

# Fintech Intelligence Service

IHS Markit Security Technologies team

Service overview  
March 2019

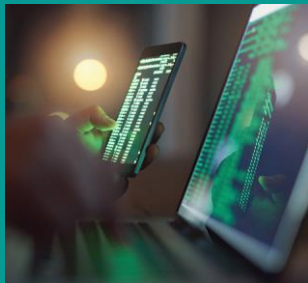
# Why IHS Markit research?



**Extensive vertical market experience and expertise covering sectors such as:** Financial, power and energy, telecoms, advertising and media, supply chain and logistics, healthcare, etc.



**We serve over 3,500 of the largest institutional customers in the world,** including banks, hedge funds, asset managers, central banks, regulators, auditors, fund administrators and insurance companies – enhancing transparency, reducing risk and improving operational efficiency.

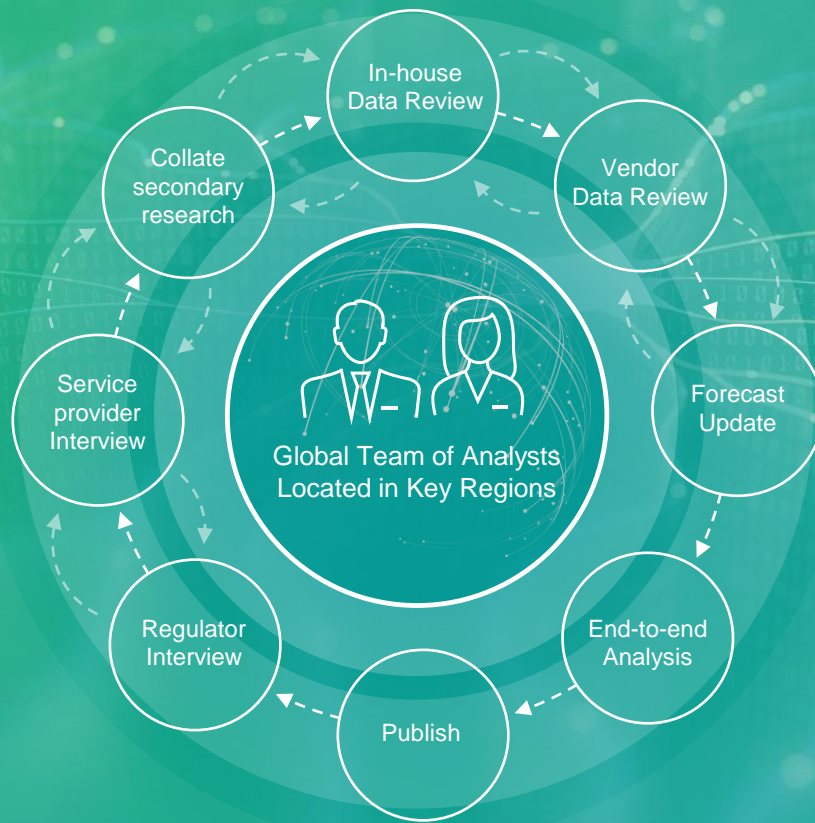


**Strong industry networks, primary research and forecasts to 2030: A significant amount of primary research (40-50 interviews) was done for the “Blockchain Vertical Opportunities Report – 2018.” This included companies like IBM, World Economic Forum, Bosch, Polymath, Dash, blockchain and ICO startups and internal IHS Markit interviews with vertical industry SMEs.**

IHS Markit Technology research is supported by the industry’s largest team of analysts and provides unrivalled depth, breadth and expertise.  
**All of our analyst focus 100% on Fintech & Blockchain.**

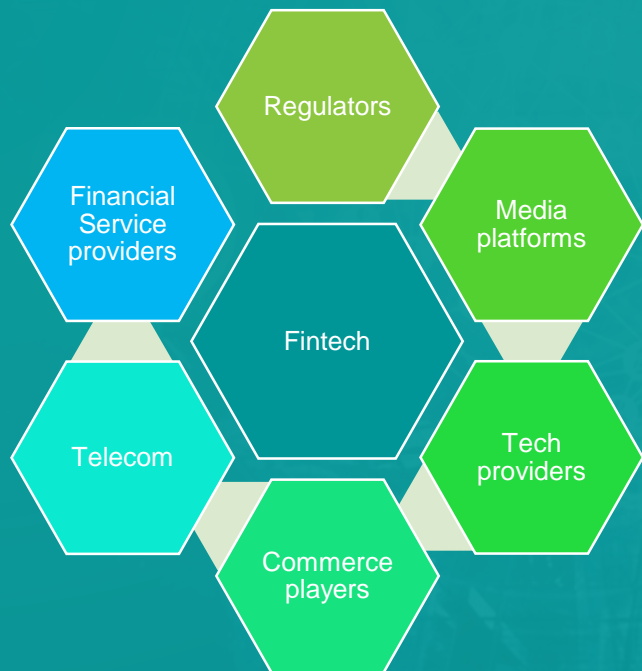
# Methodology

- 200+ interviews per year
- Lead analysts conduct primary research interviews for Fintech and Blockchain players.
- Develop analyses based on supply chain readiness
- Keep information current and forward-looking with frequent updates





# Fintech is attracting more attention...



## Questions from existing clients

- What blockchain means for financial services? How to save costs?
- What will be the impact of start-ups such as Monzo and Revolut for banking services?
- What's next for fintech? Which area is growing? Digital payments or lending?
- How can fintech start-ups monetise? Business model, customer adoption strategies...
- How can traditional financial services keep up with the fintech disruption?
- How can telecom develop fintech related service to expand current business model?

## Why is IHS Markit in a strong position for producing Fintech research?

Serving 50,000+ customers in 140+ countries including...

**>80%**

of the Fortune  
Global 500

**49/50**

Largest  
US banks

**>75%**

of the Fortune  
US 1000

**10/10**

Largest automobile  
companies in the world

**94/100**

Largest US  
corporates

**49/50**

Largest global oil  
companies

**ALL**

Global  
investment banks  
(14/14)

Largest  
hedge funds  
(50/50)

Largest  
global asset  
managers  
(50/50)

Largest  
global custodians  
(10/10)

G20  
governments  
(20/20)

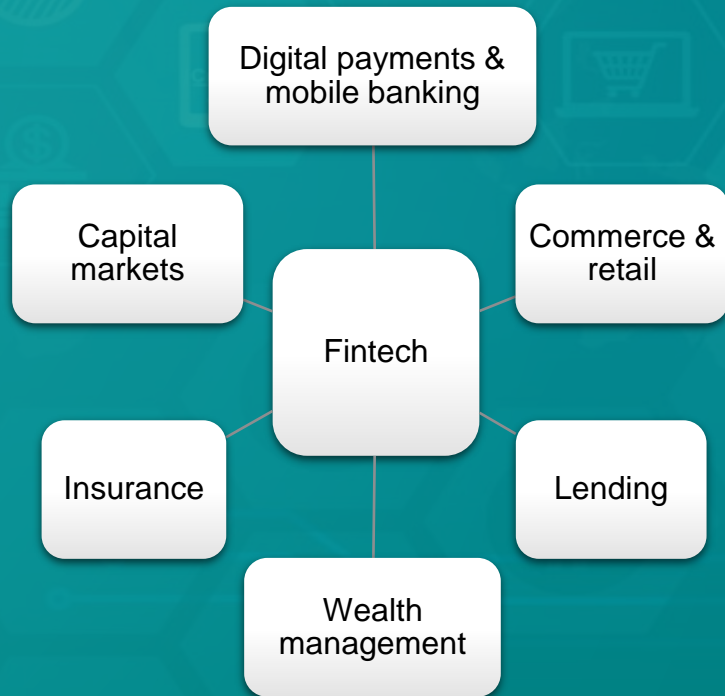
## Our fintech research coverage

### Six key subtopics covered from three perspectives

Technology perspective:  
AI, Blockchain, Cloud

Consumer perspective:  
Banking/payments

Vendors perspective:  
Top Fintech companies



## Our fintech research coverage

### A closer look of the technology perspective

Technology perspective:  
AI, Blockchain, Cloud



#### What's covered

Analysis will focus on new tech's impact on financial companies:

- AI
- Blockchain
- Cloud

Deliverables:

- Reports (inc market forecast)

#### Who will benefit

**Financial institutions** plan to adopt new tech

- Internally: how to adopt new techs to cut costs?
- Externally: how to innovate and bring in new revenues?

**Tech providers** look for competitive analysis in current or new markets

**Regulators**



## Technology perspective deliverables: AI, Blockchain, Cloud

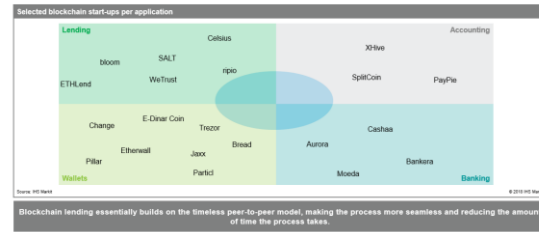
### Blockchain in Finance Report – 2019

#### In this report:

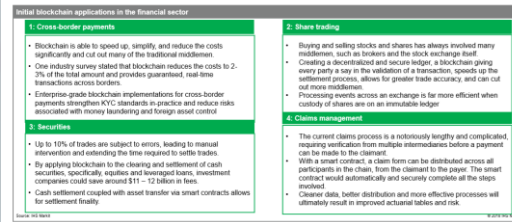
This report examines the global market for blockchain in the financial sector. It provides a current snapshot of this market and examines the factors that are projected to hinder or drive growth of the blockchain market from 2017 to 2030

- Blockchain is increasingly penetrating the financial services industry
- Blockchain to disrupt financial industry
- Blockchain applications for the financial sector
- The financial market for blockchain – Forecasts
- Mapping blockchain initiatives – Financial
- Digital assets of blockchain technology
- Cryptocurrencies market at a glance
- Mineable cryptocurrency
- Non-mineable / pre-mined cryptocurrency
- Utility tokens
- Security tokens
- Regulation

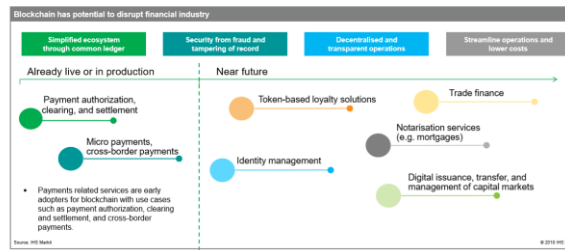
#### Mapping blockchain initiatives - Financial



#### Blockchain applications for the financial sector



#### Blockchain has the potential to disrupt financial industry; payments related solutions are early adopters



## What's next?

AI in banking report - 2019  
(Mar 2019)

Cloud in finance report - 2019  
(Jul 2019)



## Our fintech research coverage

### A closer look of the consumer perspective

Consumer perspective:  
Banking/payments



#### What's covered

Detailed consumer data across  
65+ countries globally:

- Banking cards data
- Device-based payments data
- Lending & insurance penetration (2<sup>nd</sup> half 2019)

Deliverables:

- Power BI
- Excel pivot
- Reports (customer trends)

#### Who will benefit

**TMT players** plan to offer  
financial related services

**Financial institutions** plan to  
launch new services in current or  
new markets

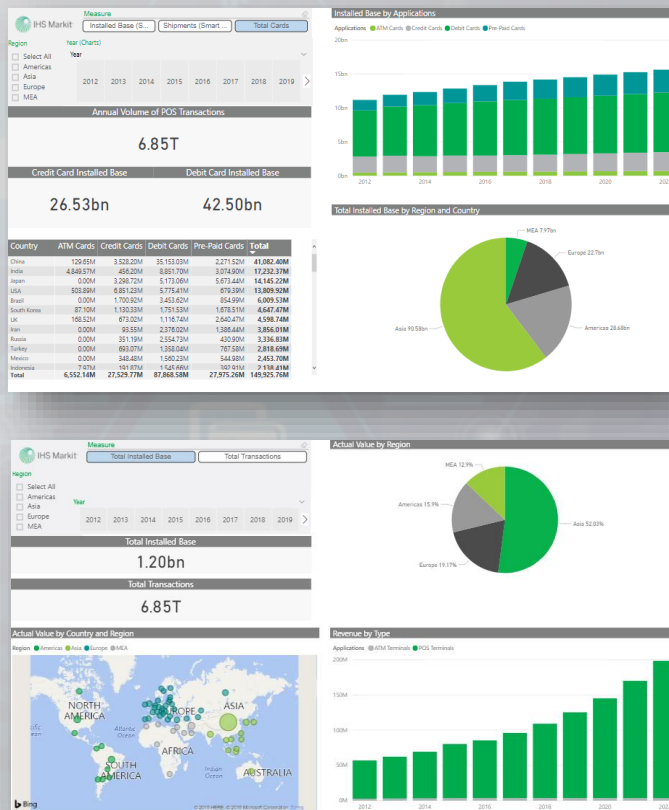
**Regulators**

## Consumer perspective database: Banking/payments

Payment and banking card data across  
65+ countries globally

- Credit card penetration
- Debit card penetration
- Prepaid card penetration
- POS and ATM terminal data
- POS transaction data
- Device-based payments data (Apple, Samsung and Google Pay)

Note: deliverables are available in both  
Power BI and Excel Pivot formats.



## What's next?

- Data update for existing database (2<sup>nd</sup> half 2019)
- Add lending penetration (2<sup>nd</sup> half 2019)
- Add insurance penetration (2<sup>nd</sup> half 2019)

## Deliverables

- Power BI
- Excel Pivot

**Other potential deliverables**  
**Infographic** for fintech ecosystems in major countries (including device-based payments, payments cards, ATM/POS penetration etc.)

## Our fintech research coverage

### A closer look of the consumer perspective

Vendors perspective:  
Top Fintech companies



#### What's covered

Continuous coverage of the top 250 fintech companies

- List of top 250 fintech players
- Top 250 fintech funding
- Top 250 fintech revenue

Other potential areas:

- Fintech scorecard
- Challenger banks scorecard

#### Who will benefit

**TMT players** plan to offer financial related services

**Financial institutions** want to track the development of top fintech players

**Regulators**

## Vendor perspective database: Top Fintech companies

**Fintech Top 250 Database:** Continuous coverage of the top 250 fintech companies, historical data for investors and funding, as well as forecasts for revenue, market share, and ranking across seven fintech categories. Detailed company profile/analysis can be requested through custom projects.



## What's next?

- Data update for existing database (Q1 2020)

## Deliverables

- Power BI
- Excel Pivot

Other potential areas:

- Fintech scorecard (2<sup>nd</sup> half 2019)
- Challenger banks scorecard (2<sup>nd</sup> half 2019)

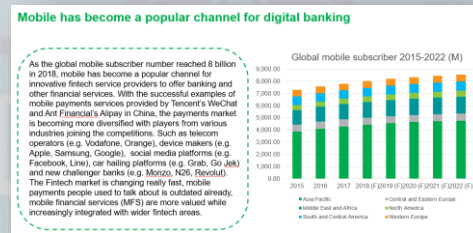
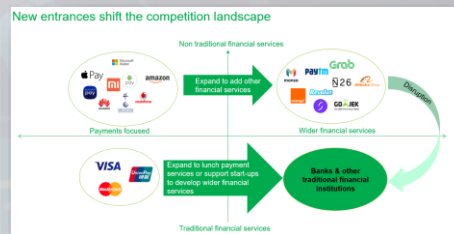


## Overview report: Fintech trends 2019

Fintech global trends 2019:  
Challenger banks and new technologies to shift the competition landscape

### In this report:

- Fintech trends summary in 2018
- Opportunities in both developed and emerging markets
- Mobile has become a popular channel for digital banking
- Car hailing platforms and challenger banks intensify payments war
- Apple, Samsung and Google Pay global expansion by the end of 2018
- New entrances shift the competition landscape
- Fintech funding trends
- Fintech revenue trends
- Fintech trends in 2019
- Challenger banks to disrupt traditional banking services
- AI driven value-added banking services
- Voice, the next channel for consumer financial services



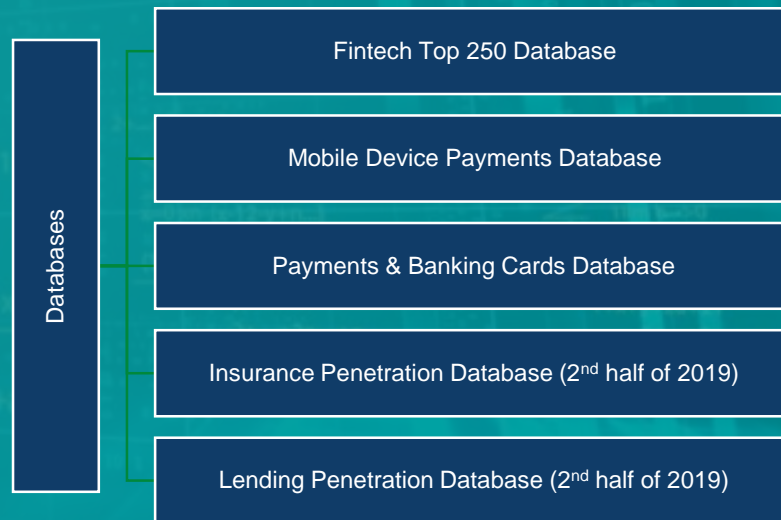
## What's next?

Fintech trends report –  
2020 (Q1 2020)



## Market database & forecasts

- Historic, current and forecasted data delivered in Power BI
- Fintech ecosystem: Quarterly updated interactive fintech ecosystem data on Power BI platform which gives an overview of fintech ecosystem by country, including fintech funding and M&A value, mobile payments penetration, banking penetration, loan and insurance penetration, as well as top fintech companies by country by region.
- Fintech company tracker: Continuous coverage of top 250 fintech companies, historical data and forecast for revenue, market share as well as ranking.
- Fintech market share: Global, regional/ country-level, by product type and technology for 65 market share tables



## 2019 roadmap of deliverables: Fintech Intelligence Service

Fintech database	Cadence	Q1 2019	Q2 2019	Q3 2019	Q4 2019
Payments & Banking Cards Database - 2019	Once a year	Mar 2019			
Mobile Device Payments Database- Update H1 2019	Twice a year	Mar 2019		Jul 2019	
Fintech Top 250 Database - 2019	Once a year	Mar 2019			
Lending Penetration Database - 2019	Once a year			Aug 2019	
Insurance Penetration Database - 2019	Once a year			Aug 2019	

Fintech reports/insights	Type	Q1 2019	Q2 2019	Q3 2019	Q4 2019
Blockchain in finance - 2019	Report	Jan 2019			
Orange mobile banking	Market Brief	Feb 2019			
Fintech global trends - 2019	Report	Mar 2019			
Artificial intelligence in banking - 2019	Report	Mar 2019			
Cloud in finance - 2019	Report			Jul 2019	
Fintech disruption on lending - 2019	Report		Sep 2019		
Fintech top 250 scorecard - 2019	Report				Oct 2019
Challenger banks scorecard - 2019	Report				Nov 2019
Others (depend on industry news/events)	Market brief		Apr 2019	Jul 2019	

## Research Portfolio

### Intelligence Services

#### World class datasets which leverage IHS Markit's expertise in the financial sector:

- Continuous coverage of the top 250 fintech companies, payment and banking card trends and mobile payment insights
- Frequent analyst commentary on product launches, market news and analysis
- Fintech data across 65+ countries
- Analyst access for prompt responses to urgent and unique questions

### Sponsored Series

#### Fintech sponsored webinars:

- Engage the industry with original content
- Help customers to influence the market
- Provides thought leadership
- Helps to obtain fresh leads and provide new sales potential

#### Custom whitepapers:

- Engages potential customers within the industry
- Provides thought leadership and increased industry coverage
- Helps with lead generation

### Custom and Consult Capabilities

#### Proven expertise in:

- Market sizing and forecasting
- Market entry and development
- M&A due diligence
- Customer and competitor research
- Market and strategic planning
- Product optimization

#### Leverage analysts globally to:

- Reduce risk
- Streamline business planning
- Accelerate informed decisions
- Promote confidence



# Country coverage



## Market database & forecasts - country coverage

- Fintech IS covers fintech data for 65 countries
- Database available with detailed level of geographic granularity.
- Subscribers also get deep dive regional reports to accompany the database.

Africa & Middle East	West Europe	C&E Europe	North America	South & Central America	Asia Pacific
Algeria	Austria	United Kingdom	Canada	Argentina	Australia
Egypt	Belgium	Bulgaria	USA	Brazil	China
Iran	Denmark	Croatia		Chile	Hong Kong
Israel	Finland	Czech Republic		Colombia	India
Kenya	France	Estonia		Mexico	Indonesia
Morocco	Germany	Hungary		Peru	Japan
Saudi Arabia	Greece	Ireland		Uruguay	Malaysia
South Africa	Italy	Latvia		Venezuela	New Zealand
Tunisia	Netherlands	Poland			Pakistan
United Arab Emirates	Norway	Russia			Philippines
	Portugal	Turkey			Singapore
	Spain	Ukraine			South Korea
	Sweden				Taiwan
	Switzerland				Thailand
					Vietnam

# Analysis, data & Insight



## Data analysis and insights

### • Market brief/insights

– frequent analyst commentary on product launches, market news and analysis

### • Top 250 fintech company (tracker & analysis)

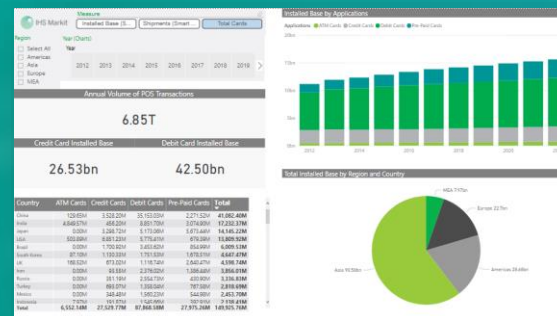
– continuous coverage of top 250 fintech companies, historical data for investors and funding, as well as forecast for revenue, market share and ranking.

### • Fintech trend report

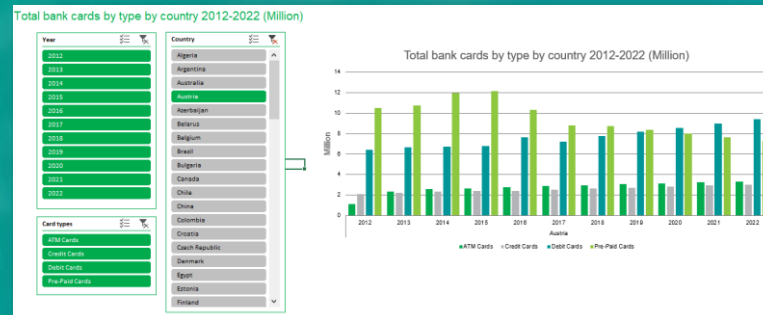
– Following industry events, we provide regular commentary on product launches, market news and analysis. Topics including digital payments and mobile banking, blockchain, insurance, lending, commerce & Retail etc.



## Power BI data visualization



## Excel pivot table



## Exclusive Webinars

Fintech sponsored series

**Sponsor an IHS Markit Technology Webinar to  
ENGAGE YOUR AUDIENCE WITH ORIGINAL CONTENT,  
INFLUENCE THE MARKET,  
GET FRESH LEADS.**

CONTENT	MARKETING	RESULTS
Collaboration on content development	Targeted invitations to our global community (350,000 members)	One-hour live presentation, with audience Q&A
Analyst presentation and event moderation	Promotion in relevant Infonetics e-newsletters	Highly targeted audience
Archived webinar for your website and marketing	Social media campaign	Sales leads and event report

### BENEFITS

- Receive mention in all event promotions
- Receive detailed contact information for all registrants in follow up reports
- Sponsor logos displayed in all marketing materials as well as the companion report
- Your webinar is archived on the IHS Market site for 3 months where it can be viewed on-demand
- Gain an even larger audience with our optional Webinar Companion Report (\$10,000) published as part of the event

### ATTENDANCE RESULTS

**521**

Average registrants per webinar

**Sales & Marketing  
to  
Product Management**

**50mins**

Average attendance time

Webinar attendees rate our content

**95%**

Good to Excellent

# Custom whitepapers

## Fintech sponsored series

### Sponsor an IHS Markit Technology Webinar to

IHS Markit consulting leads support the process from the project kick-off through to the final publication and distribution of the white paper.

#### Planning and strategy

Project kick-off with consulting lead and analyst team.

Agreement on white paper content and project milestones.

#### Research and analysis

Initial white paper content driven by our analysts' in-house market knowledge.

Secondary research conducted to develop case studies and other analysis.

Custom data built from our core syndicated data sets to support key conclusions.

Where required primary research will be conducted to develop new themes.

#### Proofing and publication

Peer review, internal proof reading and client feedback.

Publication of final white paper and distribution support.

### POSSIBLE TOPICS

AI in banking

Challenger banks disruption

How can telecoms get involved in fintech industry?

How can traditional financial institutions embrace the new fintech era?

Consulting leads help you **navigate the analyst eco-system** and ensure that the **right data and insight** is sourced for the white paper.





## **Thomas Lynch**

Executive Director,  
Security, Fintech & Blockchain Intelligence Service

Thomas Lynch is the Executive Director for Security Technology, Safe Cities and Critical Communications at IHS Markit Technology. IHS Markit have been providing research on the Security and Critical Communications market now for over 20 years and is a recognized leader in security research and market intelligence. Thomas and his team of global experts focus across video surveillance equipment, safe cities, public safety, future communications technologies such as LTE, command & control and Cybersecurity.

Thomas holds an Distinction at MBA from the University of Leicester in International Business, is a Chartered Marketer, Chartered Manager and has over 20 years operational, engineering communications and security experience. Thomas is a renowned international expert in the fintech, blockchain, critical communications and security industries, he is regularly invited to speak at global conferences and client events, providing his industry leading insights on these evolving industries.

**Ruomeng Wang**

Research & Analysis Manager,  
Fintech & Blockchain Intelligence Service

Ruomeng Wang is a Research & Analysis Manager covering fintech and blockchain intelligence service at IHS Markit based in London.

Ruomeng has led consultancy projects on subjects ranging from fintech developments in both emerging and developed markets to blockchain applications for telecom, media platforms and smartphone makers. Her research and analysis includes studies of the global fintech competitive landscape, blockchain opportunities in telecoms and media, how challenger/neo banks are disrupting traditional financial services, the payment strategies of leading telecom operators, OTT players and media platforms, and payments and financial inclusion in emerging markets.

A regular speaker at industry conferences such as MWC, Blockchain Summit, Fintech Global Connect and widely quoted in coverage of fintech and mobile financial services by leading news organisations including Forbes, CNBC, Reuters and Mobile World Live.



**Don Tait**  
Principal Analyst,  
Fintech & Blockchain Intelligence Service

Don Tait is an IHS Markit analyst specializing in the areas of blockchain and fintech. Don has over 20 years market intelligence experience. In addition to his work on blockchain and fintech, Don has also covered areas such as identity and access management, public safety technologies, chip-to-cloud security, fraud protection in payments, payment and banking cards, SIM/eSIM cards, NFC, smart cards, mPOS and contactless credentials.

Before joining IHS, he served as a Telecoms Research Analyst with Frost & Sullivan and was responsible for the firm's broadband services subscription. Prior to Frost & Sullivan, Don was a Marketing Consultant with Marketing Research for Industry Ltd, for which he wrote industrial, healthcare and telecommunication reports.

Don Holds a BA (Hons) in Business Studies from Edinburgh Napier University. He is based in the company's Wellingborough, UK office.

## About IHS Markit



# Industries we serve

Unmatched depth and expansive breadth provide a holistic view of adjacent markets



# IHS Markit Technology covers a broad array of technology, media and telecoms markets



## Teardowns & Cost Benchmarking

- Teardowns
- Cost modeling
- Component pricing
- Parts solutions

### Automotive Electronics



- Electronic systems & semiconductors
- Cost management
- Connected car

### Displays



- Display manufacturing & supply chain
- Display materials & components
- Large displays
- Small & medium displays
- Touch & interface

### Mobile, Consumer & Connected Devices



- Mobile devices
- Consumer electronics
- Lighting
- Digital signage
- Smart home & appliances

### Security Technology



- Access control & fire
- Video surveillance
- Cybersecurity & digital ID
- Critical communications

### Mobile & Telecom



- Operators & services
- Mobile innovation
- Mobile networks
- Voice & data networks
- Service provider
- Broadband & video
- Managed services

### Enterprise & IT



- Data center & cloud
- Enterprise networks & communication
- Enterprise IT security
- M2M, IoT & connectivity

### Semiconductors



- Semiconductor market
- Semiconductor components
- Semiconductor manufacturing
- MEMS & sensors
- Memory & storage

### Power & Energy Technology



- Smart grid & energy storage
- Power supplies & wireless charging
- Solar

### Media & Advertising



- Advertising
- TV media & content
- Video
- Digital media
- Games
- Cinema

### Healthcare Technology



- Medical devices & equipment
- Healthcare IT

### Manufacturing Technology



- Capital equipment & machinery
- Electric motor systems
- Discrete & process automation

# Delivering information, insight and analytics for all key technology sectors



## Deep market insight

End-to-end coverage of the technology ecosystem

**300+**

sector and industry analysts worldwide

— Referenced >139,000 times in 2015 by press and analysts

Webinar opportunities



## Custom research & consulting

Proven capability to leverage existing expertise and research

**1000+**

consulting projects to date

— Expertise in market expansion and competitive assessments



## Parts management

World's most comprehensive electronic components database

**500M+**

electronic components, 131 technical attributes

— Industry-leading historical content (since 1960)



## Analytics

Performance & benchmarking, scorecards, advanced analytics

**10M+**

test cycles conducted annually

— The recognized standard for mobile performance measurement



## Component cost information

Supply chain pricing and teardown analysis

**200+**

teardowns conducted annually

— Teardown insights to make cost-effective tactical and strategic decisions



# How we can assist you

## Project-based engagements

We're here to help you achieve great things and make a lasting impact on your long-term performance. To this end, we offer the following custom research and consulting services:



### Market sizing and forecasting

Designed for clients who need specific market data or additional segmentation to support strategy and decision-making. Encompasses:

- Customer-specific total available market (TAM) analysis
- Market driver analysis and forecasting
- Pricing and purchasing models



### Market entry and development

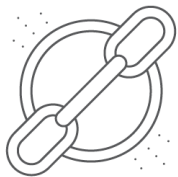
Created for clients who need reliable intelligence on new market opportunities and a partner to help launch new products or services. Covers:

- Country-specific market analysis
- Competitive landscape
- Barriers to entry and risk assessment
- Distribution and sales channel analysis
- White papers



# How we can assist you

## Project-based engagements (cont.)



### Operational excellence

Aimed at clients who are looking to improve efficiencies, optimize performance and gain competitive intelligence. Includes:

- Strategic procurement advisory services
- Supply chain analysis
- Margin stack analysis
- Technology radar



### Customer insight

Formulated for clients who are seeking to understand their customers' critical success factors across different geographic markets and end-user industries. Comprises:

- Consumer surveys
- Direct customer and partner surveys
- Industry expert analysis



### Financial analytics

Designed to give clients a broader picture of the financial landscape to aid in planning and cost modeling. Covers:

- Economic impact analysis
- Merger and acquisition research and insights
- Commercial due diligence

# How we can assist you

## Continuing engagements

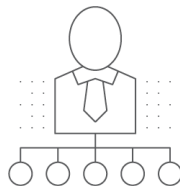
Need help beyond our standard consulting offerings? We also offer engagement services on an ongoing basis.



### Strategic support services

Created for companies that have wide-ranging and diverse business initiatives or operational issues, this program provides your company with an IHS Markit subject matter expert who utilizes our broad portfolio of analysts and research to coordinate real-time support, analyst engagement or custom data cuts to address your specific requirements.

Strategic support services are available to assess adjacent markets relevant to your core business, evaluate new strategic focus areas, answer customized research needs and more.



### Executive advisory services

Designed to support one to two of your key initiatives, this program offers a deep and enduring relationship between your senior strategy executive (or small strategy team) and a dedicated IHS Markit senior analyst advisor.

Whether it's M&A, R&D, geographic expansion or industry disruption, our executive advisors can serve as a sounding board for your strategic thinking and provide active recommendations. These senior analysts have their fingers on the pulse of your industry—and access to a huge portfolio of data and insights—and can convey what's happening, why it's happening and what it means for your business in detailed fashion.

Executive advisory services can be delivered on a weekly, monthly or quarterly basis.



For further information please contact the analysts:



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