
- Security + usability – Balances audit-grade security with an interface designed not to slow deals down.

AI Capabilities:
CapLinked markets "intelligent automation" and AI-powered search and document-organization capabilities that help users quickly locate key information and manage large deal document sets more efficiently.

Integrations:
Integrates with existing enterprise environments via SSO, APIs, and connectors; can be embedded into custom workflows and applications.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

clinked.com

Clinked clinked.com/virtual-data-room

Diligence | HQ: UK | Founded: 2008

Clinked provides a white-labelled virtual data room and client portal platform that lets firms run M&A and due diligence securely and then convert closed deal rooms into ongoing client portals for board packs, investor updates and more.

Founded in 2008 in the UK, Clinked serves professional services firms, financial institutions, and agencies needing branded client portals and secure collaboration. For M&A and PE teams, it can be configured as a lightweight virtual data room when dedicated VDR features are not required. Used by over 3,000 high-stakes businesses in 40+ countries for deals, audits and ongoing client collaboration.

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
Subscription – starts at USD 239/month for 100 members; annual billing saves 20%, two-year commitment saves 35%. Per-workspace pricing (flat regardless of users within member limit).

Key features:
- Bank-grade VDR – Secure online data rooms with encryption, granular permissions, audit trails, Filesafe dynamic watermarks and optional private cloud hosting.
- White-label client portals – Custom domains, branding and even branded mobile apps so portals look and feel like the firm's own environment.
- Document controls – Black-boxing of sensitive details, NDA gating, granular view/download/edit rights and 2FA to keep information tightly controlled.
- Q&A & audit export – Structured Q&A, activity tracking and full room export (including Q&A) at close for compliance.
- Client collaboration – Chat, tasks, calendars and project tools to support ongoing client work beyond individual deals.

What sets it apart:
- Brand-aligned experience – Clients see a portal that reflects the firm's identity.
- Versatile – Supports deals, audits and long-term client work in one platform.
- Security & compliance – ISO-aligned controls with detailed audit trails and encryption.

AI Capabilities:
N/A

Integrations:
Native integrations with Google Workspace (Drive, Contacts, Calendar, SSO), Microsoft OneDrive, Adobe Acrobat Sign, DocuSign, Power BI, Jotform, Voiceflow, plus embeddable content via iframes.

More information on **manda.co**

More information on **fintalent.com**

DataRooms

datarooms.com

Diligence | HQ: USA | Founded: 2010

DataRooms.com provides secure virtual data rooms designed for due diligence, corporate information exchange and asset marketing, with an emphasis on intuitive usability and high-touch support for deal teams and corporate users.

DataRooms.com is a Dallas-based VDR provider serving North American clients and global corporations with secure, intuitive data rooms used by investment banks and corporates for M&A, capital raising and governance workflows.

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
Subscription and project-based pricing tailored to storage and user needs; DataRooms.com provides quotes on request.

Key features:
- Project due diligence – VDRs tailored for sell-side and buy-side M&A, fundraising, restructuring and debt transactions.
- Corporate information exchange – Secure collaboration for governance, regulatory reporting, investor relations, joint ventures and IP licensing.
- Asset sales & marketing – Integrated marketing and user registration workflows for real estate investment sales and oil & gas A&D.
- Security & support – Highly protected platforms with intuitive interfaces and high-touch customer support cited as key strengths.

What sets it apart:
- Versatility across M&A, governance and asset sales.
- Recognized as a top-rated VDR in independent reviews.
- Focus on intuitive UX for broad user bases.

AI Capabilities:
N/A

Integrations:
Operates as a standalone cloud platform that can be used alongside email, CRM, and other deal tools.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

dataroom
Ihr sicherer deutscher Datenraum

dataroomX

dataroomX.de

Diligence | HQ: Germany | Founded: 1995

DataroomX is a German-made virtual data room platform that offers highly secure data rooms with flat-rate pricing, strong audit features and special services like notary sealing for due diligence and other high-stakes transactions.

Founded in 1995 in Germany, DataroomX has become a popular domestic VDR provider for German-speaking markets. It emphasizes secure, compliant data rooms with predictable pricing and ease of use rather than complex feature sets.

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
Flat-rate subscription pricing starting from around EUR 190 per month per data room, with higher tiers for more concurrent data rooms.

Key features:
- Virtual data rooms hosted exclusively on high-performance servers in Germany for strict data residency.
- Certified IT security and compliance: hosted in ISO 27001-certified data centres in Germany.
- Transparent flat-rate pricing with unlimited files, page views and data transfer without hidden page or user fees.
- Easy setup with no hardware or software installation needed.
- Used by M&A advisors, law firms, SMEs, public institutions, and courts for due diligence and legal processes.

What sets it apart:
- Appeals to clients prioritizing German data residency and predictable cost.
- Simple to deploy without IT overhead.
- Serves both corporate and public-sector use cases.

AI Capabilities:
A proprietary AI assistant hosted exclusively on servers in Germany is planned for the end of 2026, enabling secure and data-sovereign AI support within the virtual data room.

Integrations:
Provides web-based access and can be used alongside common productivity and legal tools; not deeply integrated but easy to combine with existing workflows.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

DealRoom

DealRoom

dealroom.net

All | HQ: USA | Founded: 2012

DealRoom is the AI-powered M&A Operating System purpose-built for Buyer-Led M&A™, combining virtual data room, due diligence, pipeline management, and post-merger integration in a single tool with transparent pricing that scales with deal volume.

Founded in 2012 in Chicago, DealRoom was built by M&A practitioners to fix fragmented workflows across spreadsheets, email, and separate VDRs. It now offers a unified operating system for sourcing, diligence, integration, and divestitures, with native in-app AI and an MCP to increase deal efficiency and scale

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
Transparent, subscription-based pricing based on deal volume. Unlimited users, no per-document fees. DealRoom provides quotes upon request.

Key features:
- End-to-end lifecycle – Covers sourcing, pipeline, diligence, integration and project management in one unified environment.
- Built-in data room – Secure VDR with document management, permissions, version control and audit trails integrated into workflows.
- Task and Q&A management – Diligence checklists, task assignment, progress tracking and in-system communication with @mentions.
- Reporting & analytics – One-click BI-style reports on pipeline, diligence status and integration milestones.
- Integrations – Connects with tools like Slack, Teams, CRM and project software to create a central hub for M&A data.
- AI Powered - both in-app AI built for M&A and an MCP to connect to your preferred AI (ChatGPT, Claude, Gemini).

What sets it apart:
- Single system spanning the full M&A lifecycle - eliminates tool-switching that fragments workflows
- Flat-rate unlimited user pricing model vs. competitors charging per seat or per page
- AI built into pipeline and due diligence modules eliminates manual work and increases accuracy

AI Capabilities:
AI connects email inboxes and DealRoom to ensure accurate pipeline data and diligence risk flagging so that important details do not slip through the cracks. AI auto-organizes diligence documents and analyzes them for key factors, eliminating hours of manual review. DealRoom MCP connects your source of truth for deal data (DealRoom) with your preferred AI tool(s) (Claude, Copilot, ChatGPT, etc) to scale workflows and improve accuracy.

Integrations:
Integrates with tools such as Outlook, Google Workspace, Slack, Salesforce, Microsoft Teams, Okta, REST API, and can export data to spreadsheets and BI tools.

More information on **manda.co**

More information on **fintalent.com**

DealVDR
by FINSIGHT

DealVDR

dealvdr.com

Diligence | HQ: USA | Founded: 2014

DealVDR is a capital markets-oriented virtual data room that plugs into Finsight's broader platform for roadshows and deal analytics, offering secure document hosting, granular permissions and engagement insights.

Operated by Finsight, DealVDR focuses on the needs of investment banks and corporate issuers, combining a robust VDR with analytics and close integration with other Finsight products like Deal Roadshow and InvestorSet.

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
Subscription and project-based pricing depending on deal volume, storage, and usage; provides quotes on request.

Key features:
- Secure VDR with drag-and-drop uploads, permission controls, watermarking, and audit trails.
- Integrated Q&A module for due diligence.
- Advanced analytics including engagement analytics via Deal Roadshow and cross-deal analytics.
- Fast provisioning of new rooms and seamless staging-to-live transitions.
- One deal manager portal to manage DealVDR, Deal Roadshow, and other Finsight products.

What sets it apart:
- Simplifies management of multiple deals and investor interactions.
- Provides deep engagement analytics beyond standard VDRs.
- Fits naturally into capital markets workflows.

AI Capabilities:
N/A

Integrations:
Integrates natively with other Finsight products such as Deal Roadshow, 17g5, and InvestorSet via the Deal Manager portal.

More information on **manda.co**

More information on **fintalent.com**

DFIN Venue

dfinsolutions.com

Due Diligence / Signing | HQ: USA | Founded: 2016

DFIN Venue is a modernized virtual data room tightly integrated with DFIN's disclosure and regulatory solutions, designed to simplify due diligence, capital raises and IPO preparation with intelligent permissioning and analytics.

DFIN spun out of RR Donnelley in 2016 and is headquartered in Chicago, with Venue as its flagship VDR offering for M&A, capital markets and corporate transactions globally. It is listed on NYSE and continues to migrate clients from legacy Venue to the new platform through 2026.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Law Firms

Pricing:
Project-based and subscription pricing depending on transaction type, storage, and services; DFIN provides quotes on request.

Key features:
- Modern Venue VDR – Rebuilt platform designed for ease of use, large file support and high-capacity storage for complex, data-heavy deals.
- Intelligent permissioning – Fine-grained access controls and templated roles to speed setup and maintain security.
- Real-time insights – Analytics on user activity and document engagement to speed due diligence and collaboration.
- Integration with disclosure tools – Connects to ActiveDisclosure and other DFIN tools to streamline SEC filings, IPO and M&A reporting.

What sets it apart:
- Deep integration between Venue VDR and ActiveDisclosure enables a single platform from due diligence through SEC filing
- Bulk AI redaction automates sensitive document review across large document sets - key differentiator for regulated deals
- Institutional heritage: spun out of R.R. Donnelley (founded 1864), with deep relationships across Wall Street and global law firms.
- with deep relationships across Wall Street and global law firms

AI Capabilities:
AI-powered bulk redaction identifies and removes confidential, sensitive, and PII content across multiple documents simultaneously. Real-time deal analytics and intelligent permissioning leverage automated data processing.

Integrations:
Integrates with DFIN's ActiveDisclosure and related reporting tools; users can link Excel-based financial data into filings using ActiveDisclosure and connect deal data with disclosure workflows.

More information on **manda.co**

More information on **fintalent.com**

Digify

digify.com

Due Diligence | HQ: Singapore | Founded: 2011

Digify is a deal-ready virtual data room and document security platform that combines intuitive UX, persistent post-download protection and granular analytics so M&A, fundraising and investor relations teams can run secure, insight-rich processes without complex software.

Digify is a secure document sharing and virtual data room platform that lets teams protect, track and control sensitive documents before and after download, with intuitive deal-focused workflows and audit-grade analytics, serving 350,000+ customers in 138 countries.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital

Pricing:
Subscription pricing starting from around USD 120 per month based on storage, projects, and features.

Key features:
- Secure VDR – Deal-focused data rooms with granular user/file/folder permissions, dynamic watermarking, Q&A, audit logs and detailed activity tracking.
- Persistent Protection After Download (PPAD) – Patent-pending DRM that keeps admins in control even after recipients download entire data rooms, including revocation, expiry, print/forward blocks and full open history.
- Document analytics – Page-by-page viewer insights to see who viewed which sections, for how long, and from where, supporting targeted follow-up and prioritization.
- Integrations – Edit in Office 365, sync from Box/Drive/Dropbox/OneDrive, protect attachments in Gmail/Outlook, track via Salesforce/HubSpot and connect 8,000+ apps via Zapier and API.
- Compliance & security – ISO 27001 certified, AES-256/RSA-2048 encryption, GDPR and HIPAA compliant, regional data residency choices, SSO and robust permission APIs.

What sets it apart:
- Centralizes sensitive documents from multiple sources.
- Dual focus on DRM and VDR in one platform, document security features go beyond typical VDRs
- Reduces risk with granular access control and watermarking.

AI Capabilities:
N/A

Integrations:
Box, Google Drive, Dropbox, OneDrive, Office 365, Gmail, Outlook, Salesforce, HubSpot, Zapier and 8,000+ apps via API.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Dropbox DocSend

DocSend

docsend.com

Diligence | HQ: USA | Founded: 2013

DocSend is a document analytics and virtual data room platform that turns every investor or buyer click into actionable data, while keeping sensitive deal documents tightly controlled.

Acquired by Dropbox, DocSend now operates as part of the Dropbox ecosystem, focusing on secure document sharing, investor updates, and deal data rooms. DocSend has a new Diligence Tracker feature which centralizes documents, stakeholders, and tasks to mitigate risk and keep work moving.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital

Pricing:
Subscription pricing with tiers for individuals, teams, and advanced data rooms; pricing depends on feature set and seats.

Key features:
- Secure data rooms and link-based sharing with granular access controls and viewer analytics.
- Branded spaces with logos, banners, and custom domains.
- Advanced permission management including email/domain restrictions and passcodes.
- Integrations with Dropbox, Gmail, Outlook, and Salesforce for streamlined workflows.
- E-signature and NDA workflows via Dropbox Sign integrations.

What sets it apart:
- Gives deal teams detailed insight into investor and buyer engagement.
- Simplifies secure sharing without forcing recipients to create accounts.
- Connects VDR activity to CRM systems through Salesforce integration.

AI Capabilities:
DocSend's AI Organize is an AI-powered feature for Advanced Data Rooms that helps admins quickly build and maintain a well-structured virtual data room. Rather than manually creating folder hierarchies and dragging files into place, AI analyzes your documents and proposes an organization that you review before applying.

Integrations:
Dropbox; Gmail; Outlook; Salesforce; Slack and other tools via integrations and APIs.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

drooms

Drooms

drooms.com

Due Diligence | HQ: Germany | Founded: 2001

Drooms is the leading European data room platform for due diligence and transactions, combining data security with AI-powered analysis and collaborative workflows across M&A, commercial real estate and other complex transactions. Built on 25+ years of experience, European sovereignty and in-house AI, it gives dealmakers the transparency, speed and control to move complex transactions forward with speed and confidence.

Founded in 2001, Drooms pioneered virtual data rooms for European M&A and real estate transactions. Today, the company has evolved into a platform that supports the whole transaction lifecycle, from preparation to closing. Its latest platform-level product, Drooms Intelligence, enables teams to query the entire data room in natural language, receive traceable, source-linked answers and structure information for use beyond individual transactions.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Real Estate

Pricing:
Subscription and project-based pricing, with plans based on users, storage and feature bundles.

Key features:
- Drooms Hub – Secure data rooms for complex transactions, with granular permissions and 24/7 support bundled in one subscription.
- AI-powered workflows – Integrated features for document organisation, redaction, translation and analysis.
- Drooms Intelligence – Platform-level AI-product for querying, analysing and reporting information across the entire data room.
- Certified Archive – Secure long-term storage for closed transactions with fast search and retrieval, available in digital and physical (USB) formats.
- Lifecycle coverage – Supports the use of transaction and asset information beyond the individual deal, including portfolio, reporting and compliance workflows.

What sets it apart:
- 100% European-owned and operated, with the platform and AI developed in-house
- Drooms Intelligence makes the entire data room directly queryable, turning document-heavy workflows into traceable, decision-ready intelligence
- Confidential data stays within Drooms' secure environment, supporting regulated European dealmaking.

AI Capabilities:
Drooms uses in-house AI across its platform for document organisation, translation, redaction and analysis. Drooms Intelligence extends this across the full data room: the AI Assistant enables conversational analysis with source-linked answers across documents, clauses, figures and tables. Tabular Review automatically extracts and structures recurring information from lease agreements and energy performance certificates for portfolio, reporting and compliance workflows. All AI processing remains within the Drooms platform, so confidential documents do not need to be transferred to external AI services.

More information on **manda.co**

More information on **fintalent.com**

REVVER
formerly eFileCabinet

Revver

revverdocs.com

Due Diligence | HQ: USA | Founded: 2001

Revver is a cloud document management and workflow automation platform (rebranded from eFileCabinet in 2023) that helps SMB and mid-market teams capture, organize, secure, and automate document-dependent work, using structured repositories, no-code workflows, and AI-powered data extraction to turn file storage into governed, repeatable processes.

Revver is the modern evolution of eFileCabinet's Rubex product: in April 2023 the company adopted the Revver name and refreshed its platform to focus on automation and "putting documents to work" rather than just storing them. The product now combines traditional DMS capabilities with intelligent document processing, Smart Extract AI, and workflow automation, aiming to help knowledge-work teams reduce manual filing and approvals, improve compliance, and free capacity for higher-value work across a wide range of industries.

Target users:
Accounting & Finance teams · Operations & Back-office Teams · HR Teams · Legal & Compliance Teams

Pricing:
Subscription – quote-based SaaS pricing sold via Revver's sales team.

Key features:

- Centralized, permissioned document repository with folder templates, version control, audit trails, and full-text OCR search for fast retrieval.
- No-code workflow automation to route documents through tasks, reviews, and approvals, with governance, retention, and role-based access controls built in.
- Smart Extract AI and intelligent document processing to read scans and handwritten forms, extract key metadata, auto-file content, and trigger downstream actions.
- Embedded eSignature, secure client portals, and encrypted file sharing for compliant collaboration with clients, partners, and internal stakeholders.
- Cloud/SaaS deployment with desktop and mobile apps, SSO/LDAP support, and certifications such as SOC 2 and ISO 27001 to meet regulated-industry requirements.

What sets it apart:

- Long-standing, purpose-built platform for regulated, document-heavy SMB and mid-market organizations, with experience evolving from simple storage into automated document workflows.
- Combines enterprise-grade security and compliance tooling (encryption, audit trails, retention, certifications) with no-code workflow and Smart Extract AI to automate up to most routine document processes.
- Offers a single hub for document repositories, approvals, signatures, and client portals, reducing the need for multiple point tools and making it easier to standardize processes across teams and locations

AI Capabilities:
Revver uses Smart Extract AI and related intelligent document processing to automatically read and classify incoming documents, extract metadata, and drive filing, routing, and approvals without manual data entry, while OCR and handwriting recognition make even scans and forms fully searchable and reportable.

Integrations:
Revver integrates with Microsoft 365/Office, Google Workspace, Salesforce, DocuSign, QuickBooks, and common ERP/line-of-business systems such as SAP, Microsoft Dynamics, Workday, and NetSuite, alongside a published REST API for custom connections.

More information on **manda.co**

More information on **fintalent.com**

Epiq VDR

epiqglobal.com

Diligence | HQ: USA | Founded: 1988

Epiq delivers a restructuring-grade virtual data room tightly integrated with its broader Chapter 11 services, enabling secure, multi-party access to privileged bankruptcy data with robust compliance and auditability.

Epiq's VDR is part of its broader legal and restructuring services portfolio, designed to handle the scale and sensitivity of court-supervised transactions. Epiq is a global provider of technology-enabled legal services and restructuring solutions, offering VDR capabilities alongside claims administration, noticing, reporting and analytics for complex Chapter 11 cases. The VDR is positioned as a secure, no-download environment that shortens timelines via integrated search, multilingual support and a streamlined Q&A module.

Target users:
Corporate M&A · M&A Advisory

Pricing:
Project-based pricing tailored to each restructuring or transaction.

Key features:
- Single, high-security environment for organizing Chapter 11 and other restructuring materials.
- Google-powered search across large volumes of privileged data.
- Streamlined Q&A for multiple parties to review and inquire simultaneously.
- On-demand reports with detailed user behavior analytics.
- HIPAA- and 21 CFR Part 11-compliant infrastructure.

What sets it apart:
- Handles large, complex restructuring data sets.
- Offers robust analytics and reporting.
- Integrates naturally with Epiq's other legal support services.

AI Capabilities:
N/A

Integrations:
Primarily integrated into Epiq's own legal and restructuring workflows; used alongside clients' existing systems rather than via widely marketed native integrations.

More information on **manda.co**

More information on **fintalent.com**

EthosData®
Virtual Data Room Services

EthosData
(part of Ideals VDR)

ethosdata.com

Diligence | HQ: UK | Founded: 2007

EthosData (now part of Ideals) is a UK-based virtual data room provider used for M&A, IPOs, asset sales, and fund-raising, offering dedicated data room managers and AI-powered tools.

Founded in 2007, EthosData focuses on fast setup, human support, and enterprise-level security, now adding AI tools in its more advanced plans. EthosData has supported more than 2,000 transactions and 100,000+ users globally, and is now part of the Ideals VDR group while retaining its brand and product positioning for secure collaboration. It targets M&A, due diligence, compliance and legal teams who need a straightforward yet robust VDR with strong support.

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
Subscription – Basic plan starts at USD 199/month. Professional and Enterprise plans available on request. Free version available on request for trials.

Key features:
- Secure VDR platform – Role-based permissions, user groups and detailed activity tracking for high-stakes document sharing.
- Audit trails – Full audit logs of document access and user actions to support compliance and defensibility.
- Search and indexing – Fast search and structured foldering for large document sets.
- Q&A & collaboration – Built-in Q&A and collaboration tools to keep all stakeholder communication within the data room.
- 24/7/365 support – Multilingual support via phone, email and chat across time zones.

What sets it apart:
- Long track record across thousands of deals.
- Clear focus on usability plus governance.
- Global, always-on support model.

AI Capabilities:
Higher-tier plans include AI-powered tools such as AI-assisted redaction and workflow features.

Integrations:
API integration options on top-tier plans; otherwise used alongside firms' existing systems.

More information on **manda.co**

More information on **fintalent.com**

FIRMEX

Firmex

firmex.com

Due Diligence | HQ: Canada | Founded: 2006

Firmex is a trusted, feature-rich VDR for M&A and other sensitive transactions, offering robust security, redaction, Q&A and flexible subscription models aimed at mid-market M&A, litigation and compliance use cases.

Firmex is a widely used virtual data room solution designed for mid-market M&A, litigation and compliance, focused on ease of use, certified security and responsive 24/7 support.

Target users:
Corporate M&A · End client (sell side) · M&A Advisory · Private Equity · Venture Capital

Pricing:
Single-use and multi-use subscription options with pricing on request.

Key features:
- Diligence-focused VDR – Designed to support M&A due diligence, litigation and compliance workflows with robust security and audit trails.
- Redaction & Q&A – In-room redaction, Q&A tools and project templates to streamline buyer questions and risk management.
- "View As" & SSO – View-as-user perspective and SSO integration to validate and control user access.
- Unlimited projects – Subscription model with unlimited self-serve projects for frequent users.
- Certified security – ISO 27001:2022, HIPAA, SOC 2 and strong encryption with global data centres and data residency options.

What sets it apart:
- Supports large volumes of deals and users, feature set tuned for diligence and compliance.
- Nearly 20 years of brand recognition in the mid-market M&A space with 250,000+ active users
- Provides confidence through robust security and support.

AI Capabilities:
N/A

Integrations:
Integrates with customers' SSO and identity providers; APIs for custom integrations.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

FirmRoom

FirmRoom

firmroom.com

Diligence | HQ: USA | Founded: 2018

FirmRoom is a cloud-based virtual data room from the makers of DealRoom and M&A Science, designed for secure, intuitive M&A due diligence and document sharing, helping dealmakers set up rooms in minutes, collaborate securely and close deals faster without legacy VDR pricing.

FirmRoom is positioned as an easy-to-use, modern VDR that integrates into teams' existing collaboration environments, claiming average savings of more than 80% versus legacy per-page providers and faster diligence cycles for users across fundraising, M&A and audits.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Capital Raise

Pricing:
Subscription – 2 GB (~20K pages) USD 395/month; 5 GB (~50K pages) USD 695/month (Popular); 10 GB (~100K pages) USD 995/month. All plans: unlimited users, 1 data room, watermarking, granular permissions, NDA workflow, redaction, audit trail & analytics.

Key features:
- Simple, modern interface focused on speed and usability.
- Built-in document viewer, granular permissions, custom watermarks and activity analytics for investor tracking.
- Security – AES-256 encryption, SOC 2 hosting on AWS and 2FA for strong protection.
- Fast setup and responsive support, can be launched in under 5 minutes with drag-and-drop uploads and intuitive UI.

What sets it apart:
- Simple, self-service setup with no professional services required for onboarding.
- Part of the DealRoom ecosystem, allowing seamless transition between VDR and M&A project management.
- Supports secure, trackable collaboration.

AI Capabilities:
N/A

Integrations:
N/A

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

fordata

FORDATA

fordatagroup.com

Due Diligence | HQ: Poland | Founded: 2009

FORDATA is an EU-compliant virtual data room for M&A, fundraising, due diligence and audits - supporting complex European transactions since 2009, with technical support delivered in-house around the clock.

FORDATA is a European virtual data room provider focused on secure document sharing for M&A, due diligence, audits and investment projects, with strong emphasis on security, EU compliance and concierge-level support, supporting 1,700+ closed transactions across M&A, private equity, real estate, and corporate transactions.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · Law Firms · End client (sell side) · End client (buy side)

Pricing:
Subscription - per-project pricing for complex deals, quoted on document volume and feature scope, with unlimited users included. VDR Lite self-service subscription from EUR 275/month for 1 GB and 15 users, with extra storage and extra users available to add, and a 20% discount on annual plans; available to buy online. Long-term and framework agreements for teams running deals continuously. Free 14-day trial, no credit card required.

Key features:
- Purpose-built for deals – Advanced VDR dedicated to M&A, fundraising, due diligence and audits, with granular permissions per user, group, file and folder, activity reports, auto-indexing and tools to redact sensitive information.
- Security controls – Read-only mode, blocking of copying, downloading, printing and screenshots, dynamic watermarks as standard and 256-bit encryption to protect documents and IP.
- Q&A module – Structured investor Q&A with several workflows, full confidentiality of communication and a complete audit trail.
- 24/7 support – In-house technical support and transaction services such as document organizing, upload, VDR administration on your behalf and archive preparation with data compliance certificates.
- EU compliance – GDPR, DORA, NIS2, MiFID and MAR compliance, with data centers and processing kept within the EU/EEA.
- Multi-language UI – Interface available in 7 languages: English, Polish, German, Czech, Romanian, French and Spanish.

What sets it apart:
- 15-second average pick-up time on support calls and emails answered within 15 minutes - from our own team, never an outsourced desk
- GDPR-native infrastructure in EU-based data centers with all processing inside the EEA; ISO 27001, DORA and NIS2 compliant
- AI Redaction increases redaction precision by 80% vs. manual review across 25 file formats, including Excel

AI Capabilities:
AI Redaction Tool automates detection and anonymization of sensitive data across 25 formats, including PDF, DOCX, XLSX and PPT, increasing precision by 80%. AI Translation provides instant document translation into 59 languages.

Integrations:
No installation on any device - browser-based on Windows, macOS, iOS and Android. Native in-browser preview for PDF and Microsoft Office files (Word, Excel, PowerPoint), with built-in OCR. 30+ file formats supported. Folder structure import from XLS. SSO/SAML integration available depending on plan and configuration.

More information on **manda.co**

More information on **fintalent.com**

Google Drive

drive.google.com

Due Diligence | HQ: USA | Founded: 2012

Google Drive is Google's cloud storage and file-sharing platform for securely storing, syncing, and collaborating on documents, spreadsheets, and other files from any device.

It integrates natively with Google Docs, Sheets, Slides, and Gmail, enabling real-time co-editing, commenting, and version history across individuals and teams. Drive scales from personal use to enterprise deployments with shared drives, granular permissions, data loss prevention, and admin controls for governance and compliance.

Target users:
Individuals · Small Businesses · Enterprise Teams · Cross-functional Project and Operations Teams

Pricing:
Free / Subscription

Key features:
- Cloud storage with real-time file sync
- Native integration with Google Workspace (Docs, Sheets, Slides, Forms)
- Support for 100+ file formats
- Gemini AI search, summarization, and writing assistance
- Shared drives and granular permission controls

What sets it apart:
- Deepest integration with Google Workspace - Docs, Sheets, Slides, Meet, and Gmail operate natively inside Drive
- Gemini AI embedded for intelligent search, document summarization, and writing assistance across all files
- Most widely adopted cloud storage platform globally - nearly universal user familiarity reduces onboarding friction

AI Capabilities:
Gemini AI embedded for document summarization, writing assistance (Docs), data analysis suggestions (Sheets), AI-powered natural language search, and text recognition in PDFs and images.

Integrations:
Microsoft Office, Slack, Salesforce, Zapier, DocuSign, and 5,000+ apps via the Google Workspace Marketplace

More information on **manda.co**

More information on **fintalent.com**

Thomson Reuters™

HighQ

(Thomson Reuters legal platform)

legal.thomsonreuters.com

Due Diligence / Signing | HQ: UK | Founded: 2001

HighQ is an intelligent work and client engagement platform used by law firms and deal teams for secure collaboration, document review, and transaction workflows. Owned by Thomson Reuters since 2019, it serves 21 of the top 25 UK law firms and 400+ clients globally with document automation, deal rooms, and AI-powered legal operations.

HighQ was founded in London in 2001 as a SaaS collaboration provider and has become a widely used secure file sharing and collaboration platform for law firms, corporates and financial institutions, later acquired by Thomson Reuters. HighQ is broader than a VDR, but it fits M&A workflows where legal teams need structured collaboration and document analysis.

Target users:
Corporate M&A · M&A Advisory · Legal · Private Equity

Pricing:
Subscription – Licensed as part of Thomson Reuters' legal technology portfolio with pricing negotiated by firm size, modules and deployment.

Key features:
- Virtual data rooms – Off-the-shelf VDRs with granular permissions, detailed audit trails and secure sharing for property and corporate deals.
- Collaboration workspaces – Matter and project sites for document management, tasks and communication.
- Integration with legal systems – Connects with matter management and other legal platforms to streamline workflows.
- Reporting & dashboards – Visibility into activity across workspaces and data rooms for partners and clients.

What sets it apart:
- Native integration with Thomson Reuters CoCounsel AI, Practical Law, and Legal Tracker - creating a closed-loop legal operations platform
- Deep penetration in top-tier global law firms (80% of UK Top 100, 50%+ of Global 10
- Highly configurable legal workflow templates covering M&A, litigation, compliance, and contract lifecycle

AI Capabilities:
AI helps streamline legal business management, automate workflows, and analyze documents/contracts. CoCounsel AI (Thomson Reuters' AI) is natively embedded for document review, key clause extraction, content summarization, and AI-assisted Q&A within HighQ workspaces. HighQ MCP server enables AI agents to access client context.

Integrations:
Thomson Reuters ecosystem integrations and enterprise workflow connectivity (Microsoft Office, Google Workspace, Contract Express, Legal Tracker, CoCounsel AI (Thomson Reuters), API/MCP server)

More information on **manda.co**

More information on **fintalent.com**

idgard

idgard.com

Diligence | HQ: Germany | Founded: 2009

idgard is a privacy-first German secure collaboration and VDR platform with sealed cloud architecture. idgard delivers sealed-cloud virtual data rooms and collaboration tools that keep sensitive M&A, board and regulated-industry data securely stored and exchanged within German data centres, with strong compliance credentials.

idgard is a brand of uniscon GmbH, a TÜV SÜD company founded in 2009 in Munich and positioned as one of Europe's leading secure cloud providers, now integrated into the DriveLock HYPERSECURE platform. idgard emphasizes that even the provider cannot access customer data because of its sealed cloud model.

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
Subscription – SaaS licensing for sealed file sharing, data rooms and central drive, with pricing tailored to organisation size and regulatory requirements.

Key features:
- Sealed Cloud technology – Patented architecture that prevents even the provider from accessing customer data, ensuring maximum confidentiality.
- Virtual data rooms ("boxes") – Encrypted project and transaction rooms for M&A, board communications and confidential records.
- Central Company Drive – Enterprise file service letting admins centrally control storage locations, permissions and access rules.
- Compliance coverage – Designed to help clients meet NIS-2, KRITIS, DORA, GDPR and professional secrecy obligations.
- Multi-channel access – Browser, desktop drive, mobile apps and plug-ins for Outlook and Microsoft Teams.

What sets it apart:
- Patented Sealed Cloud prevents metadata and content access even by the provider - goes beyond end-to-end encryption
- German-engineered and hosted - all data processed and stored in Germany, ideal for European regulated industries
- Acquired by DriveLock in 2025, deepening cybersecurity integration for enterprise endpoint + data protection

AI Capabilities:
N/A

Integrations:
API integrations on Enterprise plan, standard SSO and authentication integrations. Microsoft Teams; Active Directory; OpenLDAP; Outlook; standard secure file-sharing workflows.

More information on **manda.co**

More information on **fintalent.com**

imprima
AI DUE DILIGENCE

Imprima

imprima.com

Diligence | HQ: UK | Founded: 2001

Imprima is an AI-enabled virtual data room and due diligence hub that helps legal, M&A and real estate teams prepare, review and close complex cross-border transactions faster and with more confidence.

Imprima has been involved in virtual data rooms since launching Europe's first VDR (Imprima iRooms) in 2001 and has continued to evolve towards AI-powered due diligence and lifecycle support for M&A and real estate.

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
Subscription – project-based and enterprise VDR pricing based on data volumes and services; positioned as a premium, AI-enhanced VDR with pricing shared via sales.

Key features:
- Smart VDR – Transaction-grade VDR with granular permissions, reporting and high-performance document handling for large deals.
- VDR-native AI – Integrated AI tools for data room preparation, vendor and buy-side due diligence, contract review and post-merger integration.
- AI redaction & review – Automated redaction and clause extraction to reduce manual review time.
- Real estate & NPL focus – Strong capabilities for real estate, non-performing loans and other asset-intensive transactions.
- 24/7 multilingual support – Local language support and services for global projects.

What sets it apart:
- Only AI-powered platform covering the entire M&A lifecycle - from data room prep through post-merger integration
- One of Europe's earliest and longest-running VDR providers with 20+ years of dedicated M&A experience and offices in 10 global cities
- AI built natively into the deal workflow (Smart Index, Smart Summaries, Smart Q&A) rather than bolted on

AI Capabilities:
Imprima offers a suite of LLM-driven AI tools integrated into the data room: automatic redaction, summarization, document review, and PII detection for GDPR compliance. AI built directly into core VDR (not bolted on via external tools).

Integrations:
Browser-based access and exports; integrations focus on workflows within the platform.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

SS&C Intralinks

intralinks.com

All | HQ: USA | Founded: 1996

SS&C Intralinks is an enterprise-grade virtual data room and deal management platform that supports the full transaction life cycle through secure document collaboration and AI-assisted deal workflows.

SS&C Intralinks pioneered the VDR category in the late 1990s and now supports more than 10,000 M&A deals annually, handling over USD 35 trillion in financial transactions and serving 6.6M+ registered users worldwide. Intralinks has expanded its AI capabilities through DealCentre AI, helping make every phase of the M&A deal-making process - from ideation through closing - smarter and faster for deal teams.

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
On request.

Key features:
- DealCentre AI – Feature-rich platform for deal preparation, marketing, diligence, closing, archiving, management and post-merger integration.
- AI-powered Q&A – Simplified workflows and access controls, including bulk question imports, question aggregation and suggested responses to streamline and accelerate buyer Q&A.
- AI-powered workflows – AI-assisted tools and pre-configured workflows that generate document summaries, pinpoint critical data, answer specific questions and highlight key metrics.
- AI redaction – AI-powered PII and document redaction to reduce manual work and risk.
- Security and certifications – A multilayered global security and compliance ecosystem; industry's first VDR provider to earn ISO 27701 certification; and advanced IRM that can revoke document access even after download.

What sets it apart:
- Pioneer of the VDR category (Founded in 1996), with deep institutional trust among bulge-bracket banks, corporate organizations and top law firms.
- AI-powered workflows that accelerate critical processes, surface deeper insights and enable smarter decision-making across every deal phase.
- Industry-leading data security and best-in-class service and support.

AI Capabilities:
Intralinks applies purpose-built AI to strategic financial transactions. Link, the proprietary Intralinks AI engine, is trained on deal-specific workflows and embedded throughout the deal life cycle. From categorizing and summarizing documents to identifying and redacting sensitive information and simplifying Q&A, Link streamlines traditional manual deal workflows. Ask Link provides conversational capabilities, searching documents based on prompts to surface the exact data teams need. DealCentre Connect goes further, enabling deal teams to use external AI tools without compromising security, control or compliance. Parent company SS&C continues to invest in AI capabilities across the platform.

Integrations:
Integrates with deal teams' workflows through enterprise infrastructure, enterprise SSO, MCP, APIs

More information on **manda.co**

More information on **fintalent.com**

Kamzan

kamzan.com

Due Diligence | HQ: Italy | Founded: 2015

Kamzan is an Italian secure file sharing and collaboration platform built for structured collaboration within an EU-hosted perimeter.

Kamzan is an integrated, Italy-designed business cloud that brings document management, client records, email, calendars, e-signatures, meetings, project time tracking, and other workplace processes together under one secure login.

Its ecosystem is built for European organizations that need GDPR-oriented data handling, encrypted storage on European servers, private AI capabilities, and specialized tools such as a virtual data room, structured document collection, and compliance management.

Target users:
Accounting Firms · Law Firms · Consulting Firms · Small and Mid-Sized Professional Services Firms · Client-Facing Teams

Pricing:
Subscription

Key features:
- Secure file sharing with 256-bit AES encryption (unique key per client)
- Real-time co-editing of Word, Excel, and PowerPoint
- Integrated calendar and online meeting rooms (SRTP-secured)
- Four user types and unlimited groups
- Two-factor authentication (TOTP)

What sets it apart:
- All data stored exclusively in the European Union - key for EU-regulated industries (GDPR compliance by design)
- White-label branding capability: clients interact within the company's own visual identity
- Integrated video meeting rooms built directly into the platform alongside file sharing and calendar

AI Capabilities:
N/A

Integrations:
Microsoft Office (real-time co-edit for Word, Excel, PowerPoint), TOTP-compatible authenticators

More information on **manda.co**

More information on **fintalent.com**

Multipartner

multipartner.com

Diligence | HQ: Italy | Founded: 2002

Multipartner is a certified international virtual data room provider with Italian data centres, strong ENIGMA encryption and customizable modules for secure, all-inclusive M&A and corporate transactions.

Multipartner is an Italian virtual data room provider offering customizable, highly secure VDRs with ISO-certified Italian data centres, strong encryption and an all-inclusive pricing model for transactions and sensitive projects.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Asset Managers · End client (sell side) · End client (buy side) · Law Firms

Pricing:
Subscription – "All inclusive" VDR pricing with scalable tiers based on space and time, designed to avoid surprise charges; quotes and options are provided via direct sales rather than public tariffs.

Key features:
- Certified Italian VDR – ISO/IEC 27001-17-18 certified data centres in Italy connected via private fibre for disaster recovery and business continuity.
- ENIGMA crypto layer – Strong cryptographic layer applied to all files, going beyond traditional end-to-end encryption for maximum confidentiality.
- Granular roles & permissions – Manager and viewer roles with fine-grained access, editing and download rights per user or group.
- Full traceability – Comprehensive audit trails, integrity controls and extensive data segregation possibilities.
- Modular platform – User-friendly, modular VDR with activatable modules and role profiles tailored to client needs.

What sets it apart:
- Strong, Italy-based security and compliance posture.
- Extra ENIGMA crypto layer for highly sensitive use cases.
- Modular, customizable platform and roles for different projects.

AI Capabilities:
N/A

Integrations:
Browser-based VDR; focus is on secure hosting and encryption rather than named third-party SaaS integrations.

More information on **manda.co**

More information on **fintalent.com**

Onehub

onehub.com

Diligence | HQ: USA | Founded: 2007

Onehub is a secure virtual data room and client portal solution that lets businesses collaborate with colleagues and customers, sharing even their most private data with precise permissions and straightforward pricing.

Onehub markets itself as an SMB-friendly alternative to heavyweight VDRs, trusted by more than 1 million users at brands like Starbucks, Dell and Philips for secure file sharing, client portals and deal data rooms.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · End client (sell side) · End client (buy side) · Law Firms

Pricing:
Subscription tiers: Standard USD 15/user/month (annual USD 12.50), 200 users, 1TB; Advanced USD 25/user/month (annual USD 20), 1,000 users, unlimited storage; Data Room Edition USD 300/month (annual billing), 1,000 users, unlimited storage + watermarking; Unlimited Edition USD 500/month (annual).

Key features:
- Data Room mode – Converts client portals or workspaces into full-featured data rooms with stealth mode, automatic indexing, NDAs and audit trails.
- Easy uploading – Drag-and-drop uploads for large batches of files via browser.
- Advanced activity tracking – Detailed logs of who did what and when inside the data room.
- High-quality previews – Browser and mobile previews for 30+ file types.
- Precise permissions – Granular control over file, folder and link-level access, plus secure sharing with 256-bit encryption.
- Branded workspaces – Custom logo and colours for client-facing rooms.

What sets it apart:
- Combines VDR, client portal, and team file sharing in a single affordable platform - no enterprise minimums
- White-label branding for client-facing workspaces, ideal for professional services firms
- 14-day free trial with no credit card required; transparent tiered pricing from USD 12.50/user/month

AI Capabilities:
N/A

Integrations:
Google Drive, Dropbox, Box, OneDrive (via import), Zapier; Integrates via web and storage APIs; public materials highlight in-platform features.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Progress ShareFile

Progress Sharefile

sharefile.com

Diligence | HQ: USA | Founded: 1981

Progress ShareFile Virtual Data Room is a secure file sharing and virtual data room platform for M&A due diligence, fund-raising, audits, litigation, and other confidential business processes, with granular permissions, dynamic watermarking, real-time audit trails, and built-in Folder Q&A workflows.

Progress ShareFile Virtual Data Room is used by startups, SMBs, and enterprise organizations to manage due diligence and other sensitive document workflows. It combines secure file sharing with virtual data room capabilities such as Folder Q&A, check-in/check-out, granular permissions, and activity reporting, making it a popular alternative to traditional enterprise virtual data room solutions for many organizations.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · SMBs · Startups

Pricing:
Per-user subscription. VDR plan: USD 67.50–75.00 per user per month, minimum 5 users (effective floor ~USD 337–375/month). Annual subscription discounts may be available. Unlimited client (external) users at no additional cost.

Key features:
- Granular security controls – User-, group-, and folder-level permissions with encryption in transit and at rest help protect confidential information.
- Easy deployment & collaboration – Intuitive upload, organization, and secure sharing workflows simplify collaboration with internal and external stakeholders.
- Automatic, customizable watermarks on viewed and downloaded documents help deter unauthorized sharing and improve traceability.
- Folder Q&A – Centralized Q&A workflows streamline buyer, investor, or auditor questions and responses during due diligence.
- Activity alerts & full-text search – Notifications for document activity and full-text search help teams monitor engagement and quickly find information.
- Compliance & security – HIPAA-enabled configurations and SOC-certified security controls support organizations with regulatory and governance requirements.

What sets it apart:
- Suitable for startups and SMBs as well as larger organizations.
- Flexible enough to support fundraising, audits, and M&A.
- Desktop sync and simple sharing flows reduce friction for non-technical users.

AI Capabilities:
ShareFile helps M&A and other deal teams accelerate due diligence with AI-powered document request generation, intelligent file organization, and secure collaboration in a virtual data room environment.

Integrations:
Outlook integration to send/request files via secure ShareFile links, desktop sync apps, and Active Directory/SSO integration; integrates with Microsoft 365/Office for document collaboration workflows.

More information on **manda.co**

More information on **fintalent.com**

securedocs
An Onit Product

SecureDocs
(an Onit product)

onit.com

Due Diligence | HQ: USA | Founded: 2012

SecureDocs is a simple, flat-fee virtual data room for securely storing and sharing sensitive business documents during M&A due diligence, fundraising, and other confidential deal workflows.

Founded in 2012 in Santa Barbara and now part of Onit's legal-tech portfolio, SecureDocs is built around fast self-setup (a room is live in ~10–15 minutes with no sales call) and transparent flat-fee pricing starting at USD 250/month with unlimited users and documents. Core features include granular folder-level permissions, dynamic watermarking, AES-256 encryption, two-factor authentication, built-in e-signature, click-through NDAs, and audit-trail activity reporting across use cases spanning M&A, fundraising, IPOs, litigation, bankruptcy, and ongoing corporate document storage.

Target users:
SMBs · Startups · Mid-Market Companies · Corporate M&A · M&A Advisory · Fundraising

Pricing:
Subscription

Key features:
- Unlimited users and unlimited document storage per flat-fee plan
- 256-bit AES encryption, MFA, and audit trail reporting
- Dynamic watermarking, document expiration, and custom NDA
- Electronic signature via integration
- AWS-hosted with Fujitsu ScanSnap integration

What sets it apart:
- Flat-rate pricing (USD 250/month annually) with unlimited users and storage - eliminates per-user and per-page surprises
- 10-minute setup with minimal training - designed for deal teams who need a room fast
- Part of Onit's legal operations ecosystem bridging VDR and contract lifecycle management

AI Capabilities:
N/A

Integrations:
Google Drive, Dropbox, Box, Salesforce, Microsoft 365, Fujitsu ScanSnap

More information on **manda.co**

More information on **fintalent.com**

ShareVault

sharevault.com

Due Diligence | HQ: USA | Founded: 2003

ShareVault is a virtual data room and secure document sharing platform with strong security controls, used across life sciences and M&A due diligence.

Operating for over 15 years, ShareVault is known for bank-grade security and a strong life sciences focus, serving biotech, pharma, and medical device companies alongside investment banking, private equity, corporate finance, legal, and real estate. Its feature set emphasizes document-level protection - dynamic watermarking, digital rights management, granular per-user/folder permissions, disabled printing and screenshots, page-level activity analytics with user heat maps, and DNFP (protected native-format sharing) for zero-trust collaboration on work-in-progress documents.

Target users:
Life Sciences · Investment Banking · Private Equity · Venture Capital · Corporate Finance · Legal · Real Estate

Pricing:
Subscription

Key features:
- AES-256 encryption at rest and in transit
- Dynamic watermarking, fence view, and IP address restrictions
- Two-factor authentication and SSO
- Customizable permissions, audit trail, and remote shredding
- AI-powered redaction for sensitive information

What sets it apart:
- Strong heritage in life sciences and pharma M&A - one of the most trusted VDRs in biotech licensing
- AI redaction capability to automatically identify and mask sensitive information across large document sets
- Remote shredding of downloaded documents - access can be revoked even from files on recipients' machines

AI Capabilities:
AI-powered document redaction to automatically identify and mask sensitive information (PII and confidential data) across large document sets.

Integrations:
DocuSign, Google Drive, OneDrive, Box, Dropbox, SharePoint

More information on **manda.co**

More information on **fintalent.com**

SmartRoom

smartroom.com

Diligence | HQ: USA | Founded: 2005

SmartRoom is a virtual data room platform for securely managing M&A due diligence, restructuring, and other high-stakes financial transactions, built by BMC Group with a strong footing in investment banking and restructuring workflows.

SmartRoom's standout feature is SmartLock, which can revoke access to documents even after they've been downloaded. It also includes built-in redaction, DocuSign e-signature, and dedicated project managers for complex transactions, and integrates with deal-team systems like DealCloud and Salesforce. Beyond the core VDR, it offers an Investor Portal and SmartLP reporting automation, positioning it as a broader fund-and-deal management suite rather than a standalone data room.

Target users:
Corporate M&A · M&A Advisory · Private Equity

Pricing:
Subscription / transaction – Enterprise VDR technology with predictable pricing: USD 1,000 per transaction or USD 10,000 annually if your firm qualifies.

Key features:
- M&A-focused VDR – Purpose-built for M&A, real estate portfolios and fundraising.
- Security & control – 256-bit encryption, granular permissions and protected sharing for sensitive documents.
- Efficiency – Thoughtful features to reduce clicks and manage complex transactions more easily.smartroom
- Support – Dedicated assistance and full support included for clients.

What sets it apart:
- Strong security posture.
- Operational efficiency with great support for non-technical clients.
- Built for diligence-heavy transactions.

AI Capabilities:
N/A

Integrations:
Works with any CRM platform teams already use; standard enterprise access workflows.

More information on **manda.co**

More information on **fintalent.com**

STERLING

Sterling

sterlingvdr.com

Diligence | HQ: UK | Founded: 1988

Sterling is a premium, AI-enabled VDR provider focused on high-stakes M&A and capital market transactions, blending advanced document security, intelligent workflows and around-the-clock expert support.

Sterling has supported M&A and capital markets for 30+ years, evolving from financial printing into a leading European VDR provider trusted by top banks, PE funds and corporates to deliver secure, concierge-level support on complex, time-critical deals.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Asset Managers · Investment Banking · Law

Pricing:
Subscription – premium project-based and enterprise VDR pricing with free deal prep and transparent quotes per deal; customers pay once rooms go live, with pricing communicated directly by Sterling.

Key features:
- Advanced VDR platform – Secure viewers for Office, PDF, CAD and video, granular IRM, built-in redaction, real-time translation and bidder analytics.
- AI tools – Document classification, automatic organization, gap analysis, anomaly detection and document-level Q&A intelligence to speed review and highlight issues.
- End-to-end service – In-house multilingual team providing 24/7/365 support, room setup, index design, permissions, and Q&A workflows for every project.
- Enterprise-grade security – AES-256 encryption, ISO 27001 certification, GDPR compliance and selectable EU/UK/US hosting with strict data isolation.
- Proven at scale – Infrastructure battle-tested on 10,000+ deals across 187 countries and 90 industries, from mid-market to multi-billion exits.

What sets it apart:
- AI-enhanced workflows that reduce manual review and bidder management.
- Boutique-level service that effectively extends the deal team.
- Proven ability to handle very large, complex and regulated transactions.

AI Capabilities:
Sterling's "AI-enabled" platform includes document classification, gap analysis, anomaly detection and intelligent Q&A at the document level, helping deal teams prioritize review and understand bidder behavior faster.

Integrations:
Integrates with customers' existing workflows and productivity tools, focusing on secure web access, exports and archives.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

CoolLife.io

Vault Rooms
(by CoolLife.io)

vaultrooms.com

All | HQ: USA | Founded: 2006

Vault Rooms by CoolLife.io enables organizations to easily secure, manage confidential transactions from initial engagement through post-closing document retention. The platform supports mergers and acquisitions, capital raising, due diligence, legal matters, audits, board governance, and other secure collaboration requirements.

Built on a single-tenant architecture, Vault Rooms provides organizations with an isolated environment designed to support security, governance, administrative control, and long-term document management. The platform also integrates with the broader CoolLife.io ecosystem, allowing organizations to extend into CRM, workflow automation, reporting, project management, marketing automation, and customer lifecycle management when business requirements expand.

Target users:
Investment Banking · Private Equity · Venture Capital · M&A Advisory · Corporate Development · Commercial Banking · Accounting, Legal & Valuation Firms · Business Brokers · Healthcare & Life Sciences · Manufacturing & Engineering · Government Contractors · Board Governance

Pricing:
Subscription-based pricing with a 3-month Basic plan for short-term projects, annual subscriptions paid monthly, or annual prepaid subscriptions with discounted pricing. Plans scale from individual professionals to enterprise organizations.

Key features:
- Secure Virtual Data Rooms (VDR)
- Single-tenant architecture
- Granular role-based permissions
- Dynamic watermarking
- Complete audit trails and activity reporting
- Secure document sharing and collaboration
- Folder and document organization
- NDA and agreement workflows
- Due diligence management
- Custom room templates
- User and group management
- Two-factor authentication

What sets it apart:
- Single-tenant architecture with isolated customer environments.
- Secure Virtual Data Rooms with granular permissions, watermarking, audit trails, and reporting.
- Expand from a VDR into an integrated business platform without replacing systems.

AI Capabilities:
Vault Rooms intentionally does not incorporate AI within the Virtual Data Room environment. Organizations maintain control over confidential information without AI processing or analysis of documents stored within Vault Rooms.

Integrations:
Integrates with the CoolLife.io platform that includes CRM, workflow automation, secure forms, project management, reporting, email communications, and customer lifecycle management. Supported plans also include integrations with Microsoft Outlook, Gmail, and DocuSign.

More information on **manda.co**

More information on **fintalent.com**

Virtual Vaults

virtualvaults.com

Diligence | HQ: Netherlands | Founded: 2014

Virtual Vaults is an all-in-one platform for dealmakers that covers deal preparation, data room execution and secure archiving, with fixed, transparent pricing and a strong presence in the Benelux market.

Virtual Vaults has become a leading VDR provider in the Benelux, emphasising user-friendly design, fixed pricing and full deal lifecycle support from preparation through execution to archiving.

Target users:
Corporate M&A · M&A Advisory · Private Equity · End client (sell side) · End client (buy side) · Investment Banking · Law Firms

Pricing:
Flat-rate subscription: Basic EUR 438/month; Standard EUR 531/month; Advanced EUR 876/month. Free version + free trial available. All-in-one M&A platform pricing transparent (one of few VDR vendors publishing rates).

Key features:
- Deal preparation & workspaces – Advisors get their own organisation with unlimited projects and preparation rooms to structure documents before going live.
- Data Room – Easy-to-use VDR with unlimited uploads, detailed permissions, Q&A and insight tools across origination to closing.
- Archive – Secure archive offering full audit trail and a structured record of the deal.
- Fixed pricing – Monthly plans with "prices without surprises" across Basic, Advanced and Premium tiers.
- 24/7 support – All plans include 24/7 support.

What sets it apart:
- Full lifecycle tooling in a single interface.
- Predictable pricing with unlimited uploads.
- User experience optimised for advisors and mid-market deals.

AI Capabilities:
N/A

Integrations:
Browser-based platform; integrations emphasised are internal to Virtual Vaults (workspaces/DR/archive) rather than third-party SaaS.

More information on **manda.co**

More information on **fintalent.com**

CHAPTER 5

Due Diligence (Financial · Tech/ Code · Legal)

37 tools

Diligence is where AI has changed daily work most visibly. The 37 tools here read contracts, scan code-bases, screen cyber exposure and reconcile financials - compressing weeks into days. The craft is knowing what each engine actually verifies, and where human judgement still owns the conclusion.

In this chapter: Financial DD · Tech / Code DD · Legal & Contract Review · Cyber

✓ Verified by vendor

CodeDD

codedd.ai

Diligence | HQ: UK | Founded: 2025

CodeDD is an AI-native code auditing platform that provides deal teams with deep, explainable insights into software assets, reducing time and risk in technical due diligence.

Founded in 2025, CodeDD compresses and standardizes technical due diligence and portfolio monitoring for software-heavy businesses. By applying AI to the codebase itself, it reduces the manual load on CTOs, advisors, and engineering teams while increasing coverage and consistency - a necessary shift as a growing share of production code is now machine-written.

Target users:
Corporate M&A · Private Equity · Venture Capital · Strategic Software

Pricing:
Pay-per-audit pricing based on repository size of the portfolio scope or enterprise SaaS (for initial DDs and portfolio monitoring); CodeDD typically provides custom quotes for each engagement.

Key features:
- Automated analysis of entire codebases - 1800+ technology and architecture patterns, plus AI-validated security and per-file quality review - delivering consistent reports in hours rather than weeks.
- Quantification of technical debt, security posture, and remediation effort in time and money - so findings can inform valuation and deal terms.
- Continuous portfolio monitoring of code health, delivery velocity, and security exposure after close.
- Investor-ready outputs that translate technical findings into evidence-backed recommendations a deal team can defend.
- A single workflow spanning pre-deal diligence and post-close value creation.

What sets it apart:
- Helps investors price technical risk into valuations and deal terms.
- Frees CTOs and advisors from sample-based, manual code review - analysis that no longer scales when AI authors much of the code.
- Provides an ongoing early-warning system for portfolio technical health.

AI Capabilities:
Uses context-aware AI - not signature scans alone - to read codebases in architectural and deal context, validate security and quality findings, estimate remediation effort, and track technical debt over time.

Integrations:
Connects to common source-code repositories and CI/CD systems (e.g. GitHub, Azure, Bitbucket) to ingest code and track change. A local-first option keeps source on the client's infrastructure when required.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

LITERA Kira

Kira by Litera

litera.com/products/kira

Diligence | HQ: USA | Founded: 1995

Kira is an AI-powered contract intelligence solution that helps legal teams analyze contracts with proven accuracy, flexible governance controls, and collaborative workflows for high-volume review. Its multi-layer AI combines GenAI with proprietary models to deliver 95% contract review accuracy. Backed by 30 years of legal expertise and a decade of AI innovation from Litera, Kira brings precision and reliability to contract analysis.

Founded in 2011 in Toronto by Noah Waisberg and Alexander Hudek, Kira became a category-leading AI contract analysis platform and is now part of Litera's legal tech suite, serving AmLaw firms, Big Four and corporate legal departments.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Asset Managers · Investment Banking · Law Firms

Pricing:
Kira is now part of Litera's broader Transactional workflow offering, with unlimited document review included in package-based pricing. The exact investment depends on firm size and package tier.

Key features:
- Kira's multi-layer hybrid AI pairs proprietary models (1,400+ smart fields trained on 1M+ documents) with GenAI to deliver 95%+ precision
- Generative Smart Fields, Concept Search, Doc Chat, and Grid Chat let teams extract, find, and answer deal-level questions in natural language
- Collaborative end-to-end workflows run through the Analysis Grid to classify, tag, and compare documents, then export bespoke reports to Word, Excel, or PDF.
- Kira scales from 10 documents to 10,000+ with bulk import, OCR, deduplication, and classification across 100+ languages
- Flexible governance lets firms toggle GenAI on or off by client or jurisdiction, backed by enterprise-grade security and Lito, Litera's award-winning Legal AI agent.

What sets it apart:
- Accuracy you can defend, not a probabilistic guess.
- Scale to any volume without sacrificing quality.
- One connected workflow, not another tool to manage.

AI Capabilities:
Kira combines generative AI with proprietary AI models trained on 1M+ legal contracts to deliver claimed 95%+ contract analysis accuracy. 2026 expansions: Grid Chat (natural language querying over review data), Generative Smart Fields with verified extraction grounding, intelligent workflows for rapid-turn analysis + collaborative reviews.

Integrations:
Virtual data rooms: Intralinks Matter management: HighQ Microsoft 365: works within the tools legal teams already use Microsoft Word: via API (for export and document round-tripping)

More information on **manda.co**

More information on **fintalent.com**

Libra
by Wolters Kluwer

Libra by Wolters Kluwer

libratech.ai

Diligence | HQ: Germany | Founded: 2023

Libra by Wolters Kluwer is a legal AI workspace that automates legal research, drafting and contract review for law firms and in-house teams.

Libra is an AI workspace for legal professionals developed by Berlin-based Libra Technology GmbH, acquired by Wolters Kluwer Legal & Regulatory in November 2025. The platform supports legal research with source-cited answers based on trusted content, document drafting, contract review and bulk document analysis for law firms and corporate legal departments. It is ISO 27001 certified, GDPR compliant and hosted on EEA servers, serving more than 1,200 legal teams primarily in Germany and other European countries.

Target users:
Legal · Corporate M&A

Pricing:
Legal AI workspace licences priced per user and per firm, with enterprise contracts negotiated case-by-case. (no public pricing)

Key features:
- AI legal research with source-cited answers
- Contract review with compliance scoring and citations
- Document drafting and editing (in-app and MS Word)
- Bulk document analysis
- Playbook-based review via AI assistants
- Email drafting and document translation
- Integrations with Word, Outlook, SharePoint and Kleos

What sets it apart:
- Backed by Wolters Kluwer legal content ecosystem
- Source-cited, EU-hosted legal AI (GDPR, ISO 27001)
- Strong footprint among German-speaking legal teams

AI Capabilities:
Generative AI assistant for legal research with grounded, source-cited answers, AI contract review against playbooks with compliance scoring, and automated drafting, translation and bulk document analysis.

Integrations:
Microsoft Word, Microsoft Outlook, SharePoint, Kleos

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

LocateRisk

locaterisk.com

All | HQ: Germany | Founded: 2018

LocateRisk scores a target's cyber risk from the outside, passively and without the target's involvement, across sourcing, diligence and integration.

LocateRisk, based in Darmstadt, provides automated, non-invasive external attack surface analysis and security ratings. Any target can be scored passively from its domain alone, without agents, credentials or the target's involvement, so cyber risk becomes measurable before first contact and before data room access. Deal teams use it to pre-screen targets in sourcing, to quantify and price cyber exposure in due diligence, to map third-party dependencies, and to monitor portfolio companies after closing.

Target users:
Corporate M&A · Private Equity · M&A Advisory

Pricing:
SaaS subscriptions priced by number of monitored entities and scan frequency; single-target assessments for one-off deal work, portfolio packages for recurring monitoring of holdings.

Key features:
- Passive outside-in scoring from a domain alone
- Attack surface discovery incl. shadow IT of previously acquired units
- KPI-based security rating with peer benchmark
- Longlist screening before the LOI
- Third-party and supply chain dependency mapping
- CVE-based vulnerability detection with remediation priorities
- Scan-to-scan diff for integration and portfolio monitoring

What sets it apart:
- Passive scoring before the LOI, no contact or data room needed
- KPI-based score with peer benchmark for IC and pricing
- German provider; GDPR-compliant; KRITIS and public sector

AI Capabilities:
AI helper functions interpret vulnerability data in plain language for non-technical deal teams, generate remediation recommendations and connect findings to external LLMs via MCP interface.

Integrations:
REST API for exporting reports and findings; PDF/CSV export for data rooms; MCP interface for external LLMs; connectors to SIEM platforms such as Sekoia.io; SSO via Entra ID / SAML

More information on **manda.co**

More information on **fintalent.com**

AlphaSense

AlphaSense

alphasense.com

Diligence / Sourcing | HQ: USA | Founded: 2011

AlphaSense is a market intelligence and search platform that uses AI to help financial professionals extract insights from 10,000+ public and private sources.

Market intelligence and search platform using AI to help financial professionals rapidly extract insights from 10,000+ public and private sources including earnings transcripts, filings, expert calls, and broker research.

Target users:
Investment Banking · PE · Corp Dev · Asset Management · Consulting

Pricing:
Subscription

Key features:
- Generative Search across 10,000+ sources
- Generative Grid for multi-document multi-prompt analysis
- Expert Insights (150,000+ expert call transcripts via Tegus)
- Smart Summaries for earnings
- CIM Analyzer & M&A Database

What sets it apart:
- Trusted by 80% of the world's top financial firms - category-defining market intelligence brand
- Acquired Tegus (2023) adding 150,000+ expert call transcripts and deepening private company coverage
- Broadest content universe in the category: SEC filings, broker research, trade journals, expert calls

AI Capabilities:
Generative AI for search, summarization, and multi-document analysis; proprietary Generative Grid for parallel multi-prompt extraction; Smart Summaries for transcripts and expert calls.

Integrations:
Salesforce, Slack, Google Drive, SharePoint, Dropbox, Box, Egnyte; REST/GraphQL API

More information on **manda.co**

More information on **fintalent.com**

Black Duck

blackduck.com

Diligence | HQ: USA | Founded: 2002

Black Duck is an application security company whose open source audits and software composition analysis are a standard component of tech/code due diligence in M&A.

Black Duck provides application security and software composition analysis (SCA) solutions, including Black Duck Audits used in M&A technical due diligence to analyze a target's codebase for open source components, license compliance issues and security vulnerabilities. Formerly the Synopsys Software Integrity Group, the business was acquired by Clearlake Capital and Francisco Partners in 2024 and relaunched as the independent company Black Duck Software, Inc. Its products serve development, security and M&A teams at over 4,000 organizations.

Target users:
Corporate M&A · Private Equity · Investment Banking · Legal

Pricing:
Custom enterprise subscription; typical contracts in the ~22,500 USD/year range for smaller teams and 50,000–250,000+ USD/year for broader deployments

Key features:
- Open source software audits for M&A due diligence
- Software composition analysis (Black Duck SCA)
- Open source license compliance analysis
- Security vulnerability detection
- Snippet/code-matching analysis
- Static analysis (Coverity)
- Polaris SaaS application security platform
- Web services and API risk assessment

What sets it apart:
- De facto standard for open source M&A audits
- Extensive open source component and vulnerability knowledge base
- Full application security portfolio beyond SCA

AI Capabilities:
Offers AI-powered application security capabilities (e.g., Black Duck Signal) and addresses risks from AI-generated code via snippet matching and analysis.

Integrations:
CI/CD tools (Jenkins, GitLab CI, Azure DevOps), IDEs (Visual Studio, IntelliJ), issue trackers (Jira) and major source-code repositories.

More information on **manda.co**

More information on **fintalent.com**

Claira

claira.io

All | HQ: USA | Founded: 2024

Claira is an agentic deal management platform for private markets, automating deal capture, document extraction, and analysis for investment teams.

Agentic deal management platform for private markets that automates deal capture, document extraction, and analysis to help investment teams work faster and preserve institutional knowledge.

Target users:
Private Credit · PE · Investment Banking · Corp Dev

Pricing:
Subscription

Key features:
- Confidential email inbox with AI agent for deal capture & categorization
- AI-powered document extraction and deal analysis
- Deal monitoring against key metrics and covenants
- Market benchmarking across all deals
- Custom 2-way integrations

What sets it apart:
- Purpose-built financial reasoning model trained by bankers, investors, and AI researchers
- Backed by Barclays and Citi - institutional credibility from Day 1
- Flexible deployment options including on-prem and bring-your-own-LLM support

AI Capabilities:
Agentic AI with a proprietary financial reasoning model; automates deal capture from email, document extraction, structured data output, and portfolio monitoring.

Integrations:
Allvue, CRM systems, custom API; cloud, VPC, and on-prem deployment options

More information on **manda.co**

More information on **fintalent.com**

concord

Concord

concord.app

Integration / Diligence | HQ: USA | Founded: 2014

Concord is an end-to-end contract lifecycle management platform offering unlimited documents and e-signatures on every plan, built for rapid deployment.

End-to-end contract lifecycle management (CLM) platform enabling contract creation, negotiation, e-signature, and post-execution tracking. Designed for rapid deployment (1 day) with unlimited documents and e-signatures on all plans.

Target users:
SMBs · Mid-Market

Pricing:
Subscription

Key features:
- Contract drafting from templates with Word/Google Docs-style UI
- Online redlining and counterparty negotiation (no login required)
- Unlimited electronic signatures on all plans
- AI Copilot for contract analysis and reporting
- Renewal and deadline tracking with automated alerts

What sets it apart:
- Unlimited e-signatures included on every plan - no per-signature or per-document fees
- Counterparties can negotiate and redline directly in-browser via shared link with no account required
- Rapid 1-day deployment targeting SMBs priced out of enterprise CLM tools

AI Capabilities:
AI Copilot for contract drafting assistance, intelligent contract search, risk identification, and AI-generated reporting. Available in higher-tier plans.

Integrations:
Salesforce, HubSpot, Slack, Google Workspace, Microsoft 365, Zapier

More information on **manda.co**

More information on **fintalent.com**

DealSage

dealsage.io

Diligence | HQ: USA | Founded: 2025

DealSage is a deal intelligence platform that structures CIM data, benchmarks deals against historical repositories, and generates investment memos.

Deal intelligence platform that structures CIM data, benchmarks deals against historical repositories, automates financial reconciliation, and generates investment memos - building compounding institutional knowledge with every deal.

Target users:
PE · Family Office · Corp Dev · Search Funds · M&A Advisors

Pricing:
Subscription

Key features:
- Auto-extraction of data tables & financials from CIMs
- Benchmark deals against internal repository of past transactions
- Financial reconciliation & QoE analysis
- AI-powered deal scoring against custom rubrics
- Investment memo & document generation

What sets it apart:
- Compounding intelligence model - every processed deal enriches the institutional deal repository
- Financial model and working capital analysis built-in; not just document chat
- Founded by ex-J.P. Morgan banker and ex-Palantir executive

AI Capabilities:
Autonomous DealSage Agent executes multi-step M&A workflows; AI extracts and structures deal data, scores opportunities, reconciles financials, and generates memos.

Integrations:
QuickBooks (P&L reconciliation); export to Word, Excel, PowerPoint

More information on **manda.co**

More information on **fintalent.com**

Diligent

Diligent
(goDiligent.ai)

godiligent.ai

All | HQ: USA | Founded: 2023

Diligent provides AI agents that automate manual KYC and AML workflows -risk reviews, screening and document checks -so compliance teams can process more customers faster while improving consistency and auditability.

Diligent AI is a newer venture distinct from legacy Diligent board software; it focuses on AI-powered compliance for KYC/AML operations. It positions itself as a way to 10x throughput, cut risk review time by 65% and save thousands of hours annually for fast-growing financial institutions.

Target users:
Corporate M&A · Private Equity · Financial Services

Pricing:
Custom, quote-based pricing depending on volume, use cases, and integration scope.

Key features:
- Merchant risk agent – Automatically investigates merchant websites, social media, reviews and registries to identify risky businesses.
- AML screening agent – Clears false positives from sanctions/PEP/adverse media alerts, freeing analysts to focus on genuine risk.
- Document verification agent – Verifies whether submitted documents (e.g., registry extracts, proof of address) meet policy requirements.
- Policy-aware agents – Agents are configured to follow clients' specific risk policies and produce auditable outputs.
- Integration – API, Portal and native integrations with screening tools to fit into existing stacks.

What sets it apart:
- Reduces time and cost of manual KYC/AML processes.
- Proven time and cost reductions in case studies.
- SOC 2 compliance and enterprise security posture.

AI Capabilities:
Uses AI agents to automate KYC/AML checks, case handling, and documentation across existing compliance stacks.

Integrations:
Integrates via APIs, portal, and native connections with screening tools and existing KYC/AML systems.

More information on **manda.co**

More information on **fintalent.com**

DocuSign

docusign.com

All | HQ: USA | Founded: 2003

DocuSign is the global leader in electronic signatures and Intelligent Agreement Management (IAM), automating the agreement lifecycle from preparation through AI-powered analysis.

Global leader in electronic signatures and Intelligent Agreement Management (IAM), enabling organizations to automate the full agreement lifecycle from preparation through signature, storage, and AI-powered analysis.

Target users:
Sales Ops · Procurement · Legal · Finance · HR · Startups · SMBs · Mid-Market · Enterprise

Pricing:
Subscription

Key features:
- Electronic signatures with audit trails, templates, and mobile support
- Intelligent Agreement Management (IAM) platform
- AI-powered contract analysis and data extraction (IRIS engine)
- Automated workflow routing; Remote online notarization (RON)

What sets it apart:
- Global market leader with the largest adoption base - effectively the industry standard for e-signatures
- Proprietary IRIS AI engine dedicated solely to contract data processing; acquired Lexion (AI CLM) in 2024 for USD 165M
- Broadest ecosystem with 400+ pre-built integrations across CRM, ERP, HR, and industry-specific apps

AI Capabilities:
IRIS AI engine for contract data extraction and analysis; IAM platform uses AI for agreement insights, obligation tracking, and workflow automation. Lexion acquisition adds AI-native CLM capabilities.

Integrations:
Salesforce, Microsoft 365, Google Workspace, SAP, Workday, ServiceNow, Slack, Box, 400+ others

More information on **manda.co**

More information on **fintalent.com**

eBrevia

ebrevia.com

Diligence | HQ: USA | Founded: 2011

AI-powered contract review software that extracts key provisions from large document sets to accelerate M&A due diligence.

eBrevia provides AI-based contract analysis software originally developed in partnership with Columbia University to speed up M&A due diligence and contract review. Its Contract Analyzer extracts key provisions from large contract volumes for buy-side and sell-side diligence, lease abstraction and compliance reviews, while DraftPro supports contract drafting. Customers include law firms, corporations, audit and consulting firms and financial institutions such as Baker McKenzie, Norton Rose Fulbright, Intel, SAP, PwC and EY.

Target users:
Legal · M&A Advisory · Corporate M&A · Private Equity · Investment Banking

Pricing:
Usage-based pricing targeted at large law firms and corporates; indicative rate around USD 10,000 per 1,000 contracts reviewed, with enterprise subscriptions custom-quoted.

Key features:
- AI contract analysis and data extraction (Contract Analyzer)
- M&A and transactional due diligence review
- Sell-side and buy-side diligence workflows
- Pre-built and custom-trainable extraction fields
- Contract drafting support (DraftPro)
- Bulk document processing and reporting
- Lease abstraction and compliance review

What sets it apart:
- NLP technology rooted in Columbia University research
- Purpose-built workflows for M&A transactional diligence
- Over a decade of legal AI deployment experience

AI Capabilities:
Uses machine learning and natural language processing to identify and extract key contract provisions, with models refined over a decade of legal and finance use; the company has emphasized enhanced AI capabilities since the 2023 founder buyback.

Integrations:
Box, iManage

More information on **manda.co**

More information on **fintalent.com**

Workday Contract Intelligence
(formerly Evisort)

workday.com

All | HQ: USA | Founded: 2016

Workday Contract Intelligence is an AI-native contract lifecycle management product, originally built by Evisort - Founded in 2016 by a team from Harvard Law School and MIT - and acquired by Workday in 2024. Uses proprietary AI to automatically extract, analyze, and manage contract data at scale.

Sold as Workday Contract Intelligence and Workday Contract Lifecycle Management (CLM), „powered by Evisort AI." The product was originally built by Evisort, Founded in 2016 by Jerry Ting and co-founders from Harvard Law School and MIT, headquartered in San Francisco. Workday acquired Evisort in September 2024 and, by March 2025, folded it into its platform; Evisort no longer exists as a standalone purchasable product. Workday was named a Visionary in the 2025 Gartner Magic Quadrant for CLM. Reference customers from the Evisort era include Microsoft, McKesson, and BNY Mellon. Stated performance: ~21-day average implementation; AI capable of analyzing ~450,000 documents in 24 hours.

Target users:
Mid-Market · Enterprise · Legal · Procurement · Finance · Sales Ops · HR · Regulated Industries (Financial Services, Healthcare, Technology, Government)

Pricing:
Subscription

Key features:
- AI-powered contract data extraction and Document X-Ray
- Automated contract creation, negotiation workflows, and approval routing
- Clause library and risk scoring
- Contract repository with advanced search
- Native Workday integration for procurement and finance workflows

What sets it apart:
- First LLM purpose-built specifically for contracts, trained on legal document structure
- Document X-Ray analyzes terms at any granularity across related transactional documents - beyond clauses
- Now part of Workday - its contract AI connects natively into enterprise HR and finance workflows

AI Capabilities:
Proprietary contract-specific LLM; Document X-Ray for automatic field population and risk scoring; AI-generated summaries; date and amount calculations; risk score assignment. AI is the core of the platform.

Integrations:
Workday (native), Salesforce, ServiceNow, Box, Workato, API

More information on **manda.co**

More information on **fintalent.com**

F2

F2

f2.ai

Diligence | HQ: USA | Founded: 2025

F2 is an AI platform for private markets investors that transforms unstructured data room files into audit-ready financial analysis and IC-ready investment memos.

AI platform for private markets investors that transforms unstructured data room files into structured, audit-ready financial analysis, risk assessments, and IC-ready investment memos - accelerating diligence by 60%+.

Target users:
Private Credit · Private Equity · Commercial Banking

Pricing:
Subscription

Key features:
- Excel Intelligence for complex multi-sheet workbooks
- Automated EBITDA/leverage/covenant calculations
- Sponsor evaluation (fund size, track record)
- IC-ready memo generation
- Audit-ready Excel outputs with live formulas

What sets it apart:
- Spun out of Arc Technologies with deep expertise in private credit underwriting workflows - not a generic AI tool
- Claims 99% accuracy on core financial calculations (EBITDA, leverage, interest coverage)
- Outputs are real, editable Excel files with live formulas - not static PDFs or locked dashboards

AI Capabilities:
Agentic AI processes raw data room files end-to-end: ingests complex Excel files, normalizes financial data, performs calculations, and generates audit-ready memos. Claims 99% accuracy on core financial metrics.

Integrations:
Data room file ingestion (Excel, PDF, PowerPoint); Microsoft Excel output; Enterprise SSO; API

More information on **manda.co**

More information on **fintalent.com**

filerskeepers

✓ Verified by vendor

filerskeepers

filerskeepers.co

Diligence | HQ: Netherlands | Founded: 2018

filerskeepers is a legal-tech company that simplifies the complexities of building and maintaining a data retention schedule, helping organizations confidently determine how long to store data.

With the filerskeepers dashboard, organizations can build bespoke records retention schedules within minutes, receive real-time regulatory updates, and implement retention requirements across their systems through the filerskeepers API and Connectors - helping ensure effective data management, reduce risk, and support legal compliance. Based on all the laws in the world.

Target users:
Multinational organizations · Legal · Privacy · Compliance · Records & Information Management · Law firms · Data Governance · IT · Consultants

Pricing:
Free trial available; paid plans on request

Key features:
- Global data retention requirements by jurisdiction and industry
- Build bespoke records retention schedules in minutes
- Real-time alerts when retention requirements change
- Map retention rules to records, systems, and storage environments
- Microsoft 365, ServiceNow, Workday connectors, and more
- Implement retention requirements directly into enterprise systems through the filerskeepers API

What sets it apart:
- Built specifically for global data retention compliance, rather than broader legal or privacy management
- Combines legal research, technology, and practical implementation support in one offering
- Trusted by 3,500+ industry leaders
- Founded by data protection lawyers with deep expertise in retention compliance
- Professional services support complex retention interpretation, policy development, and implementation
- Broader records management solutions extend retention beyond the schedule, including Defensible Disposal, Defensible Digitization, Audit, and Box Reduction
- Helps organizations manage both digital and physical records across the records lifecycle
- Partner ecosystem of 60+ specialists across records management, data discovery, governance, privacy, and related areas
- Named a Gartner Cool Vendor in Legal and Compliance Automation in 2019

AI Capabilities:
Not a core product offering

Integrations:
Microsoft 365, ServiceNow, Workday, API

More information on **manda.co**

More information on **fintalent.com**

Hebbia

Hebbia

hebbia.co

Diligence | HQ: USA | Founded: 2020

Hebbia is an AI research and reasoning platform using an ‚agent swarm' architecture to process massive document libraries for finance and legal teams.

AI research and reasoning platform processing massive document libraries using its Matrix ‚agent swarm' architecture, enabling finance and legal professionals to extract insights across thousands of documents simultaneously.

Target users:
PE · Investment Banking · Asset Management · Legal

Pricing:
Subscription

Key features:
- Matrix workspace (spreadsheet-like grid of AI-extracted insights)
- Infinite context window for entire data rooms
- Multi-agent swarm architecture
- Cross-document comparison (contracts, financials)
- End-to-end M&A workflow support

What sets it apart:
- Infinite context window + agent swarm enables reasoning over entire data rooms - not just individual documents
- Supports end-to-end M&A workflows (not just single diligence steps) in a connected system
- Acquired FlashDocs (2025) for AI-powered slide deck creation, expanding into deal output generation

AI Capabilities:
Multi-agent ‚agent swarm' architecture with infinite context window; each Matrix cell is AI-generated from source documents; natural language Q&A over large document sets with cited answers.

Integrations:
Slack, Microsoft Teams, SharePoint, Google Drive, Dropbox, Snowflake, Databricks

More information on **manda.co**

More information on **fintalent.com**

Keye

keye.co

Diligence | HQ: USA | Founded: 2024

Keye is an AI-powered due diligence platform built for private equity, automating financial data analysis and cohort modeling from raw data rooms.

AI-powered due diligence platform built for PE that automates financial data analysis, cohort modeling, and insight generation from raw data rooms - delivering investor-grade outputs in minutes.

Target users:
Private Equity

Pricing:
Subscription

Key features:
- Automated data cleaning, normalization & anomaly detection
- AI-generated cohort/retention analysis & unit economics
- PE thesis-calibrated analysis
- Excel export with live formulas
- Chain-of-thought diligence workflow

What sets it apart:
- Built by former PE investors - logic mirrors actual PE workflows, not generic summaries
- Goes beyond document summarization to produce quantitative, investment-grade financial analysis
- Outputs are editable Excel files (not locked PDFs), preserving analyst flexibility

AI Capabilities:
Agentic AI processes unorganized deal file sets through a PE-style chain of thought: cleaning/structuring raw data, running quantitative analyses (cohorts, revenue drivers, cost structures), and synthesizing findings.

Integrations:
Excel (native output), data room file ingestion (Excel, PDF, PowerPoint)

More information on **manda.co**

More information on **fintalent.com**

LEGALIAN

✓ Verified by vendor

Legalian

legalian.io

All | HQ: Germany | Founded: 2023

Legalian.io is a KYC/AML compliance platform offering continuous, real-time monitoring of a client base, handling fragmented registers, extensive sanctions lists, and nested ownership structures in a single portal with a transparent data basis.

Legalian positions itself as an automation layer rather than another tool: it writes results directly back into existing systems, so users only log in when irregularities occur. Traction claims: 100+ customers, 2,300+ active users. Used by firms including PwC and Möhrle Happ Luther. Hosting is offered in the EU or in a Sovereign Cloud Germany option.

Target users:
Legal · Tax · Corporate · Real Estate · Finance and Banking · Insurance

Pricing:
Subscription + usage (hybrid). A fixed monthly subscription (managed or sovereign cloud instance), ongoing Sentinel monitoring, and a per Check Fee charged only per onboarding or material change - nothing in between. PEP and sanctions screening and full control-structure resolution are included in pay-as-you-go; add-ons (video identification, adverse media research, EDD reports, standalone sanctions database) are billed individually.

Key features:
- KYC-Engine – native access to global commercial and transparency registers, 144 countries, 10 of which are connected via direct API integration
- Sanktionsnetzwerk (Sanctions Network) – Goes beyond direct hits by mapping connections and shareholdings around sanctioned entities, including agentic downward searches that registers don't cover.
- EDD Reports – Enhanced due diligence at scale: cross-jurisdictional deep research delivered in hours instead of days or weeks, with every finding sourced.
- Sentinel – Continuous monitoring of the entire client portfolio; UBO, PEP, sanctions, and adverse-media changes are detected within hours, making KYC reactive and 100% change-focused.
- End-to-end workflow: register search → control structure & UBO mapping → PEP/sanctions/adverse-media screening → pre-filled client questionnaires → risk assessment with mandatory human review → audit-ready reporting package

What sets it apart:
- Primary-source data model: registers and sanctions lists are accessed directly at the source - not sourced from aggregators - so every finding stays traceable to its origin.
- Change-focused economics: subscription plus per-event fees mean clients pay for relevant changes, not routine re-checks.
- Automation layer, not another tool: writes back natively into existing practice-management systems

AI Capabilities:
AI is used for research, not for decisions: agentic downward searches around sanctioned entities, automated adverse-media and PEP research across the web and global lists, and our large-scale, language- and format-agnostic deep investigation. Legalian compiles and structures the evidence; the risk assessment itself always requires a human decision - human-in-the-loop review is mandatory in every workflow.

Integrations:
Open native API for integration into any system landscape (practice management, CRM, DMS, etc.), plus out-of-the-box standard integrations with DATEV, Vertec, ADVOSERVICE, and other common practice-management tools. Legalian writes results back directly into existing systems, so it operates as an automation layer rather than a separate tool.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Lexcel

lexcel.ai

All | HQ: USA | Founded: 2024

Lexcel is the AI operating system for RWI and W&I underwriting, running specialty insurance workflows from submission to claims with underwriters and brokers on live M&A deal materials.

AI operating system for RWI (US) and W&I (Europe/international) and broader transactional liability insurance. Lexcel embeds with underwriters and brokers to run agentic workflows from submission through quote, underwriting, bind, and claims: playbook-based purchase agreement and warranty review, NBIL / indication support, exclusion and memo drafting, and claims coverage analysis. Built for specialty insurance teams on live deal materials, with citations, verification, and underwriter final say. Not generic legal AI and not model training on client books.

Target users:
RWI / W&I Underwriters · Transactional Liability & Specialty MGAs/Carriers · RWI / W&I & Transactional-Risk Brokers · M&A Advisers

Pricing:
Subscription (commercial pilots and annual contracts)

Key features:
- Matter-centric underwriting workbench for each RWI/W&I submission or claim
- Email-driven intake and structured deal fields with source trail
- Submission overview and NBIL / indication drafting
- Playbook-based purchase agreement, SPA, and warranty (rep) review with exclusion support
- Cited underwriting memos
- Multi-step verification of extracted findings against source materials
- Claims coverage letter drafting from policy, underwriting file, and deal record
- Sync with systems of record and document systems (e.g. Salesforce, SharePoint, Box)
- Firm-owned institutional memory across historical RWI/W&I placements and claims

What sets it apart:
- Purpose-built for RWI (US) and W&I (Europe/international) and transactional liability: agentic underwriting workbench from submission to claims, used with underwriters and brokers on live M&A deal files
- Forward-deployed delivery: workflows and integrations designed with the desk on their own playbooks and systems (e.g. Salesforce, SharePoint), not shelf software the buyer finishes alone
- Compounding institutional memory on the firm's historical book, with citations, verification, and underwriter final say; SOC 2 Type II; underwriters report quoting review moving from multi-hour review toward about 30 minutes on live work

AI Capabilities:
Multi-agent (agentic) workflows on an underwriting workbench: extract and verify fields against cited SPA/APA, diligence, and submission materials; run playbook warranty/rep reviews; draft NBILs, overviews, and RWI/W&I claims coverage letters. Models are interchangeable by client preference. Client deal materials are not used to train foundation models (zero data retention with model providers). Underwriter keeps final say before bind or outbound.

Integrations:
Salesforce; SharePoint; Box. Work product commonly produced as Word and Excel outputs. Additional DMS / VDR connections (including Datasite-class paths) available by engagement.

More information on **manda.co**

More information on **fintalent.com**

LexisNexis

lexisnexis.com

Diligence | HQ: USA | Founded: 1970

Global legal research and risk intelligence provider whose Nexis Diligence+ platform powers reputational and compliance due diligence.

LexisNexis is a global provider of legal research, news, business information and analytics, part of RELX. For M&A work it supports legal research (Lexis+), company research (Lexis Company Profiles) and enhanced due diligence via Nexis Diligence+, which screens companies and individuals against 36,000+ news sources, sanctions and PEP lists, beneficial ownership data and public records. Its tools are widely used by law firms, corporates and financial institutions for reputational, compliance and background due diligence.

Target users:
Legal · Corporate M&A · Investment Banking · M&A Advisory · Private Equity

Pricing:
Subscriptions typically priced per user and content package. Lexis research plans for law firms start around 114 USD/month per seat (Essential) and 257–324 USD/month for enhanced/professional packages.

Key features:
- Legal research across case law, statutes and secondary sources
- Enhanced due diligence on companies and individuals (Nexis Diligence+)
- Sanctions, PEP and watchlist screening (2.5M+ profiles)
- AI-driven negative news summarization
- Entity relationship and beneficial ownership mapping
- Automated, audit-ready due diligence reports
- Real-time risk monitoring and alerts

What sets it apart:
- Vast archive of news, legal and public records
- Integrated sanctions, PEP and UBO screening
- Part of RELX with global content licensing

AI Capabilities:
Offers generative AI legal research assistants (Lexis+ AI) and AI-driven negative news summarization and risk review in Nexis Diligence+.

Integrations:
N/A

More information on **manda.co**

More information on **fintalent.com**

MARVERI

Marveri

marveri.com

Diligence / Closing | HQ: USA | Founded: 2023

Marveri is an AI-native diligence platform built by MIT PhDs and Big Law M&A attorneys, automating data room organization and disclosure schedule preparation.

AI-native diligence platform built by MIT PhDs and Big Law M&A attorneys, automating data room organization, disclosure schedule preparation, risk flagging, and diligence report generation for corporate and transactional lawyers.

Target users:
M&A Law Firms · Corp Dev · PE / VC

Pricing:
Subscription

Key features:
- Automated data room organization & renaming
- AI diligence reports with risk flagging (change-of-control, uncapped liability)
- Disclosure schedule preparation
- Buy-side & sell-side workflows
- Missing document detection

What sets it apart:
- Founded by two MIT AI/ML PhDs and a former Morrison Foerster M&A attorney - uniquely combines legal domain expertise with deep AI research
- Task-specific AI (not a chatbot) automatically detects issues without requiring lawyers to craft prompts
- Backed by Bessemer Venture Partners; early adoption by Big Law firms with strong reviews

AI Capabilities:
Proprietary AI built on MIT PhD research; automatically classifies, organizes, and extracts key provisions from legal documents without prompting; NLP-based risk flagging; no chatbot interface - fully automated task execution.

Integrations:
Data room uploads (direct file ingestion); citation-backed outputs

More information on **manda.co**

More information on **fintalent.com**

Metal AI

metal.ai

Diligence | HQ: USA | Founded: 2023

Metal AI is an institutional intelligence platform purpose-built for PE firms, helping deal teams extract and query data from memos, expert calls, and financial documents.

Institutional intelligence platform purpose-built for PE firms enabling deal teams to extract, structure, and query complex financial and operational data from historical memos, expert calls, and financial documents.

Target users:
Private Equity

Pricing:
Subscription

Key features:
- Unified fund knowledge base (memos, expert calls, board decks, financials)
- Generative AI diligence with source citation
- Fully searchable portfolio data
- CRM integrations
- Secure per-seat SaaS with data isolation

What sets it apart:
- Purpose-built exclusively for PE - not a horizontal AI tool adapted for finance
- Transforms a fund's entire historical knowledge base into a queryable AI layer
- Native CRM integrations with Salesforce, Affinity, and DealCloud - rare among diligence AI tools

AI Capabilities:
LLM-powered analysis of unstructured documents; generative AI for diligence workflows with source citation; chatbot interface for on-demand deal intelligence. Y Combinator-backed; USD 5M seed.

Integrations:
Salesforce, Affinity, DealCloud

More information on **manda.co**

More information on **fintalent.com**

PandaDoc

PandaDoc

pandadoc.com

Signing | HQ: USA | Founded: 2013

PandaDoc is a document automation and e-signature platform built for sales teams, speeding up creation, approval, and signing of proposals and contracts.

Document automation and e-signature platform built primarily for sales teams, enabling faster creation, approval, and signing of proposals, contracts, and quotes through drag-and-drop workflows and CRM integrations.

Target users:
Business Brokers · Boutique M&A Advisors · Corporate Development Teams · Deal-Side SMBs · Sales Teams

Pricing:
Subscription

Key features:
- Drag-and-drop document editor for proposals, quotes, and contracts
- Unlimited document sends and e-signatures on paid plans
- CRM integrations to auto-populate document data
- Document analytics showing recipient engagement
- Payment collection embedded directly in documents

What sets it apart:
- Embedded payment collection lets recipients pay directly within a signed document - unique among mainstream e-signature tools
- Rich document analytics provide real-time visibility into how recipients engage with proposals
- Generous free plan with unlimited e-signature capabilities

AI Capabilities:
AI writing assistant for document drafting; AI-powered content suggestions and auto-fill; smart document analytics. AI features included in Business and Enterprise plans.

Integrations:
Salesforce, HubSpot, Pipedrive, Zoho CRM, Stripe, PayPal, Google Workspace, Microsoft 365, Zapier

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

perceive now

PerceiveNow

perceivenow.ai

Diligence / Sourcing | HQ: USA | Founded: 2020

PerceiveNow is a model-agnostic AI Operating System that connects enterprise data platforms with frontier LLMs, enabling dealmakers to instantly build proprietary, lock-in-free due diligence assets and workflows.

The world's first AI Operating System that empowers dealmakers with model-agnostic, best-in-class intelligence and highest productivity for M&A target sourcing, deep technical due diligence, and risk evaluation.

Target users:
Corporate Development · M&A Advisors · Corporate Venture Capital (CVC) · Strategy Teams

Pricing:
Subscription / Usage

Key features:
- Building Proprietary AI Assets using Frontier LLMs: Empowers deal teams to instantly build, digitize, and own their unique due diligence workflows and custom AI agents. Teams create permanent, proprietary workflow assets using hundreds of customizable templates -without vendor lock-in.
- Unmatched Access to Datasets: Ingests and cross-references over 250 million global scientific and market publications. Connects natively with internal enterprise systems (Microsoft ecosystem, SharePoint, private CRMs, and data lakes) to evaluate technical moats and R&D defensibility against real-world evidence.
- True Model Agnosticism: Operates across all leading frontier LLMs (including OpenAI GPT, Anthropic Claude, and Google Gemini series), dynamically selecting the best model family for specific analytical, reasoning, or extraction tasks.
- High-Precision Accuracy: Delivers verifiable, boardroom-ready intelligence. Built specifically for M&A evaluation where hallucinated data is unacceptable, combining deep algorithmic verification with human-in-the-loop validation for instant, dependable insights.

What sets it apart:
- Instant Process & Workflow Ownership: Dealmakers instantly build and retain full control of their custom due diligence playbooks and workflow assets rather than renting a closed, rigid vendor system.
- Technical Evidence-Based Diligence: Translates raw technical literature and market data into strategic M&A evaluations -assessing technology defensibility and competitive moats to validate valuations.
- Instant Executive Execution: Eliminates weeks of manual analysis by enabling deal teams to execute custom intelligence workflows and generate investment committee packages on demand.

AI Capabilities:
Model Agnostic Engine: Connects seamlessly across frontier LLM ecosystems (Claude, GPT, and Gemini series). Agentic Framework: Uses a proprietary multi-agent architecture designed to automate complex, multi-step research, competitive landscaping, and risk-modeling workflows while preserving enterprise-grade data privacy.

Integrations:
Enterprise Connectivity: Native and custom integration support for internal data environments -including Microsoft platforms (Azure, SharePoint, Office 365, Dynamics), private knowledge bases, data lakes, CRMs, and custom REST APIs.

More information on **manda.co**

More information on **fintalent.com**

pinpoint PREDICTIVE

PinpointAI

pinpoint.ai

Diligence | HQ: Ireland | Founded: 2023

PinpointAI is an AI financial due diligence platform automating the FDD workflow from data upload to branded PowerPoint report, cutting delivery time by up to 60%.

AI financial due diligence platform automating the entire FDD workflow - from data upload to branded PowerPoint report - cutting delivery time by up to 60%, purpose-built for M&A advisory and transaction services teams.

Target users:
M&A Advisory Firms · Transaction Services · Big 4 / Mid-Market Advisory

Pricing:
Subscription

Key features:
- Automated data extraction from trial balances & general ledgers
- Parallel AI agents per FDD scope component
- QoE adjustment scanner with drill-down
- Draft branded PowerPoint FDD report + Excel data book
- Management Q&A generation

What sets it apart:
- End-to-end FDD automation from raw data to client-ready report in hours, not weeks
- Built by ex-Big 4 deal advisers and AI engineers - deep domain fit
- Trusted by Kroll, MNP, Cooper Parry, and other leading advisory firms

AI Capabilities:
Dedicated AI agents run in parallel across each FDD scope component; automatically flags anomalies, identifies QoE adjustments, and generates management questions with rationale.

Integrations:
Google Drive, computer file upload; Excel, PDF, Word, CSV, PowerPoint inputs

More information on **manda.co**

More information on **fintalent.com**

Rapid7

rapid7.com

Diligence | HQ: USA | Founded: 2000

Rapid7 is a global cybersecurity vendor whose Command Platform unifies vulnerability management, detection and response, and exposure management - capabilities relevant to cyber due diligence on M&A targets.

Rapid7 is a publicly listed cybersecurity company (NASDAQ: RPD) headquartered in Boston. Its Command Platform combines exposure management, vulnerability management, attack surface management, cloud security, next-gen SIEM and threat intelligence for more than 11,500 customers worldwide. In an M&A context its assessments and managed detection services are used to evaluate and monitor the cyber risk posture of targets and portfolio companies.

Target users:
Corporate M&A · Private Equity

Pricing:
Rapid7 Command Platform bundles (InsightVM, InsightIDR, etc.) priced based on asset count, event volume and support tier, with custom quotes.

Key features:
- Vulnerability management (InsightVM)
- Exposure and attack surface management
- Next-gen SIEM and detection & response (InsightIDR)
- Cloud-native application protection
- Application security testing
- Threat intelligence
- Security automation and orchestration
- Managed detection and response services

What sets it apart:
- Unified Command Platform across security operations
- 25 years of security expertise and research
- Maintains open-source Metasploit and Velociraptor communities

AI Capabilities:
The Rapid7 Command Platform includes an AI engine that enriches security data with AI and threat intelligence for triage, threat analysis and automated security operations.

Integrations:
AWS, Microsoft Azure, ServiceNow, Slack, Jira and others via the Rapid7 Extensions marketplace

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Sema

semasoftware.com

All | HQ: USA | Founded: 2017

Sema gives investors and acquirers a structured view of software assets across the deal lifecycle, combining code-level due diligence scans with AI-built executive reports on AI defensibility and strategy execution.

Sema provides AI-supported software asset assessments for investors and acquirers: Comprehensive Codebase Scans for technical due diligence (code quality, security, IP risk, GenAI usage, process and team maturity) and Liz Reports, AI-built executive reports that score AI defensibility, product defensibility and strategy execution, benchmarked against 200 public software companies.

Target users:
Corporate M&A · Private Equity · Venture Capital · Strategic Buyers · Investment Banks / M&A Advisers

Pricing:
Subscription / engagement – subscriptions for continuous monitoring; per-engagement pricing for diligence scans and Liz Reports; specific pricing is not public.

Key features:
- Comprehensive Codebase Scans – one-time or continuous assessments covering code quality, security, IP risk, process quality and team quality, including a GenAI Code Bill of Materials and usage heat maps.
- Liz Reports – AI-built reports for deal and portfolio questions: AI defensibility, product defensibility, adjacent-market mapping and strategy-versus-execution alignment, each an interrogable score benchmarked against 200 public software companies.
- Due diligence deliverables – detailed reports and SBOMs that inform investment and M&A decisions, including required remediation.
- Broad investor adoption – used by 7 of the 9 largest global investors; has evaluated codebases of organisations collectively valued at over USD 1T.

What sets it apart:
- Two complementary product lines: code-level scans and executive-level AI reports.
- Opinionated, comparable scores benchmarked against 200 public software companies, not raw dashboards.
- Combination of AI and expert analysis, trusted by leading global investors.

AI Capabilities:
Codebase Scans include a GenAI Code Bill of Materials flagging regulatory and licensing exposure from AI-generated code, with five-pillar analysis: Code Quality, Code IP Risk, Code Security, Process Quality, Team Quality. Liz, Sema's AI agent, reads code, tickets and strategy documents to score AI defensibility, AI adoption and strategy execution – a rating that can be interrogated, re-run and tracked over time. Used to evaluate USD 1T+ of software organizations.

Integrations:
Reads code repositories and work-tracking systems on a read-only basis; outside-in reports require no system access at all. Deliverables integrate into deal and investor workflows as reports and data feeds.

More information on **manda.co**

More information on **fintalent.com**

Shortcut.ai

shortcut.ai

Diligence | HQ: France | Founded: 2024

Shortcut.ai is an AI Excel agent automating complex financial modeling, including LBOs, DCFs, and three-statement models, with industry-leading accuracy.

AI Excel agent automating complex financial modeling - LBOs, DCFs, and 3-statement models - with industry-leading accuracy, enabling finance professionals to complete hours of spreadsheet work in minutes.

Target users:
Investment Banking · PE · Hedge Funds · Asset Management

Pricing:
Subscription

Key features:
- Natural language-driven Excel model building (LBO, DCF, 3-statement)
- Native Excel plug-in for full feature parity
- Formula-driven outputs that update dynamically
- Full audit trail with revert capability
- 90%+ accuracy on SpreadsheetBench benchmark

What sets it apart:
- Highest accuracy Excel AI on the market - 90%+ on SpreadsheetBench vs. ChatGPT and Copilot
- Deployed at 3 of the 5 largest multi-strategy hedge funds; USD 100B+ AUM user base
- Official Microsoft Partner; native Excel plug-in removes friction vs. web-only tools

AI Capabilities:
Agentic AI Excel automation using LLMs; natural language to formula-driven financial model output; SOC 2 Type I certified with zero data retention. Official Microsoft Partner.

Integrations:
Microsoft Excel (native plug-in), Google Sheets (partial), API access

More information on **manda.co**

More information on **fintalent.com**

SMASHDOCs

smashdocs.net

All | HQ: Germany | Founded: 2013

SMASHDOCs is a German web-based document collaboration platform with patented change tracking, used by lawyers and dealmakers to draft and negotiate transaction documents.

SMASHDOCs is a web-based word-processing and document collaboration platform from Munich-based Toppan Merrill GmbH (formerly smartwork solutions GmbH, Founded 2013; part of the Toppan group since 2021). It lets multiple parties draft, review and negotiate complex documents such as transaction and legal agreements in a single version with patented change tracking. It is used by law firms and corporates as an alternative to circulating Word files.

Target users:
Legal · M&A Advisory · Corporate M&A

Pricing:
Document-collaboration licences priced per user and organisation, with negotiated contracts via Toppan Merrill

Key features:
- Real-time multi-party document collaboration
- Patented change-tracking and review technology
- Single document version with full modification archive
- Section-level permissions for internal/external negotiation
- Microsoft Office 365 and Teams integration
- API for embedding into other platforms

What sets it apart:
- Patented change-tracking beyond classic redlining
- One single document version for all parties
- Part of Toppan Merrill's global compliance group

AI Capabilities:
N/A

Integrations:
Microsoft Office 365, Microsoft Teams, API

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

top.legal

TopLegal

top.legal

All | HQ: Germany | Founded: 2020

top.legal is a German AI-native contract lifecycle management platform for creating, negotiating, signing and analyzing contracts.

top.legal is a Munich-based contract intelligence and contract lifecycle management (CLM) platform for sales, procurement, finance and legal teams. It covers contract creation, digital negotiation, approval workflows, e-signature and AI-based contract analysis, positioned as AI-native and DACH-ready. The company states it is the first German CLM platform certified to the ISO/IEC 42001 AI management standard.

Target users:
Legal · Corporate M&A · SME Owners · Procurement-Teams

Pricing:
Basic EUR 25/user/month (min EUR 199/month), Pro EUR 42/user/month (min EUR 750/month), Enterprise on request (annual billing)

Key features:
- Contract creation with templates and clause library
- Digital negotiation dealroom with real-time collaboration
- Automated approval workflows with audit trails
- Electronic signatures
- AI contract analysis, summaries and risk flagging
- Central contract repository
- Legal entity management
- API and integrations (Enterprise)

What sets it apart:
- ISO/IEC 42001-certified AI management (first German CLM)
- DACH-focused, GDPR-compliant platform
- Self-service onboarding, live in two weeks

AI Capabilities:
AI-powered contract drafting, data extraction, summaries and automatic risk/clause flagging, plus an AI contract-insights dashboard on the Enterprise plan.

Integrations:
140+ integrations available on the Enterprise plan; API access

More information on **manda.co**

More information on **fintalent.com**

TotlIQ

toltiq.com

Diligence | HQ: USA | Founded: 2023

TotlIQ is an AI-powered due diligence platform for private markets, letting investment teams upload an entire virtual data room and query it on demand.

AI-powered due diligence platform for private markets enabling investment teams to upload entire virtual data rooms and instantly query financial, legal, operational, and market details with analyst-quality outputs.

Target users:
Private Equity · Private Markets (LP/GP)

Pricing:
Subscription

Key features:
- VDR-native processing with PE-specific metadata
- Curated prompt library by diligence area
- Bulk Query for cross-document extraction
- Data Chat for Excel analysis
- Document Summaries (10 key topics per file)

What sets it apart:
- Model-agnostic platform (OpenAI, Anthropic, Google, Cohere) for best-in-class LLM outputs
- Single-tenant architecture ensures complete data isolation; SOC 2 Type II certified
- Founded by former KKR Partner; deep private markets operational DNA

AI Capabilities:
LLM-powered document querying and analysis across entire virtual data rooms; curated prompt library engineered by diligence experts; source-linked outputs for verification. Model-agnostic: OpenAI, Anthropic, Google, Cohere.

Integrations:
Intapp (partnership for deal execution unification); VDR ingestion

More information on **manda.co**

More information on **fintalent.com**

Tower

withtower.com

Diligence | HQ: USA | Founded: 2024

Tower is an AI-powered due diligence management platform centralizing collection, organization, and review of deal documents for law firms and deal teams.

AI-powered due diligence management platform centralizing collection, organization, and review of deal documents, enabling transactional lawyers and deal teams to extract verified insights with structured citations.

Target users:
Law Firms (AmLaw 50) · Corp Dev / Serial Acquirers · Commercial Real Estate

Pricing:
Subscription

Key features:
- Smart diligence Q&A across thousands of documents with citations
- Automated data room organization & renaming
- Diligence request management with live tracking
- Collaborative workspace with role-based access
- Multi-workstream progress tracking

What sets it apart:
- YC-backed (2024) with narrow, deep focus on diligence management - purpose-built for transactional teams, not general document AI
- Zero-data-retention policy with AI providers and AES-256 encryption with org-specific keys - strong security posture
- Live with AmLaw 50 and Chambers Band 1 law firms, giving it credibility at the highest tier of M&A legal practice

AI Capabilities:
Custom AI built for each diligence stage; NLP-based document Q&A with structured, verifiable citations; automated data room organization; AI models never trained on customer data; SOC 2 Type II certified.

Integrations:
Data rooms (via intelligent sync), external counsel portals; U.S. and Canadian server jurisdiction options

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

TuringText

TuringText
(Turing Technologies GmbH)

turingtext.de

Diligence | HQ: Germany | Founded: 2026

TuringText is a German audit and due diligence firm that combines licensed auditing expertise with its own AI audit software to deliver statutory audits and financial and tax due diligence faster.

TuringText combines an audit and due diligence practice with proprietary AI software that automates routine steps of financial audits and transaction diligence - financial statement analysis and structuring (P&L, balance sheet, cash flow), quality-of-earnings preparation, working capital analysis, risk assessment and sample selection, document review with discrepancy flagging and lead sheet generation - while auditors retain judgment on risk assessment, materiality and complex interpretations. Services cover annual financial statement audits, financial due diligence, tax due diligence and AI consulting/implementation for finance and audit processes. The team includes founder Julius Stauffenberg (enterprise-AI product background) and partners Christian von Hardenberg (audit/financial DD; previously KPMG, Arthur Andersen) and Dr. Peter Eggers (tax DD; previously partner at Baker Tilly, Arthur Andersen).

Target users:
Corporate M&A · Private Equity · Audit and Accounting Firms · In-house Finance Teams

Pricing:
On request

Key features:
- AI-supported financial statement analysis and structuring
- Quality-of-earnings preparation
- Working capital analysis
- Risk assessment and sample selection
- Automated document review with discrepancy flagging
- Lead sheet generation
- Human sign-off on all judgmental decisions

What sets it apart:
- Combines a licensed audit practice with its own AI software rather than software alone
- Human-in-the-loop model: judgment stays with experienced auditors
- States audits up to 50% faster and cheaper on suitable mandates

AI Capabilities:
Proprietary AI audit software automating repetitive audit and diligence steps (statement structuring, QoE, working capital, sampling, document review, lead sheets) with human review of judgmental decisions.

Integrations:
N/A

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

vencortex

vencortex, Inc

(DeOS - Decision Optimization System)

vencortex.com

All | HQ: USA | Founded: 2019

Vencortex's Decision Optimization System (DeOS) empowers private equity, asset managers, and enterprise executives to generate repeatable alpha and maximize shareholder value by fusing hybrid intelligence with advanced causal modeling.

Vencortex's Decision Optimization System (DeOS) empowers private equity, asset managers, and enterprise executives to generate repeatable alpha and maximize shareholder value by fusing hybrid intelligence with advanced causal modeling.

Target users:
Asset managers · Corporate M&A · End client (sell side) M&A advisory · Private Equity

Pricing:
On request.

Key features:
- Solves Suboptimal Decision-Making by addressing cognitive overload, static legacy modeling, and fragmented data using causal AI and scenario simulations for strategic choices.
- Powered by a Full-Stack Architecture, it integrates raw internal and external data into unified decision ontologies to convert complex variables into actionable strategy.
- Its Continuous Operational Learning dynamically updates assumptions and tracks execution velocity to protect margins and scale returns

What sets it apart:
- Features Human + AI Hybrid Synergy that integrates human intuition directly into the algorithmic loop, preserving domain edge while removing human bias.
- Its Modular Decision Templates streamline complex workflows -such as valuation, synergy modeling, and capital allocation -into auditable, repeatable execution systems.
- Moving beyond passive dashboards, the system delivers Outcome-Centric Recommendations that provide explicit, causal roadmaps on how to optimize risk-adjusted outcomes.

AI Capabilities:
DeOS (Decision Optimization System) leverages transformer architectures to harness In-Context Learning (ICL), allowing it to ingest unseen financial tables and historical sequences directly into context for instant, zero-shot predictions without time-consuming model retraining or hyperparameter tuning. To navigate market volatility, DeOS's probabilistic modeling outputs calibrated confidence intervals and dynamic probability distributions rather than static point estimates, effectively quantifying tail risk and market uncertainty. Furthermore, DeOS integrates Causal AI utilizing Structural Causal Models (SCMs) to move beyond mere correlations, pinpointing true cause-and-effect drivers so institutions can run accurate counterfactual scenario testing and stress tests under shifting economic regimes. Ultimately, through Hybrid Intelligence, DeOS fuses human executive domain expertise and qualitative constraints with data-driven algorithmic capabilities, bridging leadership intuition with quantitative rigor to drive highly reliable, risk-adjusted decisions across the entire investment lifecycle.

Integrations:
N/A

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Vitelis

vitelis.com

Diligence · Integration | HQ: USA | Founded: 2024

Vitelis is the Pushbutton Due Diligence platform that delivers consulting-grade, external-first diligence and quantified value-creation opportunities in hours instead of weeks.

Vitelis is the Pushbutton Due Diligence platform for private equity, corporate M&A and consulting firms. It performs consulting-grade, external-first diligence in hours - surfacing risks, competitive gaps, value-creation opportunities and executable playbooks before any internal data is required. Its ‚Value Creation AI' links external market, competitor and customer signals directly to quantified EBITDA and revenue impact. Leading consulting and private equity firms have run 300+ diligences on the platform without a single hallucination.

Target users:
Private Equity · Corporate M&A · M&A Advisory

Pricing: Costs vary per contract

Key features:
- Pushbutton due diligence - two weeks of consulting work delivered in hours
- External-first analysis across competitors, customers, suppliers, markets and best practices
- Quantified findings: EBITDA, revenue and risk impact, not observations
- Modules for commercial, operational, digital, AI maturity, CX, supply chain and functional diligence
- Executable value-creation and 100-day playbooks
- Adapts to your investment thesis, diligence methodology and proprietary frameworks
- Source-linked, audit-ready outputs with full traceability to the underlying evidence
- No client data, data room or system integration required to start
- Sovereign deployment option - data never leaves your environment

What sets it apart:
- Delivers consulting-grade findings in hours instead of weeks, before any data room opens
- Quantifies EBITDA, revenue and risk impact - value-creation opportunities, not observations
- Finds risks and upside that traditional diligence misses, and adapts to your own methodology
- Is proven at scale: 300+ diligences run without a single hallucination

AI Capabilities:
Proprietary ‚Business World Model' - causal business reasoning, not generic LLM chat. It reasons over 425,000+ KPIs and 11 million validated causal pathways, trained on Big Four consulting methodologies, to trace external signals to quantified P&L impact rather than generate text. Every finding is source-linked and audit-ready. Quality is proven at scale: leading consulting and private equity firms have run 300+ due diligences on the platform without a single hallucination. Available as a sovereign deployment where client data never leaves the customer's environment.

Integrations:
None required. Vitelis runs external-first, so a diligence can start without any client system access. Optional: ingestion of data, target lists and proprietary frameworks

More information on **manda.co**

More information on **fintalent.com**

Wokelo

Wokelo

wokelo.ai

Diligence / Sourcing | HQ: USA | Founded: 2022

Wokelo is an agentic AI platform for investment research and commercial due diligence, automating workflows from sector analysis to formatted PowerPoint deliverables.

Agentic AI platform for investment research and commercial due diligence automating end-to-end research workflows - from sector analysis to formatted PowerPoint deliverables - trusted by KPMG, SoftBank, and leading PE firms.

Target users:
PE · Corp Dev · Investment Banking · Consulting

Pricing:
Subscription

Key features:
- Automated due diligence reports from news, filings, transcripts & private data
- Sector & competitive landscape reports
- Secure data room for proprietary document analysis
- PowerPoint generator for research deliverables
- Q&A chat for iterative research

What sets it apart:
- Founded by ex-McKinsey/BCG consultants - outputs match management consulting report formats
- End-to-end automation: from raw research brief to formatted PowerPoint, not just chat
- Raised USD 4M+ and trusted by Tier-1 clients: KPMG, SoftBank, and top PE firms

AI Capabilities:
Uses GPT and proprietary NLP models with a custom chunking algorithm; automates multi-source research synthesis into structured reports and PowerPoint decks.

Integrations:
Public data sources, news, filings, podcasts, product reviews; OpenAI GPT (underlying models)

More information on **manda.co**

More information on **fintalent.com**

Zuva

zuva.ai

Diligence / Closing | HQ: USA | Founded: 2021

Zuva is a contracts AI platform spun out of Kira Systems with 1,400+ pre-built AI fields for extracting key data from legal agreements.

Contracts AI platform spun out of Kira Systems with 1,400+ pre-built AI fields for extracting key data from legal agreements - enabling fast M&A diligence screening and disclosure schedule generation.

Target users:
Investment Banking · Law Firms · Corporate Development · Big 4 Accounting

Pricing:
Usage-based

Key features:
- 1,400+ pre-built AI extraction fields
- Zuva Analyze (ML + generative AI for large doc sets)
- M&A Sell-Side product for pre-screening & disclosure schedules
- No-code custom field training; Developer API

What sets it apart:
- Lineage from Kira Systems (trusted by 18 of top 25 M&A law firms and all Big 4) gives unmatched model accuracy
- 1,400+ pre-built AI fields - broadest out-of-the-box contract extraction coverage in market
- Dual delivery: standalone SaaS products and an API for embedding AI into any platform

AI Capabilities:
Proprietary ML models trained on millions of legal documents extract granular clause-level data. Zuva Analyze combines ML extraction with generative AI for contextual analysis with minimal hallucination risk.

Integrations:
API-first; integrates into any third-party platform or VDR via API

More information on **manda.co**

More information on **fintalent.com**

CHAPTER 6

Valuation & Financial Analytics / BI

12 tools

12 platforms for the numbers behind the narrative: valuation engines, FP&A operating systems and BI layers that keep Excel at the centre while automating what surrounds it. The common promise: faster scenarios, defensible assumptions, and finance data that answers questions in plain language.

In this chapter: Valuation · FP&A · Financial BI

✓ Verified by vendor

datarails

Datarails

datarails.com

All | HQ: USA | Founded: 2015

Datarails FinanceOS is the governed, Excel-native AI Finance Operating System that consolidates financial data into one source of truth, encodes each company's own business logic, and gives every forecast, report, and AI output a trusted, audit-ready foundation.

Founded in 2015 in New York, Datarails FinanceOS targets mid-market finance teams that rely heavily on Excel. FinanceOS gives generative AI a governed layer of financial truth, letting CFOs and FP&A teams query their data conversationally while every response stays grounded in the company's actual, audited numbers.

Target users:
Corporate M&A · Private Equity · CFO / Finance/FP&A/ Controllers

Pricing:
Subscription-based SaaS with pricing tailored to company size and usage.

Key features:
- Consolidates financial data from Excel, ERP, CRM, and other systems into one governed data model - a single source of truth for finance and AI.
- Automates budgeting, forecasting, and variance analysis workflows while keeping Excel as the front end, powered by live DR.GET formulas.
- A governed AI layer that lets finance leaders ask natural-language questions of their company's financials and get grounded, audit-ready responses.
- Cash management and scenario tools for managing liquidity and planning under uncertainty.
- Integrations across 600+ finance and business systems, exposed through a governed semantic layer any AI tool can query.

What sets it apart:
- Replaces manual consolidation and reporting effort with a governed data layer built for finance, not IT.
- Enables faster scenario analysis and decision support on numbers finance already trusts.
- Bridges Excel-native workflows with modern AI, without asking finance to leave the spreadsheet.

AI Capabilities:
Uses generative AI and NLP on top of a governed semantic layer to answer questions about financial data, generate variance explanations, and support planning and scenario analysis: reducing hallucinations by giving AI the context it would otherwise have to guess.

Integrations:
600+ data sources including accounting systems, ERPs, CRMs, banks, and HRIS platforms, unified into one governed model with Excel at the core.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

mar:lean

mar:lean

marlean.com

Valuation / Sourcing | HQ: Germany | Founded: 2026

mar:lean is a German technology-intelligence platform that combines technology analytics with market valuation to support IP-driven licensing, M&A and investment decisions.

mar:lean builds data-driven technology-intelligence tools that make technologies, products and markets readable by combining patent analysis with market valuation. Its mar:val module provides independent technology and market valuations, competitive analysis, buyer matchmaking and investment signal tracking for licensing, M&A and investment decisions; mar:ker turns invention disclosures into submission-ready patent applications, and a financing module (mar:fin) is in development. Target users include patent professionals, corporate IP teams and technology companies.

Target users:
Corporate M&A · Private Equity · SME Owners

Pricing:
Technology-valuation and IP intelligence subscriptions priced according to modules (mar:val, mar:ker, mar:fin) and usage.

Key features:
- Patent-based technology intelligence
- Independent technology and market valuation (mar:val)
- Competitive positioning analysis
- Buyer matchmaking for technology assets
- Investment signal tracking
- AI-assisted patent drafting from invention disclosures (mar:ker)
- IP-backed financing module in development (mar:fin)

What sets it apart:
- Links patent data directly to market valuation
- Buyer matchmaking for technology portfolios
- Covers drafting, valuation and IP financing in one suite

AI Capabilities:
AI-generated patent claims, prior-art analysis and consistency checks in mar:ker; data-driven valuation and signal analytics in mar:val.

Integrations:
Operates as SaaS platform with export capabilities for IP and valuation data

More information on **manda.co**

More information on **fintalent.com**

Full Stack Modeller fullstackmodeller.com

All | HQ: UK | Founded: 2020

Full Stack Modeller is a specialist Excel and financial modelling training community that equips finance and M&A teams with consistent modelling standards, hands-on practice and accredited learning paths.

Full Stack Modeller is run by experienced financial modellers, including co-founder and MD Giles Male, who combine Excel, modelling and analytics expertise with a community-centric approach to professional development. It serves thousands of finance professionals globally across corporate, PE-backed and advisory environments.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · Investment Banking

Pricing:
Subscription – per-seat or per-person membership with transparent public pricing (e.g. around GBP 48 per seat per month for business subscription; higher-priced bootcamp and Pro tiers including live training and exam sittings).

Key features:
- Comprehensive curriculum – One journey covering core Excel, advanced financial modelling and data visualisation, aligned with real-world finance workflows and the FMI AFM exam.
- Case-study driven – Hands-on exercises and challenges that move learners from theory to practical, production-ready models.
- Community & mentoring – Global community, live events and regular support so modellers can get feedback and share best practices.
- Business programmes – Team-focused offerings with skills assessments, dedicated training areas and structured cohorts for corporate finance departments.
- Accreditation & CPD – 150+ hours of CPD content and accredited training that prepares members for the Financial Modelling Institute exams.

What sets it apart:
- Purpose-built for finance modellers.
- Transparent, flexible membership tiers for individuals and teams.
- Combination of asynchronous content, live bootcamps and community support.

AI Capabilities:
N/A

Integrations:
N/A

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

loyos

loyos.de

All | HQ: Germany | Founded: 2020

loyos is a SaaS provider specialising in business intelligence and reporting solutions for private equity and SMEs, helping companies make their data visible and actionable for data-driven decisions.

loyos focuses on making BI accessible for mid-sized firms and financial sponsors, providing ready-made reporting suites instead of complex custom BI projects.

Target users:
Private Equity · Corporate Finance · SMEs · Portfolio Companies

Pricing:
Subscription – SaaS pricing for BI/reporting suites; specific price points are not publicly disclosed.

Key features:
- Financial Management Suite – Reporting-as-a-service for financial planning, forecasting and consolidation, based on Microsoft Power BI.
- HR Reporting Suite – Standardised HR dashboards and analytics for workforce transparency.
- Portfolio management – Tools for PE investors and holding companies to monitor portfolio performance.
- BI expertise – Combines domain knowledge with BI to visualise data for better management decisions.

What sets it apart:
- Combines domain and BI expertise.
- Designed for PE and SME contexts.
- Uses familiar Microsoft BI stack.

AI Capabilities:
State-of-the-art AI (Azure AI Foundry, integrated in Microsoft Fabric) analyzes financial data and auto-generates board-ready packages with multi-dimensional explanation of trends, variances & KPI relationships.

Integrations:
Built on Microsoft Power BI and MS Fabric; integrates with clients' underlying ERP/finance systems through standard connectors.

More information on **manda.co**

More information on **fintalent.com**

Lucanet

Lucanet

lucanet.com

All | HQ: Germany | Founded: 1999

Lucanet provides a CFO platform that consolidates financial data, planning and consolidation workflows, with AI agents and use cases that support M&A due diligence, scenario planning and post-merger reporting.

Lucanet serves 6,000+ finance teams globally, positioning its CFO Solution Platform as a way to move beyond spreadsheets to integrated, AI-elevated finance operations, including M&A scenarios and PMI.

Target users:
Corporate M&A · Corporate Finance · PE-backed Firms · Groups with Consolidation

Pricing:
Quote-based - terms not publicly disclosed.

Key features:
- Unified financial data – 300+ ETL adapters to pull ERP and other data into one trusted financial data hub.
- Intelligence core – AI engine that powers agentic workflows and insights across the CFO platform.
- Consolidation & planning – Apps for consolidation, xP&A and scenario planning with automation of consolidation steps.
- M&A support – Supports M&A due diligence, scenario planning, streamlined consolidation and PMI KPI tracking.
- Secure cloud – Built on AWS with multi-region redundancy and strong security and compliance posture.

What sets it apart:
- Integrated consolidation, planning and AI.
- Strong data integration capabilities.
- M&A-specific workflows for DD and PMI.

AI Capabilities:
Lucanet's "Intelligence core" layer powers agentic AI that automates workflows, validates data and surfaces insights across scenarios, including M&A use cases like DD and PMI.

Integrations:
300+ ETL adapters for ERPs and systems.

More information on **manda.co**

More information on **fintalent.com**

Model ML

Model ML

modelml.com

Diligence | HQ: USA | Founded: 2023

Model ML is an AI-powered research and workflow automation platform for investment banking and PE, automating pitch decks, memos, and diligence packages.

AI-powered research and workflow automation platform for investment banking and PE, automating pitch decks, investment memos, cross-document bundles, and due diligence packages using agents and no-code workflow design.

Target users:
Investment Banking · PE · Family Offices

Pricing:
Subscription

Key features:
- Agentic document production (pitch decks, IMs, diligence packages)
- No-code workflow designer
- External data integrations (PitchBook, Crunchbase)
- Single-tenant Azure architecture; Formatting verification layers

What sets it apart:
- Single-tenant Azure deployment gives each client full data isolation - key for regulated financial institutions
- Acquired Flippr and Captide to expand data enrichment and market intelligence capabilities
- Raised USD 87.5M total (USD 75M Series A in Nov 2025), signaling rapid institutional adoption

AI Capabilities:
AI agents interpret data schemas, generate transformation code, and assemble institutional documents; NLP-based cross-document analysis and verification; no-code agentic workflow automation.

Integrations:
PitchBook, Crunchbase, Microsoft Azure (native), Microsoft Office (Excel, Word, PowerPoint)

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

MoneySoft®

MoneySoft

moneysoft.com

Valuation | HQ: USA | Founded: 1991

MoneySoft is a long-established US provider of business valuation and M&A deal-analysis software for brokers, advisors, CPAs and buyers.

MoneySoft, Inc. is a Phoenix-based developer of M&A deal-analysis software. Its flagship product, DealSense, is an integrated system covering the full acquisition lifecycle: candidate screening, financial normalization, business valuation, acquisition pricing, deal structuring, capital-stack financing, and post-acquisition ROI modeling. Updated assumptions flow through the full model in real time as due diligence and negotiations evolve. For strategic acquirers, MergerSense models the combined entity to measure accretion, dilution, and free cash flow returns.

Target users:
Strategic Buyers · Independent Sponsors & Family Offices · M&A Advisors & Intermediaries · CPAs & Accountants

Pricing:
Annual subscription, licensed per named user - currently USD 1595 first year, USD 795 annual renewal. Unlimited deals, scenarios, and analyses; no per-deal or per-client fees. Discounts available for M&A Source and AM&AA members.

Key features:
- Candidate screening, normalization, valuation, pricing, and deal structuring in one connected workflow
- Standards-based valuation (IRS Rev. Rul. 59-60, USPAP, SSVS) built into the deal model
- Full capital-stack modeling - senior/junior debt, mezzanine, seller notes, equity tranches
- Eight editable Word reports, from buy-side proposal through sell-side pitchbook

What sets it apart:
- All-in-one valuation-to-deal-structuring workflow (DealSense)
- Serving valuation professionals since 1991
- Built-in report, pitchbook and proposal generation

AI Capabilities:
N/A

Integrations:
ProSight Statement Studies (formerly RMA) and Integra for industry benchmarking; Done Deals, BIZCOMPS, and DealStats for market comparables. Imports financial data from Excel; outputs to Word and Excel.

More information on **manda.co**

More information on **fintalent.com**

ADDING VALUE TO IP
PATEV

✓ Verified by vendor

PATEV

patev.de

All | HQ: Germany | Founded: 2001

PATEV provides IP-centric M&A intelligence, valuation and innovation analytics that help buyers and sellers understand technology leadership, IP value and related risks in transactions.

PATEV has completed around 2,000 transformation projects over 25 years, works with partners such as PwC and EY, and supports leading corporates across Europe, the Americas and Asia on IP-centric M&A, financing and innovation decisions.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Corporate Strategy · Innovation & R&D

Pricing:
Service / subscription – Mix of expert advisory projects and self-service tools; pricing is project- or subscription-based

Key features:
- M&A intelligence – Offers technology M&A intelligence including leadership insight, goodwill calculation, infringement risk mitigation and target fit analysis.
- IP valuation – Provides IP Value Indicator and IP Valuation Reports using income-based approaches and scenarios.
- IP-based finance – Designs structured finance solutions backed by IP portfolios.
- Innovation heatmaps – Delivers global innovation heatmaps and technology leader rankings (TechValue Top 20).
- Self-service tools – Offers tools like PATEV Target Search, Tech Value and IP Value Indicator for faster decisions in M&A and technology investments.

What sets it apart:
- Unique focus on IP as a value and risk driver in M&A.
- Blend of automated tools and expert analysis.
- Extensive track record across industries and geographies.

AI Capabilities:
PATEV's self-service tools and innovation intelligence platform apply data and analytics (including IP-based metrics) to rank technology leaders, estimate IP value and identify promising technology targets, supporting more automated M&A screening. AI tools can access the data via an MCP server.

Integrations:
Self-service tools (Target Search, Tech Value, IP Value Indicator) and bespoke reports integrate into clients' financial models and decision processes.

More information on **manda.co**

More information on **fintalent.com**

Planful

planful.com

All | HQ: USA | Founded: 2001

Planful provides the FP&A operating system for many acquisitive and PE-backed companies, with its Predict suite using AI/ML to improve data quality and forecasting, which supports M&A integration and portfolio planning.

Planful (formerly Host Analytics) has evolved from cloud EPM pioneer to an AI-enhanced FP&A and consolidations platform, with continued investment in native AI/ML for planning and close workflows.

Target users:
Corporate M&A · Corporate Finance · Portfolio Companies · PE-backed Firms · Public Companies

Pricing:
Subscription – annual SaaS licensing scaling from ~15k USD/year entry-level for SMBs to 250k–500k USD for mid-market FP&A + consolidation, with large enterprise deployments 500k–1M+ USD annually; three-year TCO often 800k–2.1M including license and services.

Key features:
- Planful Predict: Signals – Native AI/ML anomaly detection acting like "a million extra sets of eyes" on financial data, flagging anomalies and patterns.
- Planful Predict: Projections – ML-driven predictive forecasting that analyzes historical patterns and populates forecasts with confidence intervals.
- AI persona assistants – Role-based AI personas (Analyst, Planner, Controller) to explain variances, generate narratives and support review workflows.
- Core FP&A & consolidation – Budgeting, scenario planning, consolidations and reporting with driver-based modeling.
- Self-service analytics – Dashboards and ad-hoc analysis for finance and business users.

What sets it apart:
- Mature cloud FP&A capabilities.
- Robust, practical AI features in production (Signals).
- Clear roadmap for broader AI adoption in finance workflows.

AI Capabilities:
Planful Predict uses native AI/ML for anomaly detection and forecasting, and AI persona assistants leverage OpenAI for natural language explanations while keeping calculations on Planful's platform.

Integrations:
Integrates with ERP, HRIS and source systems.

More information on **manda.co**

More information on **fintalent.com**

QUIKIRR

QuikIRR

quikirr.com

Diligence | HQ: USA | Founded: 2023

QuikIRR is an Excel-first deal intelligence platform that automates financial model infrastructure, data cleaning, and investment-grade analysis from raw data room files.

Excel-first deal intelligence platform that automates financial model infrastructure creation, data cleaning, and investment-grade analysis (ARR waterfalls, cohorts, unit economics) from raw data room files.

Target users:
Private Equity · Investment Banking · Private Credit

Pricing:
Subscription

Key features:
- Smart Data Import with AI-powered data cleaning
- Automated ARR waterfalls, cohort analysis & unit economics
- Excel-native output with dynamic formulas; Interactive visualizations for IC memos
- Customizable rules engine

What sets it apart:
- Excel-first philosophy - outputs are real Excel files (not locked dashboards), preserving analyst flexibility
- Automates the most time-intensive parts of financial diligence (data cleaning + model-build) in one workflow
- Available on Microsoft AppSource marketplace for easy enterprise deployment

AI Capabilities:
AI cleans and standardizes raw financial data, detects anomalies, and automates generation of complex financial model infrastructure (ARR waterfalls, cohorts, unit economics) from raw inputs.

Integrations:
Microsoft Excel (core/add-in), Microsoft AppSource; data room file ingestion (Excel, CSV)

More information on **manda.co**

More information on **fintalent.com**

Valuadder

valuadder.com

Valuation | HQ: USA | Founded: 2004

One-time-purchase desktop software for standards-compliant small business valuation using asset, income and market approaches.

ValuAdder is desktop business valuation software (Mac and Windows) from Haleo Corporation, Lake Oswego, Oregon. It supports standard asset-, income- and market-based valuation methods compliant with USPAP, AICPA SSVS No. 1, IVS and IRS Revenue Ruling 59-60, and is used by business owners, buyers, investors and professional advisors for business sales, buyouts, succession, tax and litigation contexts.

Target users:
SME Owners · M&A Advisory · End client (sell side)

Pricing:
One-time perpetual license (no subscription).

Key features:
- Asset-, income- and market-based valuation methods
- Discounted cash flow and capitalized earnings models
- Multiples Maker for industry-specific valuation multiples
- Built-in market data and cost of capital models
- Deal structuring tools
- Professional valuation report generation
- Offline desktop use on Mac and Windows
- Included 200+ page Business Valuation Handbook

What sets it apart:
- One purchase, lifetime access - no subscription
- Compliance with USPAP, AICPA SSVS, IVS standards
- Works offline with local data storage

AI Capabilities:
N/A

Integrations:
Desktop valuation software with import/export interfaces to Excel.

More information on **manda.co**

More information on **fintalent.com**

VALUTICO

Valutico

valutico.com

All | HQ: Austria | Founded: 2014

Valutico is an AI-enabled valuation suite that combines a large M&A and trading-multiples database with smart, semi-automated workflows so practitioners can deliver defensible valuations far faster than with spreadsheets.

Vienna-based Valutico has grown into a global fintech scale-up with offices in Europe, the US and Asia, serving valuation experts in advisory, corporate finance and investment management.

Target users:
Corporate M&A · M&A Advisory · Valuation Specialists · Corporate Finance · Audit & Tax · Private Equity

Pricing:
On request

Key features:
- Large M&A dataset – Access to over 1M transactions across 1,000+ industries and 150+ countries.
- Full valuation suite – Modules for valuations, DoneDiligence, ESG, forecasts, transactions and more.
- Smart valuation tools – 15+ valuation methods with interactive levers for discount rates, premiums and multiples.
- AI for speed & precision – AI tools like Eva AI that cut valuation time by up to 80%.
- Automated reporting – Creates polished, client-ready valuation reports in minutes.

What sets it apart:
- Purpose-built for professional valuations.
- Significant time savings versus manual modelling.
- Strong data plus AI combination.

AI Capabilities:
Valutico positions as ‚the world's leading AI valuation software'. Allows business valuation in minutes using comparable transactions, peers (53,000+), and 28 valuation techniques over 3TB company data.

Integrations:
Integrates into workflows via exports and reporting.

More information on **manda.co**

More information on **fintalent.com**

GUEST VIEW

AI raised the floor, not the ceiling

AI alone can't run a deal end-to-end, but M&A teams are finding it harder to run one without AI. The case for efficiency is clear: about a fifth of companies are running generative AI somewhere in the live deal process. Teams that have adopted it report saving real time on the manual work that infamously consumes hours of deal teams' time. AI is helping shorten the due diligence process and can spin up summaries and PowerPoint decks in seconds. What it can't do is sense whether the target's culture is likely to survive an integration or whether a founder's confidence across the table is real or performed. Strategy still comes from experience and judgment, and neither has become faster.

Yet, security concerns, not the judgement gap, are overwhelmingly the main reason deal teams hesitate to go all-in with AI adoption. What data goes where? Which vendor can actually be trusted? What happens when a regulator asks who accessed a privileged document? Training a public model with client information or breaching a confidentiality obligation because nobody checked where the file went is the kind of risk most teams avoid. Deal teams have always taken measures to ensure their employees understand and uphold confidentiality during a deal. While employees make mistakes and also have the potential to leak important information, they at least have a guardrail the AI still can't manage: discernment.

AI has raised the floor for everyone while doing little for the ceiling. If the whole market can generate the same risk log in eight minutes, the differentiator becomes the talent running the strategy and managing the relationships. AI will keep getting faster. The dealmakers who win aren't going to be the ones who adopted AI first. They'll be the ones using AI's speed and efficiency to enact their strategy faster than ever.



Kison Patel
Founder and CEO of M&A Science

CHAPTER 7

Post-Merger Integration

13 tools

If one chapter grows visibly by 2027, it will be this one - and the M&A Excellence Days 2027 will show which of these tools the M&A Community members ran their integrations on. These 13 tools structure the first 100 days and beyond: integration platforms, synergy tracking, and the newest entrants measuring the human and emotional side of integration, where culture decides what synergy models only assume.

In this chapter: Integration Platforms · Synergy Tracking · People & Culture Analytics



✓ Verified by vendor

HumanaQ

(HumanaQ SL, HumanaQ)

humanaq.com

Diligence / Integration | HQ: Spain | Founded: 2025

HumanaQ quantifies behavioral and leadership execution risk in M&A - cultural due diligence that links people risk to synergy targets and delivery.

HumanaQ is an AI platform for behavioral and execution intelligence in M&A that measures leadership and execution risk across organisations. Using AI-powered cognitive natural language processing (in partnership with MiliMatch's Behavioral Engine), it is built to surface whether combined leadership teams can deliver the deal thesis. It maps decision-making dynamics, communication styles, informal influence networks, quantifies leadership alignment gaps, decision friction and ‚integration debt'. It monitors integration through a structured re-measurement across the hold period, Day 30, 100, 200, 365. Deliverables include Execution Risk Reports, Leadership Alignment Matrices, Integration Risk Heatmaps and Synergy Validation Audits.

Target users:
Private Equity · Corporate M&A (serial acquirers) · Family Offices

Pricing:
Cultural due diligence and execution-risk engagements priced per transaction and portfolio programme, with bespoke quotes for PE, family offices and serial acquirers.

Key features:
- Behavioral analytics via cognitive NLP (objective, not survey-based)
- Leadership Alignment Matrices
- Integration Risk Heatmaps
- Synergy Validation Audits
- Integration monitoring
- Results delivered within 7 days
- Partnership with MiliMatch Behavioral Engine

What sets it apart:
- Objective behavioral data instead of surveys or consultant self-reporting
- Links culture and leadership risk directly to synergies
- Findings within 7 days; monitoring through the first 90 days post-close

AI Capabilities:
AI-powered cognitive natural language processing (with MiliMatch's Behavioral Engine) maps decision-making dynamics, communication styles and informal influence networks; vendor claims 93% accuracy benchmarked against 4.5M data points.

Integrations:
N/A



More information on **manda.co**

More information on **fintalent.com**



✓ Verified by vendor

NayaDaya® ANALYTICS

People Impact Analytics®

by NayaDaya Analytics, Inc.

nayadaya.com

Integration | HQ: Finland | Founded: 2016

Powered by AI and emotional & behavioral science, People Impact Analytics® predicts what drives success or failure in M&A processes - and tells what to do about it.

NayaDaya Analytics, based in Finland, provides People Impact Analytics - an AI- and emotion-science-based diagnostic that reveals people-related risks in M&A integrations and business transformations. Using an anonymous three-question employee survey, the method predicts behavioral outcomes such as people turnover and productivity loss, identifies integration break points and delivers actionable recommendations. The company works with corporates directly and through partners such as Deloitte and smaller M&A advisors.

Target users:
Corporate M&A · Private Equity · M&A Advisory

Pricing:
People Impact Analytics engagements priced per integration / transformation programme and employee count.

Key features:
- Three-question anonymous employee survey
- AI and emotion-behavior-science analysis
- Prediction of people risks (turnover, productivity loss)
- Identification of integration break points
- Root-cause analysis of behavioral outcomes
- Actionable recommendations
- Alignment of predicted behaviors and intended, specific integration strategy and plans
- Multi-language, scalable from 10 to tens of thousands of employees

What sets it apart:
- Actionable M&A-specific insight, delivered by AI and emotion-behavior science
- Multilingual, multi-cultural, validated through hundreds of analyses in many continents
- Enterprise-grade, „partner first" approach including Deloitte

AI Capabilities:
AI and science-based algorithms analyze emotion and behavioral data to predict people risks and opportunities, diagnose root causes, and recommend interventions during M&A integrations.

Integrations:
Integrates with existing employee survey and HR tools to deliver three-question diagnostics with being sensitive to the deal stage

More information on **manda.co**

More information on **fintalent.com**

Akamai

akamai.com

Integration | HQ: USA | Founded: 1998

Akamai provides an intelligent edge and security platform that simplifies post-merger IT integration by unifying access controls and accelerating applications across combined networks.

Akamai is a global cloud and edge security provider whose Intelligent Edge Platform helps enterprises streamline mergers and acquisitions by consolidating networks, securing application access, and providing new employees with fast, secure connectivity to corporate systems without re-architecting legacy infrastructure.

Target users:
Corporate M&A · Private Equity · CIO / IT

Pricing:
Subscription-based - enterprise contracts for CDN, security, and edge compute services priced by usage volume, traffic, and feature bundles. Tailored quotes are negotiated with Akamai's sales organization .

Key features:
- Intelligent edge platform for accelerating and securing web applications and APIs during and after M&A-driven network consolidation.
- Zero trust access and identity-aware security controls to onboard acquired employees securely without extending legacy VPNs.
- Global CDN and application acceleration services that maintain performance for users across combined organizations.
- Advanced security capabilities (e.g., WAF, DDoS mitigation, bot management) that protect merged environments from increased threat surfaces.
- Professional services and reference architectures specifically addressing M&A network integration and application migration scenarios.

What sets it apart:
- Proven at internet scale, handling massive traffic for global enterprises and service providers.
- Combines performance and security services in one edge platform, reducing integration complexity.
- Helps IT teams onboard acquired users and applications faster while maintaining strong security controls.

AI Capabilities:
Uses AI and machine learning across its security and cloud platform, including Akamai Firewall for AI to inspect and filter LLM inputs/outputs, AI-driven threat intelligence and anomaly detection, and an AI inference cloud that runs and protects generative-AI workloads at the edge.

Integrations:
Integrates with identity and access management platforms (e.g., SSO/IdP providers) and existing corporate networks and applications via standard protocols and connectors. Cloud platforms and developer ecosystems, including integrations with major cloud providers, security tools, and observability stacks; customers commonly connect Akamai with CI/CD pipelines, SIEMs, and performance monitoring solutions.

More information on **manda.co**

More information on **fintalent.com**

BeesWall GmbH

beeswall.com

Integration | HQ: Switzerland | Founded: 2020

BeesWall provides a digital knowledge library and navigation layer that helps M&A and corporate teams manage and find critical information across existing content systems during due diligence and integration.

Founded in Switzerland, BeesWall positions itself as the digital knowledge library for lean M&A and complex, document-heavy environments. By providing a navigation and governance layer over existing content systems, it helps teams avoid information overload, reduces the risk of missing critical documents, and supports smoother M&A due diligence and integration projects.It targets R&D, engineering and M&A teams, promising significant time savings, faster onboarding and better control over dispersed documentation across SharePoint, PLM, SAP and local drives.

Target users:
Corporate M&A · Private Equity · Life Sciences · Financial Services

Pricing:
Subscription – tiered licensing with a free plan and a Premium plan around CHF 28 per user per month, plus Enterprise plans with custom integrations and deployment (on-premises or cloud).

Key features:
- Navigation and knowledge layer for existing content repositories (SharePoint, Teams, Google Drive, SAP, network drives) that makes critical documents easy to find.
- Structured, intuitive knowledge trees that cut through clutter and reduce time spent searching for information.
- Focus on regulated and knowledge-intensive sectors such as life sciences and financial services, where documentation and compliance needs are high.
- Use cases across M&A due diligence, post-merger integration, and carve-outs, where teams need fast access to accurate information across entities.
- Enterprise-grade security and access control aligned with underlying platforms.

What sets it apart:
- Storage-neutral – Works as a transparent layer over multiple repositories, minimizing change management.
- Measured efficiency gains – Explicit focus on quantified time savings.
- Cross-functional – Serves both product development and transaction teams, supporting M&A scenarios like due diligence and carve-outs.

AI Capabilities:
N/A

Integrations:
Integrates as a navigation and governance layer on top of SharePoint, Microsoft Teams, Google Drive, SAP, and on-premises file systems.

More information on **manda.co**

More information on **fintalent.com**

boomi

Boomi

boomi.com

Integration | HQ: USA | Founded: 2000

Boomi is a cloud-native integration platform (iPaaS) connecting applications, data, and AI agents, named a Gartner Magic Quadrant Leader for 12 consecutive years.

Cloud-native Integration Platform as a Service (iPaaS) connecting applications, data, and AI agents across cloud and on-premise environments. Named a Gartner Magic Quadrant Leader for iPaaS for 12 consecutive years, serving 30,000+ customers.

Target users:
Mid-to-Large Enterprises · Healthcare · Financial Services · Manufacturing · Public Sector · Retail

Pricing:
Subscription

Key features:
- Low-code visual integration builder (AtomSphere) with 1,500+ pre-built connectors
- API lifecycle management
- Data catalog and governance
- AI agent management platform - orchestrate, govern, and monitor AI agents
- B2B/EDI connectivity

What sets it apart:
- 12 consecutive years as a Gartner Magic Quadrant Leader for iPaaS - industry-leading recognition
- 1,500+ connectors is among the largest pre-built connector libraries in the integration market
- First major iPaaS to launch a dedicated AI Agent Management Platform with 75,000+ agents already in production

AI Capabilities:
Boomi AI provides natural language integration mapping, intelligent connector recommendations, and anomaly detection. AI Agent Management Platform enables design, governance, orchestration, and monitoring of AI agents at scale.

Integrations:
1,500+ native connectors: Salesforce, SAP, Workday, Microsoft 365, AWS, Azure, Google Cloud, ServiceNow, and more

More information on **manda.co**

More information on **fintalent.com**

Cyclr

cyclr.com

All | HQ: UK | Founded: 2013

Cyclr is an embedded integration platform that enables SaaS vendors to offer native integrations and automated workflows to customers via a branded, multi-tenant iPaaS sitting behind their products.

Founded in 2013 in the UK, Cyclr helps SaaS vendors and system integrators accelerate their integration roadmaps by providing a white-label embedded iPaaS. It is often used in M&A and deal tools to connect to CRMs, marketing platforms, and back-office systems without each vendor maintaining dozens of direct integrations.

Target users:
Corporate M&A · M&A Advisory · Private Equity · SaaS Vendors

Pricing:
Subscription-based SaaS with pricing based on connector usage, tenants, and support tier; Cyclr provides quotes on request for SaaS vendors and system integrators.

Key features:
- Embedded iPaaS that sits inside SaaS products and powers their integration marketplaces.
- 500+ pre-built API connectors plus tools to create custom connectors.
- Low-code, visual integration builder for orchestrating workflows between applications.
- White-label deployment so end users experience integrations as part of the SaaS product's own UI.
- Centralized console for managing customer integrations at scale.

What sets it apart:
- Shortens integration time-to-market for SaaS vendors.
- Reduces engineering overhead for building and maintaining connectors.
- Helps M&A and finance tools integrate with broader tech stacks quickly.

AI Capabilities:
Supports AI orchestration workflows that combine third- and first-party data with multiple AI prompts or models, enabling advanced analytics, data transformations, and automated AI-powered processes inside embedded integrations

Integrations:
Integrates with hundreds of SaaS applications via its connector library and APIs, and can be embedded into any SaaS product via white-label widgets and SDKs.

More information on **manda.co**

More information on **fintalent.com**

DEVENSOFT
Powering Your Strategic Growth

Devensoft

devensoft.com

All | HQ: USA | Founded: 2013

Devensoft is an end-to-end M&A execution and integration platform that replaces spreadsheet-driven processes with structured workflows, synergy tracking and compliance-grade audit trails across the full deal lifecycle.

Founded in 2013, Devensoft focuses on helping serial acquirers institutionalize M&A execution. It is used by corporates and PE-backed platforms to organize complex integrations and divestitures.

Target users:
Corporate M&A · Private Equity

Pricing:
Subscription - Tiered pricing (Basic pre-close, Premium end-to-end, Enterprise) with quotes based on users and scope.

Key features:
- Deal tracking from pipeline through diligence, closing, and integration.
- Playbook management to standardize processes across transactions.
- Task, milestone, and dependency tracking across functional teams.
- Dashboards and reports for executives and PMOs.
- ISO 27001 & SOC 2 Type II certified and SSO (SAML 2.0) integration and enterprise-grade security.

What sets it apart:
- Built by M&A practitioners - deep functional fit for corporate development teams managing complex integrations
- Embedded Power BI reporting enables custom reports without engaging vendor for customization
- Single platform covering pipeline through integration avoids data handoff gaps from using separate point solutions

AI Capabilities:
N/A

Integrations:
Integrates with enterprise identity providers via SAML SSO (Microsoft Excel, AWS, Power BI, API); can be used alongside email, spreadsheets, and other corporate systems.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

SAP LeanIX

leanix.net

Integration | HQ: Germany | Founded: 2012

LeanIX (now SAP LeanIX) is an enterprise architecture management platform that gives organizations a single source of truth for their IT landscape during technology transformation and post-merger integration.

SAP LeanIX, founded in Bonn, Germany in 2012 and acquired by SAP in November 2023, centralizes an organization's applications, technology components, risks, and roadmaps in one repository. For M&A integration teams, this matters because combining two companies usually means combining two IT landscapes - LeanIX maps both, flags redundant or end-of-life systems, and builds a roadmap for rationalization and modernization. The platform's three core products (Application Portfolio Management, Technology Risk and Compliance, and Architecture and Roadmap Planning) cover the cycle from documenting the as-is landscape through executing a target-state transformation, with AI features assisting in inventory building and content generation along the way.

Target users:
Enterprise Architects · CIOs · IT Leaders · Mid-to-Large Enterprises

Pricing:
Subscription

Key features:
- Application Portfolio Management for documenting and assessing the full application landscape
- Technology Risk and Compliance module for obsolescence and security risk tracking
- Architecture and Roadmap Planning for target-state design and transformation milestones
- AI-powered inventory builder that extracts architecture elements from diagrams and images
- Prebuilt dashboards, reports, and diagrams for stakeholder reporting

What sets it apart:
- Acquired by SAP in November 2023, pairing EAM with SAP's broader transformation and ERP ecosystem
- Gartner Magic Quadrant Leader for Enterprise Architecture Tools for multiple consecutive years
- Used by 1,000+ organizations including Volkswagen, Adidas, DHL, and Zalando to map IT landscapes during major transformation programs, including M&A integration

AI Capabilities:
AI-powered inventory builder extracts architecture elements from diagrams and images. AI-assisted text creation and translation inside fact sheets. AI Agent Hub for governing AI agents and Model Context Protocol (MCP) servers across the IT landscape.

Integrations:
ServiceNow, Jira, SAP Signavio, SAP S/4HANA, Microsoft 365, GraphQL API, CSV import

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

SDD GROUP
SYSTEM DATA DECOMMISSIONING

SDD Historia

sddgroup.de

Integration | HQ: Germany | Founded: 2022

SDD Group's Historia platform provides a structured way to retire legacy systems while preserving historical data for compliance and analysis during and after M&A.

SDD focuses on the common problem of legacy system decommissioning, offering a SaaS-based, cost-saving solution which is highly relevant in carve-out and post-merger integration contexts.

Target users:
Corporate M&A · Corporate IT · Carve-out & PMI

Pricing:
SaaS pricing at 0,99 Euro per GB per month.

Key features:
- Historia SaaS platform – Extracts and stores structured and unstructured data from legacy systems, providing access via views and reports that mimic original system logic.
- Legacy shutdown – Helps companies shut down post-productive systems, saving up to 80% in operating costs and reducing energy and CO_2 emissions.
- Simple SaaS offering – Emphasises simplicity of offering, pricing, project work and access to historical data.

What sets it apart:
- Clear value proposition around cost and risk.
- SaaS platform plus service.
- Supports M&A by simplifying legacy IT during carve-outs and PMI.

AI Capabilities:
N/A

Integrations:
Integrates with SAP and non-SAP systems via data extraction into Historia.

More information on **manda.co**

More information on **fintalent.com**

shibumi

Shibumi

shibumi.com

Due Diligence / Integration | HQ: USA | Founded: 2011

Shibumi is an enterprise strategic portfolio management platform used by 70+ Fortune 1000 companies and all 10 top global advisory firms for M&A integration tracking.

Enterprise strategic portfolio management platform used by 70+ Fortune 1000 companies and all 10 top global advisory firms, specializing in M&A integration tracking, synergy capture, corporate transformation, and AI investment ROI management.

Target users:
C-suite · PMO Leaders · Enterprise Transformation Teams · Strategic Portfolio & M&A Integration Teams

Pricing:
Subscription

Key features:
- Strategic portfolio and program management at enterprise scale (10,000+ initiatives)
- M&A integration, separation, and synergy tracking modules
- Financial and non-financial benefits tracking and realization
- AI Predict and AI Create for portfolio insights
- Real-time governance dashboards and executive reporting

What sets it apart:
- Purpose-built for M&A integration and synergy tracking - one of the few platforms explicitly designed for post-merger program management
- Used by all 10 of the world's top advisory firms and 70+ Fortune 1000 companies
- AI Predict surfaces risk and performance insights; AI Create assists initiative planning - targeted at strategic decision-support

AI Capabilities:
AI Predict uses ML to forecast program performance and surface risks. AI Create assists in generating and prioritizing strategic initiatives. Natural language querying and AI-driven decision support embedded throughout.

Integrations:
Jira, Microsoft Project, Power BI, Tableau, SAP, Workday, 1,000+ apps via Shibumi Connect and GraphQL API

More information on **manda.co**

More information on **fintalent.com**



Smartsheet

smartsheet.com

Due Diligence / Integration | HQ: USA | Founded: 2005

Smartsheet is a flexible work management platform that integration and deal teams co-opt for M&A tracking when dedicated M&A tools are not in place.

Smartsheet is not M&A-specific, but is frequently adopted by integration teams to coordinate M&A workplans between acquirer and acquired companies, with online sheets used as the central integration task tracker.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital

Pricing:
Subscription – per-user SaaS pricing (Pro, Business, Enterprise); enterprise plans for large M&A programmes.

Key features:
- Online sheets – Spreadsheet-like interface for tracking deals, tasks, owners and timelines.
- Dashboards & reports – Roll-up views for leadership on integration progress and pipeline status.
- Automations – Alerts, reminders and workflow rules triggered by sheet changes.
- Collaboration – Shared sheets and comments for cross-company integration teams.
- AI features - Smart Assist: AI companion for workspace creation and project planning; Smart Flows: natural language-driven multi-step automation builder; Smart Columns: AI-powered columns for categorization and summarization; Smart Agents (Project Manager Agent): monitors progress and flags risks

What sets it apart:
- Smart Agents act as digital coworkers - Project Manager Smart Agent proactively flags risks without being prompted
- Spreadsheet-native UX reduces adoption friction for Excel-centric enterprise teams while adding database, automation, and AI
- Broad enterprise integrations plus government/regulated industry certifications (FedRAMP)

AI Capabilities:
Smart Assist (AI companion), Smart Flows (natural language automation), Smart Columns (AI data classification and summarization), and Smart Agents (autonomous digital coworkers). Project Manager Smart Agent proactively monitors and flags project risks.

Integrations:
Broad ecosystem including Jira, Salesforce, Microsoft 365 (Teams, SharePoint, OneDrive, Outlook, Power BI), Google Workspace, Tableau, Slack, Okta, and many other enterprise apps.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

SNP Group

snpgroup.com

Integration | HQ: Germany | Founded: 1994

SNP Group is a global technology provider specializing in SAP data transformations, carve-outs and ERP restructuring initiatives. Through its Kyano platform, SNP enables organizations to execute carve-outs, reorganizations, mergers and system consolidations quickly and securely.

For more than 30 years, SNP has supported organizations across the full ERP transformation lifecycle - from landscape analysis and scope definition to the execution of system splits, reorganizations, integrations and data migrations. This end-to-end approach enables transactions to be completed faster and more securely while minimizing operational disruption.

Target users:
IT M&A · CIO Organizations · Enterprise Architecture · SAP Program Management · Carve-out and Integration Teams · Transaction Advisors

Pricing:
Subscription / project - Software licensing for SNP Kyano plus consulting and implementation services. Pricing depends on transaction scope, SAP landscape complexity and required services; specific pricing is not public.

Key features:
- SAP landscape discovery - Establish fact-based transparency across ERP systems, organizational units, master and transactional data, interfaces, shared services and technical dependencies.
- Deal perimeter to executable ERP scope - Translate business and legal requirements into an executable SAP and ERP scope, including selection rules, milestones, validation criteria and governance.
- End-to-end transformation execution - Split, reorganize, merge and consolidate SAP systems, organizational structures and data across carve-outs, divestitures and post-merger integrations.
- Kyano-powered selective transformation - Ring-fence, select and migrate precisely the data required for the target organization without transferring unwanted data.
- Day 1 readiness and TSA exit - Execute ERP cutover, stabilization and removal of temporary dependencies to establish operational independence.

What sets it apart:
- More than 30 years of experience in SAP-centric M&A and ERP transformation.
- End-to-end delivery of carve-outs, reorganizations, mergers and consolidations.
- Software-powered execution through the SNP Kyano platform.
- One integrated path from landscape analysis and scope definition to implementation and validation.
- Selective, data-driven transformation approaches that reduce complexity and business disruption.

AI Capabilities:
SNP combines automation, analytics and data-driven decision support throughout the transformation lifecycle. Through Kyano, organizations gain AI-supported insights for scoping, dependency identification, transformation planning and execution validation.

Integrations:
SNP Kyano integrates with SAP ECC, SAP S/4HANA and related SAP landscapes. It supports carve-outs, reorganizations, mergers and selective transformations and connects with partner solutions and complementary transformation services.

More information on **manda.co**

More information on **fintalent.com**

Zscaler

zscaler.com

Integration / Diligence | HQ: USA | Founded: 2007

A zero-trust cloud security platform that accelerates M&A IT integration and divestiture carve-outs by connecting users to applications without merging networks.

Zscaler is a NASDAQ-listed cloud security company (San Jose, California) whose Zero Trust Exchange platform connects users, devices and applications without traditional network-perimeter integration. In M&A and divestitures, this zero-trust approach lets acquirers grant secure application access across merged entities without joining networks, accelerating Day-1 readiness, reducing the risk of ‚buying a breach' and simplifying IT carve-outs.

Target users:
Corporate M&A · Private Equity

Pricing:
Priced per user, per app and per capability (ZIA, ZPA, etc.), with enterprise contracts negotiated by sales.

Key features:
- Zero Trust Exchange cloud security platform
- Secure application access without network merging
- Accelerated Day-1 user access in M&A and divestitures
- Risk profiling of acquired IT environments
- Cloud, remote-access and multi-device support
- Parallel (rather than sequential) IT integration workstreams
- Threat and data protection during transition

What sets it apart:
- Day-1 access without network integration
- Reduces ‚buying a breach' cyber risk in deals
- Runs integration workstreams in parallel, not sequentially

AI Capabilities:
Zscaler applies AI/ML across its Zero Trust Exchange for threat detection, phishing and command-and-control prevention, data classification and risk quantification.

Integrations:
Okta (joint M&A/divestiture solution), Microsoft, CrowdStrike, AWS, Microsoft Azure

More information on **manda.co**

More information on **fintalent.com**

CHAPTER 8

Cross-cutting Platforms, Talent & Financing

27 tools

Not everything fits a deal stage. This closing chapter collects what carries the whole lifecycle: full-suite M&A platforms, talent marketplaces that staff deal teams on demand, financing and succession platforms, and the communities where the profession trains and hires.

In this chapter: Full-Lifecycle Platforms · Talent · Financing & Succession

✓ Verified by vendor

fintalent.com

Fintalent

fintalent.com

All | HQ: UK | Founded: 2019

Fintalent.com is a global platform that matches corporate M&A, PMI, transformation, restructuring, and strategic finance teams with 5,000+ vetted independent professionals, delivering a curated shortlist within 48 hours for freelance, interim, or permanent mandates.

Fintalent.com is a global platform connecting corporate M&A and finance teams with 5,000+ vetted M&A, Integration, Transformation, and Strategic Finance professionals across 52 countries and 20+ industries. Clients post a brief and receive a curated shortlist within 48 hours, powered by data-driven matching and human curation.

Target users:
Asset managers · Corporate M&A · End client (sell side) · M&A advisory · Private Equity · Venture Capital

Pricing:
Engagement-based. No signup fee and no platform subscription for clients; cost depends on the professional's rate, seniority, scope, and engagement length. Independent professionals set their own rates. Posting a brief and receiving a shortlist is free.

Key features:
- Curated shortlist within 48 hours - clients post a project brief and receive a hand-checked shortlist of matched professionals, combining data-driven matching with human review.
- Vetted senior network - 5,000+ independent professionals across 52 countries and 20+ industries, screened for track record in M&A, PMI, transformation, restructuring, and strategic finance.
- Flexible engagement models - freelance, interim, and permanent mandates, so teams add senior capacity for a single project or an ongoing role.
- Full-lifecycle coverage - practices span corporate development, due diligence and valuation, value creation and post-merger integration, transformation and restructuring, and CFO / strategic finance.

What sets it apart:
- Access to senior M&A, PMI, transformation, and finance talent on demand, without long recruiting cycles or agency retainers.
- Receive a curated shortlist within 48 hours, matched to the brief and checked by a human before it reaches the client.
- Scale a team up or down by project, with freelance, interim, and permanent options across 52 countries and 20+ industries.

AI Capabilities:
Fintalent uses proprietary platform data to match a client's brief to relevant professionals, then a human reviews and curates the shortlist before it reaches the client. The matching is data-driven rather than a generative-AI product; human expertise sits at the center of every shortlist.

Integrations:
Integrates with clients' existing collaboration tools (e.g., email, video, and document sharing).

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Leverest

Leverest

leverest.net

Financing Origination, Execution and Portfolio Management | HQ: Germany | Founded: 2020

Leverest is the Private Capital Markets OS connecting PE investors, lenders, advisors, and corporates globally to manage leveraged buyouts, co-invest syndications, infrastructure financings, and refinancings end-to-end - from lender matching and term negotiation through documentation and portfolio monitoring.

Founded in Frankfurt (with offices the US and the UK) in 2020 by former PE investor Jan-Moritz Hohn, Leverest digitizes the private capital deal lifecycle from lender matching and term negotiation through documentation and portfolio monitoring. Leverest serves PE firms, family offices, corporates, banks, and private credit funds across the American and European upper mid-cap to large-cap markets and integrates with leading systems such as Intapp/DealCloud, and LucaNet, as well as external AI assistants via an MCP server. The platform is accessible via mobile and built with enterprise-grade security standards, including ISO 27001 certification and GDPR compliance.

Target users:
Private Equity · Investors · Corporates · Debt Advisors · Lenders

Pricing:
Deal by deal pricing, Subscription

Key features:
- Lender Intelligence: 1,800+ lenders database, relevance scoring, relationship tracking
- Workflow & Marketplace: lender matching, Q&A, data room, digital termgrid for term sheet comparison
- Portfolio Management: KPI, covenant and capital structure monitoring
- Leverest AI, MCP server, mobile app, DealCloud

What sets it apart:
- The Operating System for Private Capital Markets: one platform for the full deal lifecycle
- Unmatched network: 1,800+ lenders marketplace with intelligent matching
- AI-native and enterprise-ready: AI analytics, open connectivity and leading system integrations

AI Capabilities:
Leverest combines AI-powered document and data analytics through Leverest AI, open connectivity via MCP to external AI assistants (e.g., Claude), and intelligent relevance scoring algorithms to match financing needs with the most suitable lenders.

Integrations:
Seamless connectivity with Intapp DealCloud, GLAS, LucaNet, external AI tools via MCP, and any additional client-specific systems through flexible integrations.

More information on **manda.co**

More information on **fintalent.com**

BLUEFLAME AI

Blueflame
(by Datasite)

blueflame.ai

Full Lifecycle | HQ: USA | Founded: 2023

Blueflame is an LLM-agnostic agentic AI platform for investment firms, orchestrating workflows across sourcing, diligence, portfolio monitoring, and investor relations.

LLM-agnostic agentic AI platform for investment firms orchestrating multi-model workflows across sourcing, diligence, portfolio monitoring, and investor relations. Acquired by Datasite in July 2025.

Target users:
PE · Private Credit · Investment Banking · Hedge Funds · Real Estate

Pricing:
Subscription

Key features:
- Blueprints (customizable multi-step agentic workflows)
- LLM-agnostic architecture (Claude, ChatGPT, Gemini, Grok)
- Intelligent data layer unifying internal & external data
- DDQ Manager for automation
- Institutional-grade output generation

What sets it apart:
- LLM-agnostic multi-model orchestration is a core architectural differentiator - no lock-in to a single AI provider
- Acquired by Datasite (July 2025) integrating agentic AI into a leading M&A platform
- Covers the full deal lifecycle - sourcing through portfolio monitoring - not just one diligence stage

AI Capabilities:
Multi-model AI agents (Claude, ChatGPT, Gemini, Grok) decompose tasks and route to best-fit model; agentic Blueprints for repeatable financial workflows; full audit trail and citations on all outputs; SOC 2 Type II.

Integrations:
Microsoft 365 (Outlook, SharePoint), Salesforce, DealCloud, Grata, Datasite, Snowflake, Bipsync

More information on **manda.co**

More information on **fintalent.com**

Circle Square

circlesquare.co.uk

Sourcing | HQ: UK | Founded: 2004

Circle Square is a corporate finance recruitment and executive search firm focused on M&A and related front-office roles rather than a software platform.

Founded in 2004 and headquartered in London, Circle Square has built a reputation as a specialist recruiter for high-calibre finance and investment professionals. The firm focuses on long-term relationships with both clients and candidates, helping firms build out M&A, PE, and corporate development teams.

Target users:
Asset Managers · Corporate M&A · M&A Advisory · Private Equity · Venture Capital

Pricing:
Contingent and retained search fees based on a percentage of compensation or agreed retainers.

Key features:
- Corporate finance focus – Specialization in front-office roles including M&A, ECM, broking and structured finance.
- Global network – Deep relationships across investment banks and advisory boutiques, used to source and place talent.
- End-to-end search – Support from role scoping and candidate sourcing through interview coordination and offer management.

What sets it apart:
- Niche positioning – Focus only on corporate finance and M&A-related roles.
- Relationship-led – Leverages extensive personal networks.
- Boutique approach – Tailored recruitment advisory rather than volume-driven

AI Capabilities:
N/A

Integrations:
Works alongside client HR and talent teams; does not rely on proprietary software platforms for delivery.

More information on **manda.co**

More information on **fintalent.com**

Corporate Finance Institute (CFI)

corporatefinanceinstitute.com

Sourcing | HQ: Canada | Founded: 2016

CFI is an online training and certification platform that helps finance professionals and teams build practical skills in corporate finance, M&A, valuation, FP&A and analytics through structured programs and hands-on case studies.

Founded in 2016 and headquartered in Vancouver, CFI has become a widely used online finance training platform for analysts, associates, and managers across banks, funds, and corporates. It offers a mix of technical courses, certifications, and practical tools that help professionals build job-ready skills in modelling, valuation, M&A, and related areas.

Target users:
Asset managers · Corporate M&A · End client (sell side) · M&A advisory · Private Equity · Venture Capital

Pricing:
Subscription-based pricing with individual plans starting around USD 399–USD 497 per user per year, plus team and enterprise plans with custom pricing.

Key features:
- Certification programs – FMVA, CBCA, FP&A, BIDA and other credentials covering modeling, valuation, credit and analytics.
- On-demand course library – Hundreds of case-based courses on topics like M&A, LBOs, capital markets and Excel modeling.
- Skill assessments – Tests and learning paths to benchmark and upskill teams across core finance competencies.
- Templates & tools – Excel templates, models and checklists that support day-to-day finance work.
- Team solutions – Corporate plans for banks, PE funds and corporates with admin dashboards and progress tracking.

What sets it apart:
- Practitioner-built content aligned with real roles.
- Deep certification catalog for multiple finance tracks.
- Scalable team training offering with analytics.

AI Capabilities:
Provides an AI Tutor - an AI assistant trained on CFI's finance content - that gives instant answers, summaries, and explanations to complement courses and help learners understand financial modelling, valuation, and M&A topics.

Integrations:
Integrates into corporate L&D programs via SSO and reporting APIs; learners can export models and templates into their own toolchains.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Cyndx

cyndx.com

Sourcing | HQ: USA | Founded: 2013

Cyndx is a purpose-built AI platform for dealmakers, combining deal sourcing, investor discovery, valuation and AI-generated research so M&A and capital-raising teams can uncover and analyze opportunities faster.

Founded in 2013 and headquartered in West Palm Beach, Florida, Cyndx provides a suite of AI tools that help M&A advisors, corporates, and investment firms identify targets, investors, and potential buyers more efficiently than manual research and generic databases.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital

Pricing:
Enterprise SaaS with pricing based on seats and modules; Cyndx offers custom quotes for advisors, corporates, and funds, and is open to sell per seat.

Key features:
- Finder – AI-driven deal sourcing engine for mapping niche markets, uncovering comparables and discovering new opportunities.
- Acquirer – Target identification module that finds acquisition candidates aligned with a buyer's strategic criteria, including predictive signals on funding needs.
- Raiser – Investor discovery tool that identifies relevant financial and strategic investors based on sector, deal size and precedent.
- Valer – Valuation engine supporting DCF, PGR, WACC, trading comps and precedent transaction analysis with minimal manual inputs.
- Scholar – Gen-AI–based research assistant that generates detailed reports on companies, industries and transactions from Cyndx's data plus trusted external sources.

What sets it apart:
- Speeds up target and investor identification.
- Uncovers non-obvious relationships and opportunities.
- Helps teams run more comprehensive searches with less manual effort.
- Deep research capabilities

AI Capabilities:
Uses AI and NLP across its Finder and Raiser products to analyze proprietary and third-party data on millions of companies and investors, surfacing relevant matches and insights. Product suite includes: Finder, Raiser, Deal Origination (search & discovery), Valer (sophisticated valuations + comparable company analysis), and Scholar (agentic AI workflows creating 50+ page research reports in minutes).

Integrations:
Integrates with CRM and workflow tools via exports and APIs, allowing users to push discovered targets and investors into their internal systems.

More information on **manda.co**

More information on **fintalent.com**

Dynamo

dynamosoftware.com

All | HQ: USA | Founded: 1998

Dynamo is an AI-powered alternative investment management platform serving 1,000+ clients managing USD 10T+ in AUM, covering front-to-back-office needs.

AI-powered cloud-native alternative investment management platform serving 1,000+ clients managing USD 10T+ in AUM, covering front-to-back-office needs including CRM, deal flow, investor relations, portfolio monitoring, and ESG reporting.

Target users:
GPs · LPs · Fund of Funds · Endowments · Family Offices · Service Providers

Pricing:
Subscription

Key features:
- Full-stack alternative investment platform (CRM, deal flow, investor portal, portfolio monitoring, fund accounting, ESG)
- DynamoAI for auto-tagging, summarization, and data extraction
- LP management and investor relations portal
- Portfolio monitoring and valuation tools
- Research management and compliance reporting

What sets it apart:
- One of the most comprehensive front-to-back-office alternative investment platforms - CRM through fund accounting in one system
- Trusted by 1,000+ clients managing USD 10T+ in AUM - unmatched scale and domain depth in alternatives
- DynamoAI embeds AI across every financial workflow rather than offering it as an add-on

AI Capabilities:
DynamoAI provides auto-tagging, document summarization, financial data extraction from unstructured documents, conversational Q&A over portfolio data, relationship scoring, and call transcript analysis.

Integrations:
Custodians, Bloomberg, eFront, Yardi, Salesforce, DocuSign, SS&C Advent, Microsoft Office, open API

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

efinancialcareers

eFinancialCareers efinancialcareers.com

Sourcing | HQ: UK & Global | Founded: 2000

eFinancialCareers is a global job board and career platform specializing in financial services and financial technology roles, connecting professionals with employers in major financial hubs worldwide.

Founded in 2000, eFinancialCareers connects banks, asset managers, fintechs, and advisory firms with highly skilled finance and technology talent worldwide, with strong presence in hubs like London, New York, Singapore and Hong Kong.

Target users:
Asset managers · Corporate M&A · M&A advisory · Private Equity · Venture Capital

Pricing:
Pricing varies by region and package; quotes available on request.

Key features:
- Job postings and employer profiles targeting finance and tech professionals.
- Candidate search and CV database access for recruiters.
- Analytics and reporting on job performance and campaign effectiveness.
- Programmatic advertising and branding solutions to reach niche audiences.
- Integrations with applicant tracking systems (ATS) and recruitment workflows.

What sets it apart:
- Helps M&A and PE teams reach specialised finance talent.
- Offers analytics on campaign performance.
- Fits into existing ATS-driven hiring processes.

AI Capabilities:
Uses AI and algorithms for candidate matching and job recommendations within its talent marketplace.

Integrations:
Integrates with ATS platforms via job feeds, APIs, and application forwarding; supports programmatic campaigns and tracking.

More information on **manda.co**

More information on **fintalent.com**

experteer

Experteer

experteer.com

Sourcing | HQ: Germany | Founded: 2005

Experteer is a niche executive job board and headhunter network, not an M&A software product; it complements deal platforms by helping firms hire senior finance and strategy talent.

Founded in 2005, Experteer operates as a specialist platform for executive recruitment, particularly in Europe, connecting senior candidates with employers and search firms in sectors such as finance, consulting and corporate leadership.

Target users:
Asset managers · Corporate M&A · M&A advisory · Private Equity · Venture Capital

Pricing:
Subscription-based pricing for candidates and employers with Basic and Premium tiers; exact pricing depends on region and plan.

Key features:
- Executive-only job board with six-figure and senior management roles.
- Candidate database and direct search tools for headhunters and employers.
- Advanced search filters by salary band, experience, location, and industry.
- Applicant management tools, analytics, and branding options for employers.
- AI-powered candidate matching and job recommendations.

What sets it apart:
- Helps M&A and finance employers reach senior talent.
- Offers headhunters direct access to profiles.
- Provides analytics and branding tools for campaigns.

AI Capabilities:
Uses AI for candidate matching, job recommendations, and candidate insights.

Integrations:
Integrates with distribution partners and ATS solutions such as Veritone Hire and eQuest for job syndication and tracking.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Fintalo

fintalo.com

All | HQ: Germany | Founded: 2024

Fintalo is an AI-native, end-to-end operating system for M&A deals that connects advisors, investors, and companies in a single digital workspace. Effectively acting as your AI Analyst on every deal.

Based in the Munich region and backed by Techstars and other investors, Fintalo aims to become the AI-native operating system for private markets and M&A dealmaking. By uniting advisors, investors, and company owners in a single intelligent workspace, Fintalo turns fragmented, manual deal processes into a seamless, AI-driven experience that compresses weeks of due diligence into hours. The result: dealmakers who move faster, spot opportunities others miss, and close with the confidence of having an entire AI analyst team behind every decision.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital

Pricing:
Subscription-based SaaS pricing depending on users, modules, and integration scope.

Key features:
- Central workspace covering the full deal lifecycle from origination to closing.
- Deal management and investor engagement tools that replace fragmented email and spreadsheets.
- Integrations with existing CRMs and virtual data rooms to sync pipeline and document workflows.
- AI infrastructure that learns from completed and failed deals to improve investor longlists and targeting.
- Agentic AI capabilities that automate repetitive tasks and surface insights across private-market transactions.

What sets it apart:
- Reduces manual work and email volume across deals.
- Makes M&A workflows more data-driven and transparent.
- Helps advisors and investors run more deals in parallel.

AI Capabilities:
Fintalo markets itself as an AI-native, agentic M&A OS that uses AI to automate deal workflows and analyse deal histories to optimise investor longlists and decision-making, making Fintalo an additional analyst on every deal.

Integrations:
Integrates with existing CRMs, virtual data rooms and email; positioned as agentic infrastructure that connects to clients' current tool stacks.

More information on **manda.co**

More information on **fintalent.com**

Flippa.

Flippa

flippa.com

All | HQ: Australia | Founded: 2009

Flippa is an AI-enabled exit platform where founders of online businesses get data-backed valuations, global buyer reach and broker plus AI support to run a full exit process from valuation to close.

Founded in 2009 and based in Melbourne with additional hubs in Austin, Amsterdam and Singapore, Flippa has grown into a leading digital M&A platform, closing transactions from USD 10k to 30M and supporting 400k+ weekly active buyers.

Target users:
Corporate M&A · Private Equity · Venture Capital · Asset Managers · End client (sell side) · End client (buy side) · Investment Banking

Pricing:
Listing fee USD 29+ minimum; success fee 5-15% (varies by deal size/type). Example: USD 150K SaaS sale ≈ USD 299 listing + 7% success fee (USD 10,500) = ~USD 10,800 total platform cost.

Key features:
- Curated marketplace – Platform for websites, SaaS, eCommerce, content, apps, domains and social accounts with 1.6M+ registered users.
- Broker network – In-house and partner brokers managing six- and seven-figure deals end-to-end.
- BrokerAI – AI engine that builds CIMs, scores buyers, manages data rooms and keeps deals moving overnight.
- AI valuation & P&L – Data-backed valuations, AI P&L builder and CIM generator using transaction comps and business metrics.
- Deal & data room – Integrated deal room and data room to manage documents, Q&A and milestones.

What sets it apart:
- Specialization in digital assets.
- AI-augmented broker workflows.
- Large, liquid marketplace with global reach.

AI Capabilities:
Flippa's BrokerAI powers valuation, P&L building, CIM creation, buyer matching and data room analysis, helping brokers and founders accelerate digital business exits with AI support.

Integrations:
Integrations with escrow and payment providers, analytics tools and internal AI engines; platform itself acts as the central deal and data room environment.

More information on **manda.co**

More information on **fintalent.com**

Lawtech Group

lawtechgroup.de

All | HQ: Germany | Founded: 2016

Lawtech Group is a digital provider of scientifically based, automated investment systems in litigation funding, enabling cost-efficient, transparent access to justice through process cost investments.

Lawtech Group positions itself as a leading digital provider for litigation cost investment vehicles in German-speaking markets.

Target users:
Law Firms · Corporate Legal · Litigation Funders · Investors

Pricing:
Investment / service – Legal finance and tech service; pricing via investment structures and returns.

Key features:
- Process cost investment system – Automated investment vehicles in litigation funding.
- Data-driven approach – Relies on solid data and long experience to assess cases.
- Access to justice – Aims to give more clients cost-effective access to legal rights.

What sets it apart:
- Specialized litigation finance focus.
- Digital, automated investment system.
- Based on longstanding legal and risk expertise.

AI Capabilities:
Described as data-driven and automated; likely uses analytic models to assess litigation investments.

Integrations:
Integrates into investor and legal workflows.

More information on **manda.co**

More information on **fintalent.com**

LoopNet

loopnet.com

Origination | HQ: USA | Founded: 1995

LoopNet is the #1 commercial real estate digital marketplace with 12M+ unique monthly visitors, a CoStar Group subsidiary since 2012.

#1 commercial real estate digital marketplace with 12M+ unique monthly visitors, offering property listings, marketing solutions, and immersive virtual tours for buyers, sellers, landlords, and tenants. A CoStar Group subsidiary since 2012.

Target users:
Commercial Real Estate Brokers · Property Owners · Investors · Tenants (Office, Retail, Industrial, Multifamily

Pricing:
Subscription

Key features:
- Largest commercial property listing marketplace in the US; Immersive 3D virtual tours and cinematic video
- Premium marketing tiers (Diamond, Platinum, Gold, Silver)
- CoStar-integrated market analytics
- Lead management and inquiry tracking

What sets it apart:
- 12M+ monthly unique visitors - largest audience of any CRE marketplace, delivering unmatched listing exposure
- Backed by CoStar Group's data infrastructure, enabling richer market analytics on listings
- Free basic listings with scalable premium tiers allow access for all market participants

AI Capabilities:
N/A

Integrations:
CoStar platform, MLS/IDX feeds, CRM systems, property management software, API

More information on **manda.co**

More information on **fintalent.com**

M&A Accelerator

ibm.com/products/merger-acquisition

Full Lifecycle | HQ: USA | Founded: 2002

IBM M&A Accelerator is an IBM Consulting offering that gives corporate development and integration teams a single, real-time view across the full M&A deal lifecycle, from pipeline through divestiture.

IBM M&A Accelerator brings deal data and teams together in one real-time, 360-degree view instead of the disconnected spreadsheets and email threads many corporate development teams default to. The platform spans the full deal lifecycle: prospect targeting, execution strategy, planning, and synergy capture and monitoring, with role-based home pages that let a CFO, integration lead, or workstream owner each see what matters most to their part of the deal. Because the offering is delivered through IBM Consulting rather than as self-serve SaaS, organizations often combine the software with IBM's M&A program delivery teams, which can shorten time-to-value but also means pricing and scope depend on the specific engagement rather than published subscription tiers.

Target users:
Corporate Development · Integration Management Offices (IMOs) · Financial Services

Pricing:
N/A

Key features:
- Personalized role-based interface tracking milestones, issues, risks, and synergy initiatives in real time
- Dynamic reporting with dashboards, interactive charts, and a report wizard
- Organized template framework for deal checklists by type, strategic imperative, or geography
- Collaborative project management with advanced scheduling across multiple deals
- Intelligent security flow with SSO, two-factor authentication, and a robust permissions model

What sets it apart:
- Pre-configured integration workstreams across IT, HR, finance, and operations give integration management offices a structured starting point
- Ties committed deal rationale to measurable synergy milestones for board-level accountability
- Delivered as part of IBM Consulting, combining the software with hands-on M&A program support

AI Capabilities:
N/A

Integrations:
Delivered as part of IBM Consulting engagements; connects to client reporting and analytics tools on a project basis.

More information on **manda.co**

More information on **fintalent.com**

M&A Deal Platform

madealplatform.com

Full Lifecycle | HQ: UK | Founded: 2021

M&A Deal Platform is UK-based software that gives accountants and advisory practices AI-assisted valuation, document drafting, and marketplace tools to deliver M&A and exit-planning services to SME clients.

M&A Deal Platform was founded in London in 2021 by James Ruthven, Libor Weigl, and Metin Algir, with a team drawn from companies including Wolters Kluwer, Capita, and WPP. The platform is built around a specific problem: small and medium businesses are often underserved by the standard M&A process, facing lower valuations and slower deals than larger targets. Instead of selling to business owners as the end client, M&A Deal Platform sells to the accountants and corporate finance advisors who serve them, giving those practices an AI Copilot for securely querying client data, automated valuation and document generation, and a Precision.MarketTM marketplace to connect their clients with buyers and partners. Pricing runs from a Professional tier for individuals and SMEs through Practice and Enterprise tiers for growing and larger advisory firms.

Target users:
Corporate Finance Advisors · Accountants · Business Advisory Practices · SMEs

Pricing:
Subscription

Key features:
- Advisor Copilot & Secure Chat GPT for querying client business model and data room
- Valuation Application using market multiples and DCF methodologies
- AI-assisted Business Plan and Information Memorandum drafting (Azure OpenAI/ChatGPT)
- Virtual Data Rooms for secure client data storage
- Precision.MarketTM marketplace connecting business owners with buyers and partners
- Prospect Dashboard CRM for tracking advisory clients

What sets it apart:
- Built for advisory practices and accountants rather than direct buyers or sellers
- AI-assisted drafting of Business Plans and Information Memorandums cuts first-draft time to minutes
- Combines advisory tooling with a marketplace (Precision.MarketTM) for owners, buyers, and partners in one platform

AI Capabilities:
Advisor Copilot and Secure Chat GPT let practice staff securely query a client's business model and data room; Azure OpenAI and ChatGPT generate first-draft Business Plans and Information Memorandums in minutes.

Integrations:
Microsoft Azure OpenAI, Sage, Xero, HubSpot

More information on **manda.co**

More information on **fintalent.com**

Michael Page

MichaelPage

michaelpage.com

Sourcing / Integration | HQ: UK | Founded: 1976

Michael Page (PageGroup) is a global recruitment group whose Page Executive division provides executive search and leadership talent for PE-backed and M&A-active organizations.

Michael Page was founded in London in 1976 by Michael Page and Bill McGregor as a two-person recruitment business, and has grown into PageGroup, a FTSE 250 company operating in 36-37 countries. While Michael Page itself covers professional and management-level recruitment, its Page Executive division is the part most relevant to M&A: a 350-strong global network of search principals and partners who place CEOs, CFOs, investment directors, and other senior leaders for private equity firms and high-growth, deal-active businesses across the investment lifecycle, alongside dedicated General Counsel search for M&A, compliance, and data privacy roles. The group's PageInsights platform, built on Microsoft Power BI, gives clients talent market data drawn from more than 500 million data points across 80,000+ global clients, supporting compensation benchmarking and talent-pool mapping during diligence and post-deal leadership planning.

Target users:
PE Firms · Portfolio Companies · Corporate Development

Pricing:
N/A

Key features:
- Page Executive global executive search network of 350+ principals and partners across 37 countries
- Private equity and M&A leadership search (CEOs, CFOs, investment directors)
- Legal/General Counsel search covering M&A, compliance, and data privacy
- PageInsights data platform drawing on 500M+ data points from 80,000+ global clients
- Enterprise Solutions for bespoke talent strategies at scale

What sets it apart:
- FTSE 250 global recruitment group with a dedicated private equity and M&A leadership search practice
- PageInsights data platform gives clients talent market intelligence drawn from 500M+ data points
- First major recruitment organization to achieve ISO 27001 information security accreditation

AI Capabilities:
N/A

Integrations:
N/A

More information on **manda.co**

More information on **fintalent.com**

Midaxo

midaxo.com

All | HQ: USA (Helsinki origin) | Founded: 2011

Midaxo is a purpose-built M&A platform that gives strategy, pipeline, diligence and integration teams a shared system of record, workflow and intelligence for repeatable, value-focused execution.

Founded in Helsinki and trusted by 500+ deal teams, Midaxo positions itself as purpose-built, repeatable M&A infrastructure that scales from single acquisitions to global pipelines, with real-time visibility across teams and deals.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · End client (buy side) · End client (sell side) · Boards

Pricing:
Subscription – SaaS licensing for corporate development and integration teams, with pricing based on users, modules and support.

Key features:
- Strategy & thesis – Tools to define and manage M&A strategy, themes and thesis-aligned pipelines.
- Pipeline CRM – CRM designed for M&A, not sales, centralizing targets, stages, forecasts and relationship data.
- Diligence project management – Checklists, tasks, approvals, risk tracking and document management purpose-built for complex transactions.
- Integration & value tracking – Post-close workspaces to monitor synergy realization, risks and progress against plans.
- Built-in intelligence – AI-supported insights that surface key risks, patterns and issues from projects and diligence files.

What sets it apart:
- Unifies fragmented deal tools into one system.
- Designed for repeatability and governance at scale.
- Trusted by hundreds of mid-market and enterprise deal teams.

AI Capabilities:
Madi is an embedded AI agent that reads uploaded documents, understands deal context, and surfaces risks, insights, and recommended next steps. Also includes AI-powered document analysis and risk identification.

Integrations:
Integrates with existing enterprise tools (Microsoft Teams, Outlook, Gmail, Slack, Salesforce, PitchBook, SharePoint, Power BI)

More information on **manda.co**

More information on **fintalent.com**

Navima.io

navima.io

All | HQ: UK | Founded: 2021

Navima is an M&A execution and playbook platform that connects pipeline, projects, VDR, reporting and best-practice workflows so teams can increase deal flow, consistency and data-driven decision-making.

Navima positions itself as "the intelligent way to do M&A", combining best-practice playbooks, secure collaboration and reporting with integration to popular business software and hundreds of data connectors.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · End client (buy side) · End client (sell side)

Pricing:
Subscription – SaaS licensing with AI reporting an integrated modules, sold via demos and tailored quotes.

Key features:
- End-to-end process support – Covers buy-side, sell-side and alliance processes with one central platform for projects.
- Integrated tool suite – Pipeline, VDR, document storage, PMO, playbooks and AI reporting in a single system.
- Best-practice playbooks – Embedded playbooks based on 100s of successful global M&A deals created with expert consulting partners.
- Secure collaboration – ISO 27001-certified cloud platform controlling access to documents, tasks, issues and conversations.
- Onboarding & expert support – Structured onboarding and access to experienced M&A consultants to help digitalise M&A processes.

What sets it apart:
- Purpose-built platform rather than repurposed PM tools.
- Strong emphasis on playbooks and expert network.
- Combines pipeline, VDR and PMO in one.

AI Capabilities:
Navima highlights AI reporting within its fully integrated tool suite, using AI to produce insights and reporting across pipelines and projects.

Integrations:
Connects via API to "hundreds of others" tools.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Ontra

ontra.ai

All | HQ: USA | Founded: 2014

Ontra automates critical private market workflows for 9 of the top 10 PEI-ranked firms.

Ontra is the leader in AI-powered solutions for the private markets. Its AI platform automates critical private market workflows across the fund lifecycle.

Target users:
PE · Private Credit · Private Market Fund Managers · Asset Managers · Investment Banks

Pricing:
Subscription, Usage

Key features:
- Automated contract negotiation for NDAs, Non-Reliance Letters, and Joinders.
- Investor obligation and credit agreement management.
- MFN automation.
- Entity management.
- DDQ automation for investor diligence questionnaires.
- Inbound KYC services.

What sets it apart:
- Purpose-built for complexity of high-stakes private markets legal workflows along the fund lifecycle, drawing from 1,000+ customer base
- Hybrid model combining purpose-built AI software and services for private markets, leveraging a vetted global network of 600+ legal professionals
- Backed by Blackstone, raised USD 325M+ total, including USD 70M in June 2025

AI Capabilities:
MCP & AI Search for fund and entity insights traceable back to source data, AI-powered contract negotiation with playbook-based markup recommendations, AI ingestion, categorization, and summarization leveraging a human in the loop for accuracy, benchmarking against precedent for contract automation, DDQs, and fund documents, AI chart generation and import for centralized entity management.

Integrations:
API-based integrations with existing firm workflows

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Private Equity List

privateequitylist.com

Sourcing | HQ: USA | Founded: 2019

Private Equity List is a lightweight investor directory that complements heavier data platforms by giving founders and smaller dealmakers accessible visibility into the PE/VC landscape.

Private Equity List positions itself as a practical tool for startups and companies to identify potential investors without relying solely on networks or expensive databases.

Target users:
Corporate M&A · Private Equity · Venture Capital · End client (sell side) · Startups · Founders

Pricing:
Mixed model – Free search functionality with possible paid tiers or services.

Key features:
- Investor directory – Database with overview and contact information for PE, VC, angel and seed investors.
- Sector and geography filters – Browse investors by industry and region.
- Stage & check size – Ability to filter by typical investment stage and check size (as implied by "find the right investment partners").
- Ancillary content – Lists of grants, incubators and accelerators in one place.

What sets it apart:
- Low-friction entry point into investor discovery.
- Coverage of grants and accelerators often missing in PE-focused tools.
- Helpful for outbound fundraising targeting.

AI Capabilities:
PEL AI, an on-site, natural-language search engine that queries Private Equity List's verified PE/VC investor database to generate filtered lists and shortlists by stage, industry, region, ticket size, and thesis.

Integrations:
Can be used alongside CRM and outreach tools.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

rogo

Rogo

rogo.ai

All | HQ: USA | Founded: 2021

Rogo is a finance-native AI platform helping bankers and investors automate research, due diligence, and document production through end-to-end agentic workflows.

Finance-native AI platform that helps bankers and investors automate research, due diligence, and document production using AI agents to execute end-to-end deal workflows and produce institutional-grade outputs.

Target users:
Investment Banking · Private Equity · Asset Management

Pricing:
Subscription

Key features:
- Felix AI agent for role-aware, autonomous deal workflows
- Document Q&A across internal & external sources
- Institutional output generation (memos, models, decks)
- Integrated financial data (S&P, FactSet, PitchBook)
- Finance-specific LLM

What sets it apart:
- Built by and for finance professionals - domain expertise is core, not bolted on
- 35,000+ users at 250+ institutions including Nomura, Truist Securities, and Baird; USD 160M Series D (~USD 2B valuation)
- Bespoke deployment model with white-glove onboarding by ex-finance professionals

AI Capabilities:
Finance-specific LLM fine-tuned on banking workflows; multi-model architecture using OpenAI, Google Gemini, and Anthropic; agentic AI (Felix) for autonomous research, report generation, and workflow execution.

Integrations:
SharePoint, Salesforce, S&P Global/Cap IQ, FactSet, PitchBook, Preqin, LSEG, SEC EDGAR, OpenAI, Google Gemini, Anthropic

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Savantiq

savantiq.ai

All | HQ: UK | Founded: 2022

Savantiq combines deep expertise in private finance and advanced technologies into an end-to-end deal management platform purpose-built for M&A and private equity.

Savantiq centralises the entire deal lifecycle, including pipeline management, execution, analysis, and reporting into a single purpose-built solution.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital

Pricing:
Quote-based pricing for private finance markets, including: Private Equity, Venture Capital and M&A. Specific pricing tiers are not publicly disclosed.

Key features:
- Full deal lifecycle management – Covers pipeline management, deal execution reporting.
- Advanced analytics – AI-driven analysis and real-time dashboards provide visibility into deal performance and pipeline.
- Integrations – Integrates with email, calendar, and data providers.

What sets it apart:
- All context in one place: No more Excel + inbox archaeology. Calls, emails, notes, news, and files are synced in real time, so nothing lives only in people's heads. This leads to significantly more proactive pipeline management.
- Increase speed of execution: Savantiq surfaces targets from your long list that best match your investment criteria and auto-builds a one-pager with custom key insights. Save substantial amounts of time in a market that is moving faster than ever before.
- Automatic pipeline visibility and project execution: Live reporting shows what's converting, where to focus, and flags risk early (e.g. top of funnel is too thin to hit Q1 goals). Steer your strategy before it's too late to react.

AI Capabilities:
Savantiq uses advanced models to support company screening, data management, and process optimisation. The platform brings pipeline management, project execution, and deal data into a single AI-powered environment.

Integrations:
Email, calendar and data providers via integrations.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

smartmerger.com

smartmerger.com smartmerger.com

All | HQ: Switzerland | Founded: 2010

smartmerger.com is the M&A operating system for an end-to-end process - data-first, EU data-sovereign, and powered by Agentic AI - trusted by leading enterprises and advisory teams, including Siemens and BCG. Gartner topranked. Designed as a modular platform of specialized apps with flexible integration, it connects structured M&A data, digital playbooks, and workflows in one secure, governed environment, spanning pipeline, diligence, integration, carve-outs, and sell-side.

smartmerger.com positions itself as the "AI-native operating system for M&A", aiming to bring together scattered M&A tools under one agentic AI-powered platform.

Target users:
Corporate M&A · M&A Advisory · Private Equity · Venture Capital · Asset Managers · End client (buy side) · Buy-side and sell-side · Law Firms · Boards, Outsourcing

Pricing:
Flexible, custom pricing - consumption-based, tokenbased, flat-rate, or value-based - tailored to scope and size, available as SaaS, on-premises, or community deployment.

Key features:
- End-to-end M&A OS: One secure workspace for pipeline, due diligence, PMI, carve-outs, sell-side, buy-side, and more, connecting workflows and stakeholders.
- App Suite & data integration: Connects apps and data into one governed environment.
- Agentic AI: Data-sovereign AI-native architecture that automates workflows and supports decision-making across the M&A lifecycle.

What sets it apart:
- Agentic AI as the core of M&A execution
- A single, secure workspace instead of scattered tools
- Full lifecycle support, including PMI and carve-outs
- Enterprise-governed: role-based access, admin shielding, approvals, auditability, and human oversight built in
- Seamless integration through the Integration Hub, REST API, and MCP

AI Capabilities:
Data-sovereign Agentic AI that operates, interacts, automates, runs, and analyzes under controlled permissions, approvals, and full auditability.

Integrations:
Integration hub connecting to other applications, data, and environments you already use – including Okta, Microsoft, deal-data providers like PitchBook, and storage providers like AWS – plus REST API and MCP for custom connections.

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Wall Street Oasis

wallstreetoasis.com

All | HQ: USA | Founded: 2006

Wall Street Oasis is a training and community hub that equips current and aspiring deal professionals with modeling skills and career insights, complementing specialized M&A software in the ecosystem.

Founded by Patrick Curtis, WSO has grown into a go-to resource for aspiring and current finance professionals seeking practical modeling skills and career guidance, widely used by people targeting investment banking, PE and similar roles.

Target users:
Corporate M&A · Investment Banking · Private Equity · Hedge Funds · Venture Capital · Asset Management · Quant & Prop Trading · Consulting · Students & Candidates

Pricing:
Mixed model – Free community and resources; self-study courses sold individually or in bundles; premium WSO Academy cohort program; corporate/B2B licensing. Pricing varies by offering.

Key features:
- WSO Academy (flagship) – Selective 12-week cohort program with 1:1 mentorship, mock interviews, and live bootcamps, backed by a job guarantee: land an elite offer or get a 100% tuition refund. Students get direct access to 100+ head mentors plus a 1,500+ mentor deep roster with global coverage (New York, London, Toronto, Hong Kong, Singapore).
- Academy results – 8,000+ publicly published mentor-session reviews (averaging ~9.5/10), with named, LinkedIn-verifiable alumni landing roles at firms like Goldman Sachs, Centerview, McKinsey, BCG, BlackRock, CPPIB, and OTPP; including many from non-target schools.
- Online community – One of the largest finance-career communities, with 1,000,000+ members, 3M+ posts, and 20M+ annual visitors.
- Free modeling series & templates – Free lessons from PE and IB professionals on financial statement modeling, DCF, M&A, LBO, and comps, plus modeling templates and extensive interview/career guides (30,000+ crowdsourced interview questions).
- WSO Courses – Self-paced premium modeling and interview-prep courses for those who prefer to learn independently.
- WSO Corporate Solutions – B2B training for firms onboarding interns, analysts, and associates.
- The Daily Peel & research – Markets newsletter plus widely cited industry and compensation reports.

What sets it apart:
- From non-target to elite offer, a proven path, whatever your starting point.
- One brand, the full journey - community, courses, and mentored Academy with a job-or-refund guarantee.
- Two decades of finance-recruiting mastery - real interview data, elite mentors, real outcomes.

AI Capabilities:
AI-powered mock recruiting interviews that replicate real-world high-finance interview scenarios across industries, roles, and difficulty levels. Candidates engage with an interactive WSO AI interviewer and receive structured feedback on technical accuracy, communication, response quality, and overall interview readiness.

Integrations:
Integrates informally into users' workflows via downloadable templates; no native software integrations are relevant.

More information on **manda.co**

More information on **fintalent.com**

SRS ACQUIOM

SRS Acquiom

srsacquiom.com

Integration | HQ: USA | Founded: 2007

SRS Acquiom is a specialized M&A services firm providing technology-enabled paying agent services, escrow administration, and shareholder representation, supporting 10,000+ transactions.

Specialized M&A services firm providing technology-enabled paying agent services, escrow administration, shareholder representation, and deal data analytics. Has supported 10,000+ transactions and works with 100% of top global law firms.

Target users:
M&A Deal Teams · Law Firms · PE/VC Firms · Shareholders

Pricing:
N/A

Key features:
- M&A payments administration with FX in 130+ currencies
- Escrow agent services (Bank of America, HSBC)
- Digital solicitation tools for shareholder consent
- Deal DashboardTM for real-time transaction monitoring
- Professional Shareholder Representative services

What sets it apart:
- Only firm offering integrated paying agent, escrow, and shareholder representation under one roof
- Proprietary Deal DashboardTM gives all parties real-time visibility into payment status, escrow balances, and milestones
- Deepest M&A transaction dataset (10,000+ deals) enabling benchmarking and market intelligence services

AI Capabilities:
N/A

Integrations:
Deal DashboardTM platform, FX payment rails in 130+ currencies, Bank of America and HSBC integrations

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

VentureLink PARTNERS

VentureLink Partners

venture-link.de

Sourcing | HQ: Germany | Founded: 2023

VentureLink Partners is a specialist recruitment and executive search firm supporting clients across M&A, Investment Banking and Transactional Risk in identifying and hiring high-calibre professionals and senior leaders.

VentureLink Partners is a specialist recruitment and executive search firm headquartered in Frankfurt am Main, supporting investment banks, M&A advisory boutiques, transactional risk firms, MGAs and law firms in hiring high-calibre professionals across M&A, Investment Banking and Transactional Risk.

Target users:
Investment Banks · M&A Advisory Boutiques · Transactional Risk Firms · MGAs and Law Firms

Pricing:
Search solutions: Contingent & retained search.

Key features:
- Recruitment in: M&A, Investment Banking, Corporate Finance, Law & Transactional Risk
- Talent placement: Connecting businesses with candidates at all seniority levels
- Extensive candidate network
- End-to-end recruitment support
- Search solutions: Contingent & retained search

What sets it apart:
- Deep M&A expertise: In-depth understanding of the M&A ecosystem
- Boutique approach: Relationship-led and highly personal
- Cross-market expertise: Identifies candidates beyond traditional talent pools
- Senior-level involvement: Direct involvement throughout the search process
- Discreet engagement: Confidential and targeted candidate approach
- Tailored search: Individual and highly customized recruitment process

AI Capabilities:
VentureLink leverages AI-supported sourcing and data-driven research to enhance market mapping and candidate identification while maintaining a highly personal, relationship-driven approach to recruitment.

Integrations:
N/A

More information on **manda.co**

More information on **fintalent.com**

✓ Verified by vendor

Wyecliff

Wyecliff.ai

wyecliff.ai

All | HQ: USA | Founded: 2025

Wyecliff.ai is a custom software and AI automation consultancy designing bespoke automation systems and AI agents for traditional industries.

Custom software and AI automation consultancy designing bespoke automation systems, AI agents, and workflow integrations for traditional industries - not a dedicated M&A software product.

Target users:
SMBs · Construction · HVAC · Home Health · Manufacturing

Pricing:
On request.

Key features:
- Contract risk analysis AI
- Proposal writing assistant
- Operations control center for multi-company tracking
- Custom AI agent deployment
- Workflow automation and overhead reduction systems

What sets it apart:
- Fully custom solutions - no generic SaaS; purpose-built per client engagement
- ROI-first positioning: average USD 136K annual savings cited across sample use cases
- Serves traditional/non-tech industries often overlooked by SaaS vendors

AI Capabilities:
Custom AI agents for contract review, proposal generation, and workflow automation; built on modern LLM infrastructure tailored to each client's processes.

Integrations:
Client-specific; builds integrations as needed for each engagement

More information on **manda.co**

More information on **fintalent.com**

Outlook 2027

What we will be writing about next year

Agentic workflows that run entire diligence checklists. Consolidation among data rooms and sourcing engines. The first measurable evidence of AI's impact on deal outcomes - beyond vendor claims. And an integration chapter that will no longer be the smallest in this book.

The 2027 edition will be launched at the M&A Excellence Days 2027. Vendors can verify and update their entries year-round via their tool page, and every reader nomination is reviewed by the editorial team.

Index A–Z (all tools)

4Degrees 73
Abrams 42
Acquire.com, Inc. 16
Admincontrol 98
Affinity 74
Airtable 75
Akamai 189
AlphaSense 139
AnalyzeMarkets 43
Ansarada 99
ARC Intelligence 44
arx 76
Asana 77
Atlassian 78
Axial 17
Backwell Tech Corp Europe 18
Bankers Deals 19
BeesWall GmbH 190
Black Duck 140
Blackroom 100
Bloomberg 45
Blue Flame 203
Boomi 191
Boopos 20
Box 101
Brainloop 102
Caena 21
Caplinked 103
CB Insights 41
Circle Square 204
Claira 141
Clinked 104
CodeDD 135
Comparables 46
conclusia 22
Concord 142
coresignal 47
Corporate Finance Institute 205
Crunchbase 48
Cyclr 192
Cyndx 206
Datarade 49
Datarails 173
DataRooms 105
Datasite 95
DataroomX 106
DEALCIRCLE 23
Deale 24
DealRoom 107
Dealroom co 50
DealSage 143
DealStream 25
Dealsuite 13
DealVDR 108
Devensoft 193
DFIN Venue 109
Digify 110
Diligent 144
DocSend 111
DocuSign 145
Domo 51
Drooms 112
DUB Deutsche Unternehmerbörse 26
Dynamics 365 80
Dynamo 207
eBrevia 146
eFinancialCareers 208
EKNOW 71
EMIS 52
Empire Flippers 27
ENTRX 28
Epiq VDR 114
equimatch.ai 29
EthosData 115
Experteer 209
F2 148
FactSet 53
filerskeepers 149
Fintalent 201
Fintalo 210
Firmex 116
FirmRoom 117
Flippa 211
FORDATA 118
Full Stack Modeller 175
Gain 54
Google Drive 119
Grasp AI 55
GrowthPal 31
Hebbia 150
HighQ 120
HumanaQ 187
Ideals VDR 96
idgard 121
Imprima 122
Inex One 56
Intapp DealCloud 79
Inven 14
Kamzan 124
Keye 151
Kira by Litera 136
Kona Equity 57
Lawtech Group 212
Legalian 152
Leverest 202
Lexcel 153
LexisNexis 154
Libra by Wolters Kluwer 137
LocateRisk 138
LoopNet 213
loyos 176
Lucanet 177
M&A Accelerator 214
M&A Deal Platform 215
MADiscover 32
mar:lean 174
Marveri 155
Mergermarket 58
MergerWare 72
Mergr 59
Metal AI 156
MichaelPage 216
Midaxo 217
Model ML 178
Modelyzr 60
Monday.com 81
MoneySoft 179
Mosaia 82
Multipartner 125
Navatar 83
Navima.io 218
netfiles 97
Onehub 126
Ontra 219
Orbis 61
outreach 84
Palturai 62
PandaDoc 157
PATEV 180
People Impact Analytics 188
PerceiveNow 158
PinpointAI 159
Pipedrive 85
pipeline 86
PitchBook 63
Planful 181
Preqin 64
Private Equity List 220

PrivSource 65
Progress Sharefile 127
ProxDeal 33
Qmarkets Q-Scout 87
QuikIRR 182
Rapid7 160
Revver 113
RIA Catalyst 88
Rogo 221
S&P Global Market Intelligence 66
SAP LeanIX 194
Savantiq 222
Sc0red 89
Scend 90
SDD Historia 195
SecureDocs 128
Sema 161
ShareVault 129
Shibumi 196
Shortcut ai 162
smartmerger.com 223
SmartRoom 130
Smartsheet MA 197
SMASHDOCs 163
SNP Group 198
SourceCo 34
Sourcescrub 35
SRS Acquiom 225
SS&C Intralinks 123
stabwechsel 36
Sterling 131
StrategyBridgeAI 67
Tiger Team M&A 91
TopLegal 164
TotIIQ 165
Tower 166
Tracxn 68
transact.digital 37
TuringText 167
Valuadder 183
Valutico 184
Valu8 by Grata 30
Vault Rooms 132
Vencortex 168
VentureIQ 15
VentureLink Partners 226
Virtual Vaults 133
Vitelis 169
Wall Street Oasis 224
WebsiteClosers 38
Wokelo 170
Workday Contract Intelligence 147
Wrike 92
Wyecliff.ai 227
Zscaler 199
Zuva 171

M&A REVIEW

M&A Tools & Solutions Handbook 2026
Special Edition of M&A REVIEW · Volume 37 · Published 9/2026
www.ma-review.de

Published by **mandaco** · M&A Media Services GmbH · Habenschadenstr. 16, 82049 Pullach, Germany · kontakt@ma-review.com · www.manda.co
fintalent.com · Fintalent Ltd. · 167–169 Great Portland Street, 5th Floor, London W1W 5PF, United Kingdom · www.fintalent.com

Publishing house M&A Media Services GmbH, Pullach · Managing Director: Stefan Schneider · Mobile +49 155 624 39589 · www.ma-review.de

Responsible for content Stefan Schneider, address as above

Editors, M&A REVIEW Prof. Dr. Christoph Schalast, Frankfurt School of Finance & Management · Prof. Dr. Florian Bauer, University of Bristol Business School

Editorial staff M&A Media Services GmbH · Carolin Reiter, COO · carolin.reiter@manda.co

Research partners The fintalent.com network, together with M&A Science · Working Group on Digitalisation of the Bundesverband Mergers & Acquisitions gem. e.V. (Head: Prof. Dr. Karl Popp) · mandaco / M&A REVIEW editorial research

Publication organ Bundesverband M&A gem. e.V. c/o M&A Media Services GmbH · Habenschadenstr. 16, 82049 Pullach · info@bm-a.de · www.bm-a.de · Chairman of the Board: Jan Pörschmann

Availability The ePaper is fully linked and is updated between editions. Printed special editions follow the event calendar, starting with the M&A Excellence Days 2027, and are available on demand.

Editorial independence Inclusion is editorial and free of charge. No listing can be bought, and no tool is ranked or scored. Entries are based on vendor statements and public information as of the editorial deadline in September 2026. Every vendor was invited to review its own entry. Errors and omissions excepted.

Trademarks & images Product names, logos and trademarks are the property of their respective owners and are used for identification only. Header images and logos on tool pages were supplied by the vendors.

External links This ePaper links to vendor websites and to tool-pages on manda.co and fintalent.com. The operators of external websites are solely responsible for their content.

Liability Articles, recommendations and tables are based on sources the editorial team considers reliable. However, no guarantee of accuracy can be given.

Copyright © 2026 M&A Media Services GmbH, Pullach. Contributions by Fintalent Ltd. © Fintalent Ltd. Guest views © the respective authors. All rights reserved, including translation. Reproduction, inclusion in electronic databases or publication online, in whole or in part, requires the written permission of the publishers.

Cover Generated with Adobe Firefly

Layout & realization ht.design.marketing · Schulstraße 17, 17194 Moltzow · www.ht-design-marketing.de

Printing Joh. Walch GmbH & Co. KG · Im Gries 6, 86179 Augsburg

Data protection The privacy policy of M&A Media Services GmbH applies: www.ma-review.de/datenschutz

Use of AI Generative AI tools support our editorial work and were used to create illustrations and the cover. Purely synthetic or AI-edited images are labelled next to the image or in the image credits. All texts were reviewed, edited and verified by the editorial team before publication.

STAY TUNED



The M&A AWARD UK is coming soon.