

Powering Private Markets

AI-Driven Capital Deployment



InvestorFlow's Capital Deployment Application

We built our Capital Deployment solution specifically for deal teams in private markets — so it fits how you source, assess, and run deals in every asset class — from the KPIs to the individual workflows. InvestorFlow connects your inbox, pipeline, and market data and uses AI to surface the right deals faster — with zero disruption to how you already work — bringing your proprietary data and your teams on to a common enterprise-class platform.

Bespoke Asset Class Workflows



AI-Powered Capabilities

- **AI-extracted financial metrics** flow directly from your inbox into fund-level dashboards — one large PE client saw a **10x increase** in the volume of data entered into the system.
- **AI-powered Actionable Quarter** surfaces the best time to engage each target based on interaction data and extracted signals. A client from our early access program saw a **15x increase** in the number of compelling events detected around investment opportunities.
- **Company 360** auto-generates up-to-date profiles by synthesizing emails, meetings, and historical CRM data removing administrative drudgery and **increasing deal flow by as much as 7x** which was the experience of one of our large private credit clients.

Built On

BUILT ON



USING



ENHANCED BY



Private Equity

Structure and Scale your Pipeline

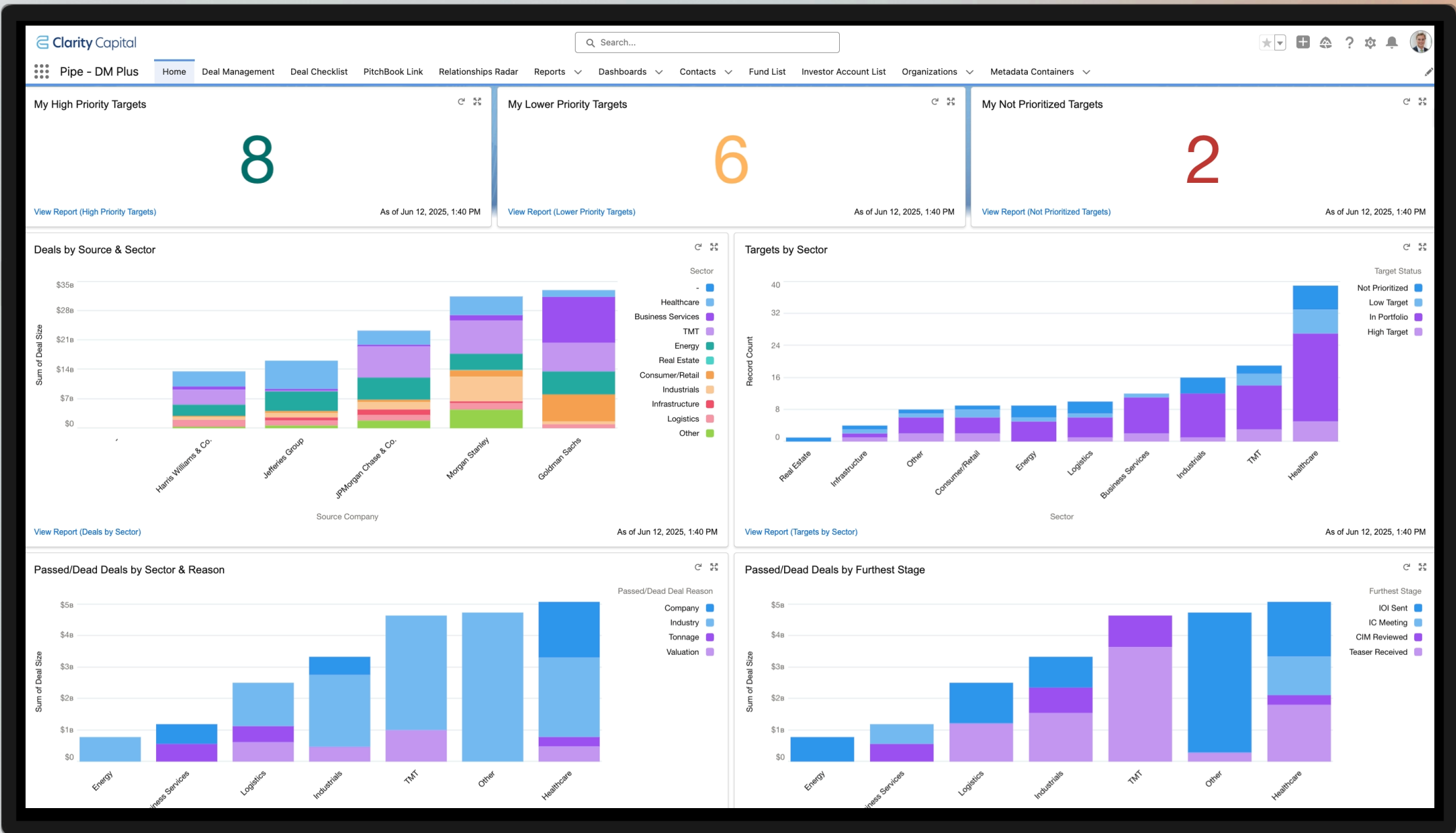
Gain full visibility into your deal flow by tracking opportunities across sector, region, and strategy — clearly segmented by stage, source, and relationship owner.

Focus on Fund-Level ROI

Tag deals to specific funds, attribute sourcing, and assess pipeline quality against return targets and fund mandates to make more strategic investment decisions.

Confidently Manage Co-Investments

Streamline co-investment workflows by tracking LP interest, managing allocations, and securely sharing data — all from a platform built for compliance and speed.



Private Credit

Structure Credit Deals with Precision

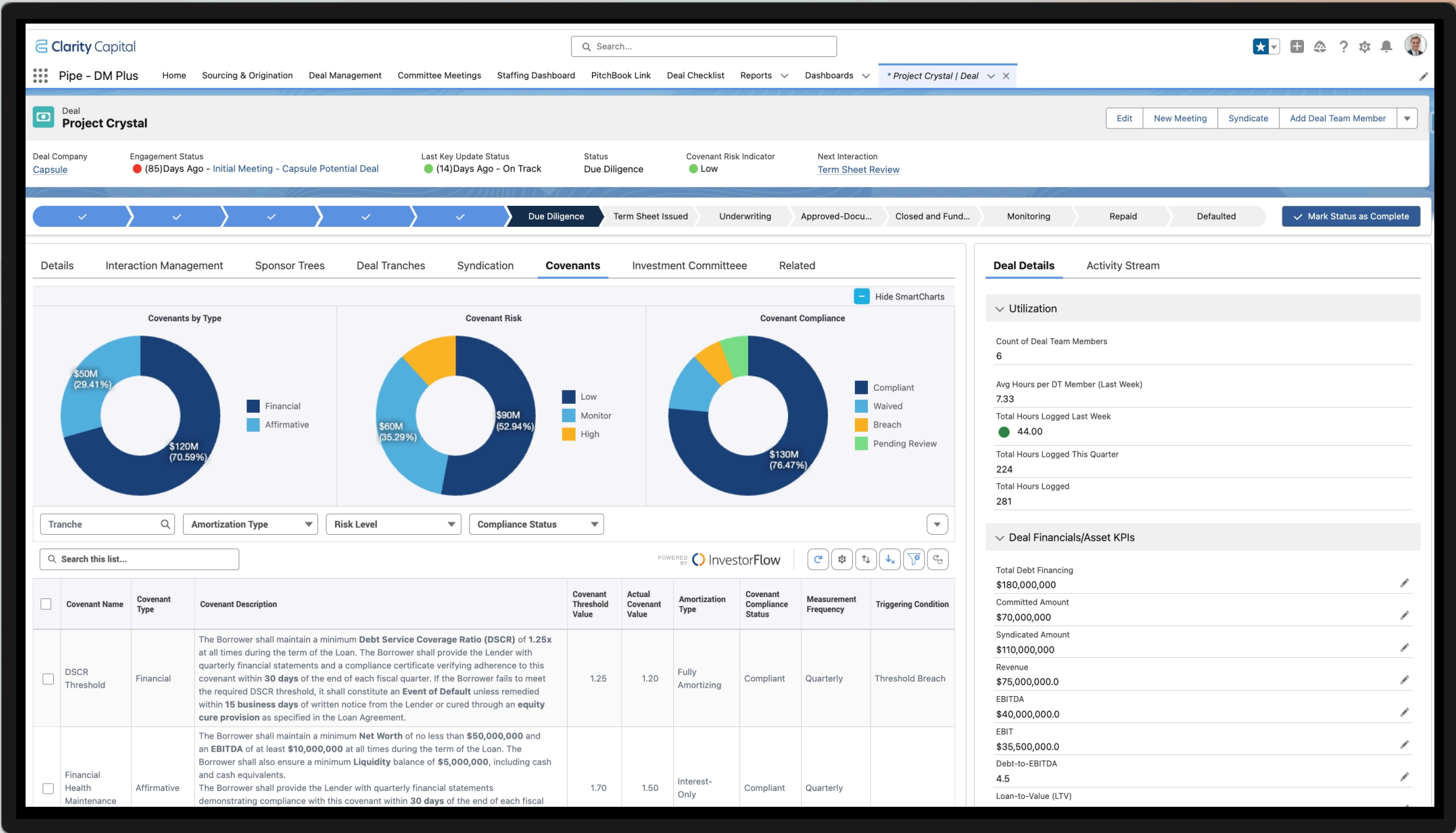
Accurately manage loans, terms, covenants, and collateral to maintain control and transparency throughout the credit lifecycle.

Automate Deal Screening and Routing

Streamline intake by automatically assigning opportunities to the appropriate credit team based on deal characteristics like loan size, tranche, term, complexity, covenants and collateral.

Actively Monitor Credit Risk

Connect deployment with servicing and asset management tools to track ongoing exposure, enforce covenant compliance, and proactively manage risk.



Real Estate

Evaluate at the Property Level

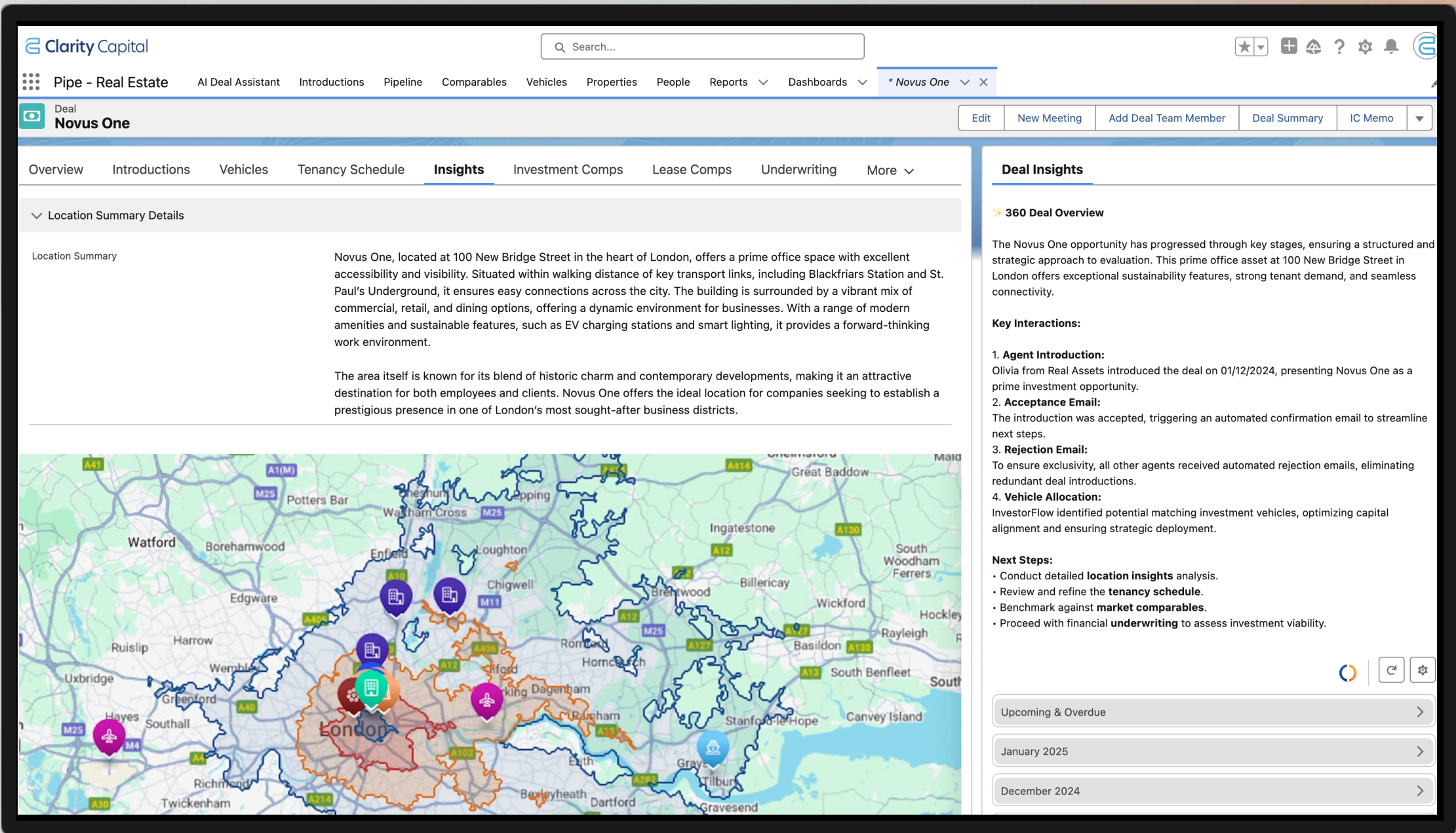
Support acquisition, development, and recap strategies with deal tracking tailored to individual properties.

Bring Context to Every Decision

Integrate comps, maps, and market data directly into the deal workflow to ensure data-driven evaluations and maintain a clear audit trail.

Ensure Seamless Team Alignment

Connect investment and asset management teams for smoother handoffs post-close and faster execution on value creation plans.



Infrastructure

Precisely Track Long-Horizon Investments

Manage diligence processes and multi-year, phased capital deployment with tools built for complex, time-intensive infrastructure deals.

Collaborate Across Stakeholder Networks

Maintain visibility into relationships and interactions with government agencies, local partners, and co-investors to streamline coordination.

Make Context-Informed Decisions

Integrate comps, maps, and market data directly into your workflow to evaluate opportunities with full market context and a transparent audit trail.

The screenshot displays the Clarity Capital InvestorFlow application interface for the 'Colombo Data Centre' deal. The top navigation bar includes a search bar and various menu items like 'Pipe - Real Estate', 'AI Deal Assistant', 'Introductions', 'Pipeline', 'Comparables', 'Vehicles', 'Properties', 'People', 'Reports', 'Dashboards', and 'InvestorFlow Setup'. The deal name 'Colombo Data Centre' is prominently displayed, along with its status 'Pipe PLUS - Unprocessed' and engagement status '(7)Days Ago - Internal Review'. A progress bar shows the deal's stage: 'Under Consideration' (active), 'Bid Placed', 'Under Offer', 'Exchanged', and 'Completed'. The main content area is divided into sections: 'Overview' (with a summary of the deal), 'Introductions', 'Vehicles', 'Property Intelligence', 'Underwriting', 'Due Diligence', 'Interactions', 'Deal Team', and 'Files'. The 'Overview' section features a large image of the data center and a detailed description: 'This is a build-to-suit data center sits on nearly 30 acres in Columbus, Ohio a rapidly growing strategic gateway between the Midwest and East Coast. Purpose-built for enterprise IT, it has been occupied by IBM and now Kyndryl for over 25 years, demonstrating proven long-term value. The facility features robust infrastructure, including dual 13.2KV utility feeds with automatic transfer switches, and over 2 MW of UPS-supported capacity. Cooling systems are designed for high-density environments with N+1 redundancy in chillers and cooling towers, automated humidification system.' The right sidebar contains a 'PDF Viewer', 'Activity Stream', and 'Deal Insights' section. The 'Deal Insights' section highlights key opportunities: 1. Favorable IRR & Equity Returns, 2. Prime Location with Strong Tenant Demand, 3. No Flood Risk & Strong Asset Resilience, 4. Premium Lease Comps & Market Growth, and 5. Sustainable Design & ESG Premium.

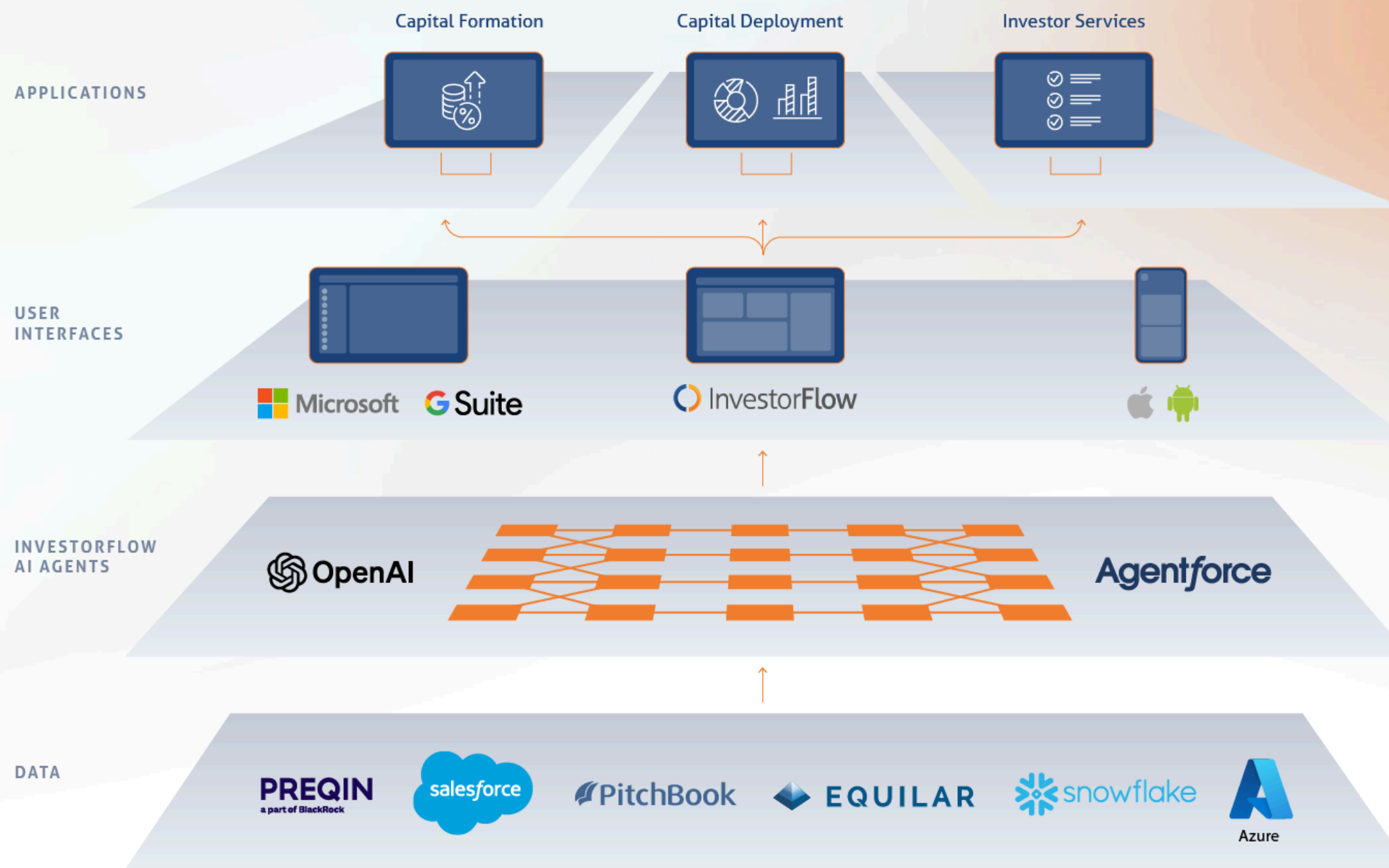


Powering Private Markets

Capital Deployment Application Highlights

An Enterprise-Class AI and Application Architecture


Our Capital Deployment application **brings applied AI to the front office** — built for scale and tailored to how real deal teams work across private equity, private credit, and real estate. It connects your inbox, pipeline, and market data in one integrated application, automatically capturing the key metrics, timelines, and workflows unique to each asset class — so you can **surface and close the right deals faster, without changing how you work.**




InvestorFlow AI Email Assistant

Extract and Save Updates to Firm Database Directly from your Inbox


Identifies and links companies, contacts, and funds from meeting notes and emails to firm records to ensure accurate firm data without manual entry.




Auto identify & extract from emails and notes




Employees/contacts



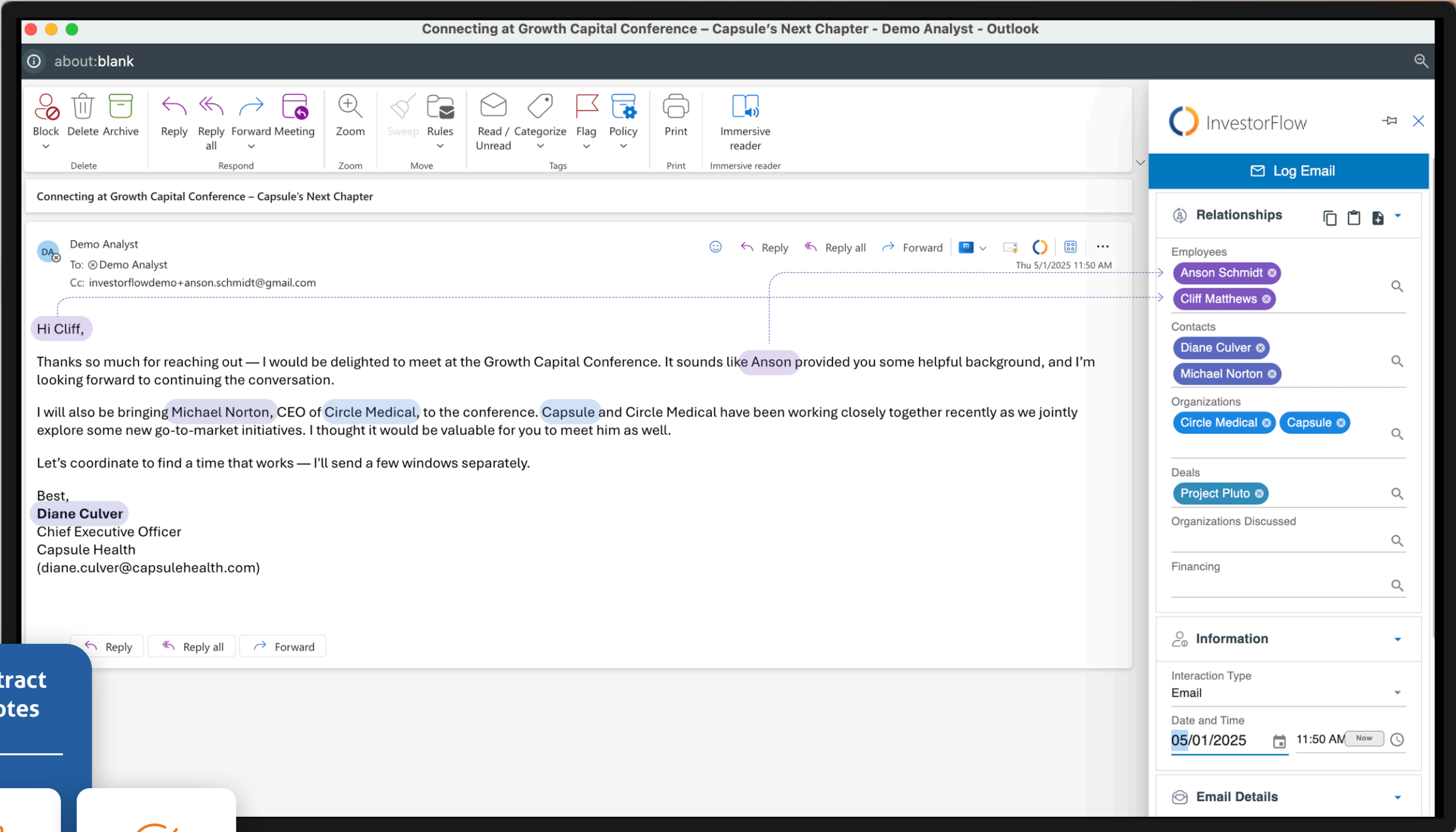
Organizations




Deals/funds



More



The screenshot displays an Outlook email client window titled "Connecting at Growth Capital Conference – Capsule's Next Chapter - Demo Analyst - Outlook". The email is from "Demo Analyst" to "Demo Analyst" with a Cc of "investorflowdemo+anson.schmidt@gmail.com". The email content includes a greeting "Hi Cliff," and a paragraph about meeting at the Growth Capital Conference. The email is dated "Thu 5/1/2025 11:50 AM". The InvestorFlow AI interface is overlaid on the right side of the Outlook window, showing a "Log Email" button and a "Relationships" section with a list of contacts and organizations. The "Relationships" section includes a search bar and a list of contacts: "Anson Schmidt", "Cliff Matthews", "Diane Culver", and "Michael Norton". It also includes a list of organizations: "Circle Medical" and "Capsule". The "Information" section shows the "Interaction Type" as "Email" and the "Date and Time" as "05/01/2025 11:50 AM".

 POWERING PRIVATE MARKETS

AI-Populated Deal Summaries

Up-to-date Profiles Including Key Details Extracted from Meeting Notes

Enhance deal records to include investor preferences, financial KPIs, and key themes from meetings for better decision making.



Investor

Compelling Events

Financial Metrics

Clarity Capital

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Pipe - DM Plus

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Related List Quick Links

Contacts (6)

Interactions (10+)

Deals (2)

Notes & Next Step History (5)

Details

Contact Management

Interaction Management

Deal Management

Relationship Radar

Link For Pitchbook

Organization Details

Organization Name	Capsule	Primary Coverage	Cliff Matthews
Short Name	Capsule Health	Founded	2005
Sector	TMT	Employees	212
Target Priority	In Portfolio	FTE CAGR	13%

Description Information

Next Conference	Growth Capital Conference
Latest Deal	Project Pulse
Description	Operator of a digital pharmacy platform built to facilitate the delivery of prescription medication. T company's platform accepts prescriptions from the doctor as well as allows patients to switch a re their old pharmacy to the platform, enabling users to get their medication delivered on the same d hour window. Targeting for an investment from Partners II; we considered an investment in 2018, but the compar small at the time.

Financial Details

Annual Revenue	\$75,000,000	TEV	\$375,000,000
EBITDA	\$22,500,000	Direct Equity	\$75,000,000
EBIT	\$15,750,000	Total Equity	\$75,000,000

Co-Investment Preferences

Activity Stream

Company Insights

Relationship Insights

Overall Relationship Indicator

Overall Account Relationship Strength

Strong

No of Executives - Strong

2

No of Non Executives - Strong

0

Insights

Insight Summary

Fundraise likely Q2 2025

AI Summary

Latest Insights:

- Fundraise likely Q2 2025
- \$75M revenue reported 2024
- \$90M revenue projected 2025

Engagement history trend and sentiment:

Long history of interactions overall positive positive, focusing on potential investment opportunities and detailed financial reviews.

Engagement history key points:

Capsule is partnering with Circle Medical reporting good traction with combined solution. Previous discussions on digital health platform growth, pivot from ai model training to medical diagnosis. Facing regulatory changes, and operational risks.

Relationship status:

Active engagement with ongoing discussions about potential investments and financial reviews. Anson Schmidt is most active in relationship.

Alignment opportunities:

Potential investment in Capsule, a high-growth company. New opportunities in the digital health market with Capsule's pivot from pure tech using their innovative imaging analysis platform.

Tailored proposals next steps:

Schedule follow-up calls to discuss valuation changes and updated diligence materials. Review final diligence and draft LOI for Project Pulse.

Risks to mitigate:

Regulatory risks related to digital health platforms. Operational risks related to medication delivery. Financial risks related to fundraising and capital management. Inconsistent engagement history.

AI-Surfaced Actionable Quarter Deals

Automatically Detect Important Events

InvestorFlow AI will detect critical events like fundraising, exit events, and market movements from meeting notes and third-party data to facilitate the timely identification of deal opportunities and changing investor interests.

Clarity Capital

Pipe - DM Plus

Home

Deal Management

PitchBook Link

Flexlist Management

Reports

Dashboards

Prospects

Intermediaries

Contacts

Deal Pipeline

Engagement Status

Target Status

Sector

Region

My Coverage

Exclude No

Search this list...

Organization Name	Relationship Indicator	Latest Insight	AI - Actionable Quarter Explanation
<input type="checkbox"/> Techtonix	<div></div>	- Actionable Quarter: Q [View Details]	Carve out opportunity from Capsule
<input type="checkbox"/> Accuity Delivery Systems	<div></div>	- Actionable Quarter: Q1 2025 [View Details]	considering an acquisition Q1 2025
<input type="checkbox"/> Shiloh Industries	<div></div>	- Actionable Quarter: Q1 2025 [View Details]	fundraising Q1 2025
<input type="checkbox"/> MRI Software	<div></div>		
<input type="checkbox"/> DataRobot	<div></div>	- Actionable Quarter: Q [View Details]	
<input type="checkbox"/> 30th Street Animal Hospital	<div></div>	- Actionable Quarter: Q4 2025 [View Details]	exit Q4 2025
	<div></div>	- Actionable Quarter: Q0 2026 [View Details]	share sale 2026
	<div></div>	- Actionable Quarter: Q0 2024 [View Details]	fundraise 2024
	<div></div>	- Actionable Quarter: Q0 2026 [View Details]	planning an IPO 2026

Latest Insight

- Actionable Quarter: Q4 2026 [View Details]

- Actionable Quarter: Q4 2024 [View Details]

- Actionable Quarter: Q3 2025 [View Details]

Primary Coverage

Coleman Steigerv

Cole Steigerwald

Coleman Steigerv

Coleman Steigerv

Cole Steigerwald

Cole Steigerwald

Cole Steigerwald

Cole Steigerwald

Latest insights

Fundraising

Exits

Market movements

Relationship Intelligence & Warm Introductions

Identify & Maximize Firm Relationships

Identify pre-existing relationships within the firm to minimize cold outreach and maximize effective outreach using warm introductions sourced from internal connections.

**Relationship Radar**

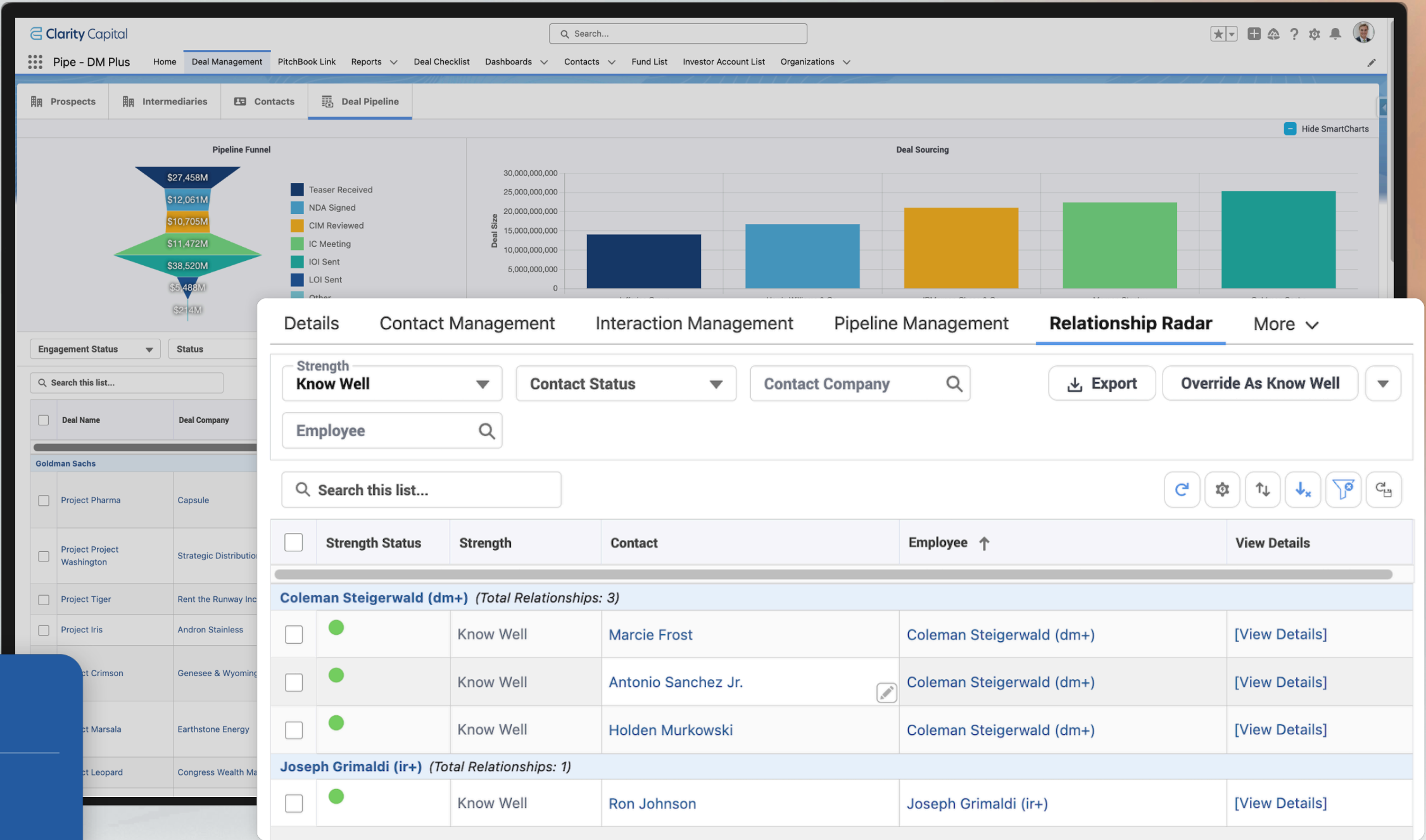
TOP 3 RELATIONSHIPS

 Cole Steigerwald

 Marcie Frost
Know well

 Antonio Sanchez
Know well

 Holden Murkowski
Know well





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