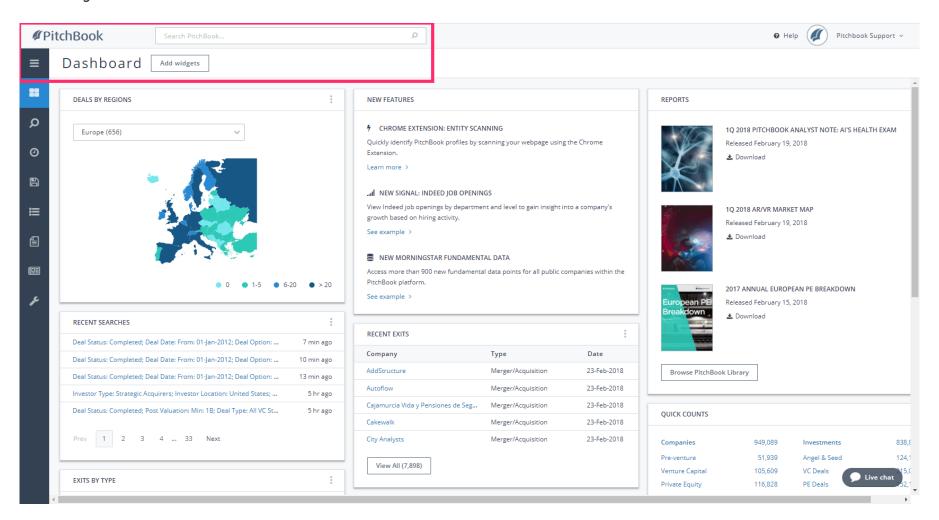


PitchBook Data

In this tutorial, we will build an advanced search to find historical deal activity. From that list, we can take a look at the individual transaction details, or we can create charts to identify trends of the overall market.

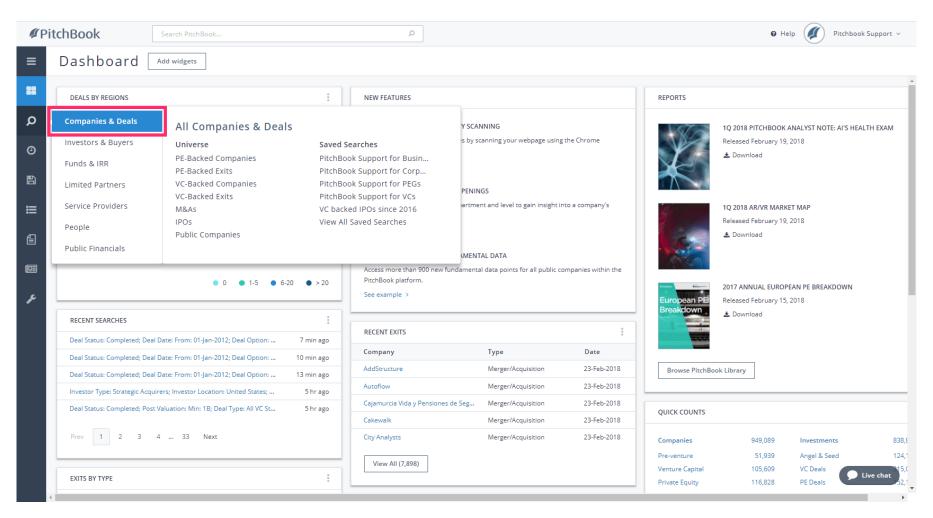


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PitchBook Data

From the Dashboard, hover over the Search icon to open the Advanced Search menu. Click Companies & Deals

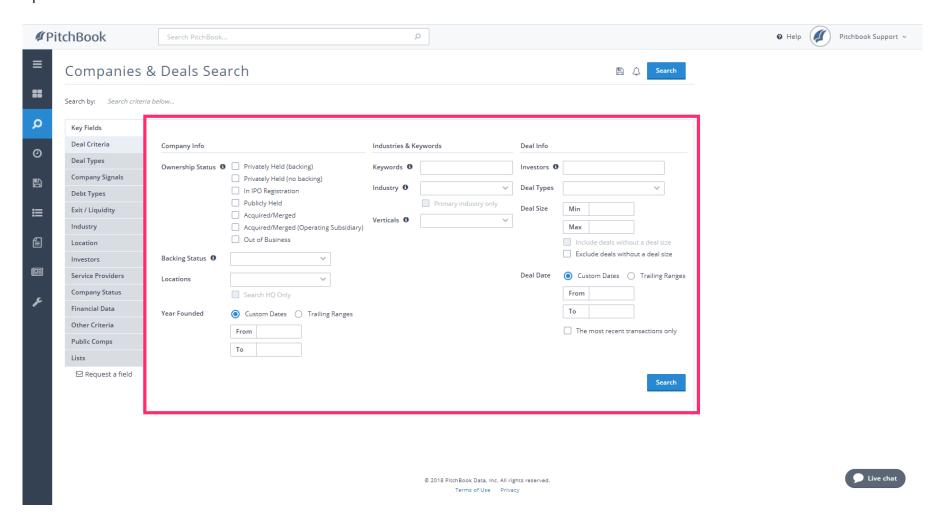


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PitchBook Data

From the Search Criteria page, the Key Fields section will display the most commonly used fields. Let's visit some of the tabs on the side so that we can have a deeper view of our options.

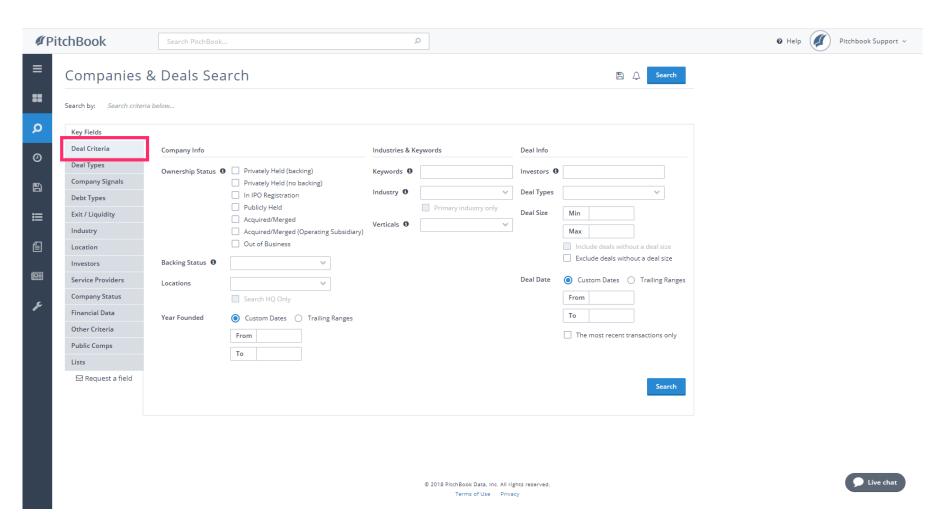


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PitchBook Data

Click Deal Criteria

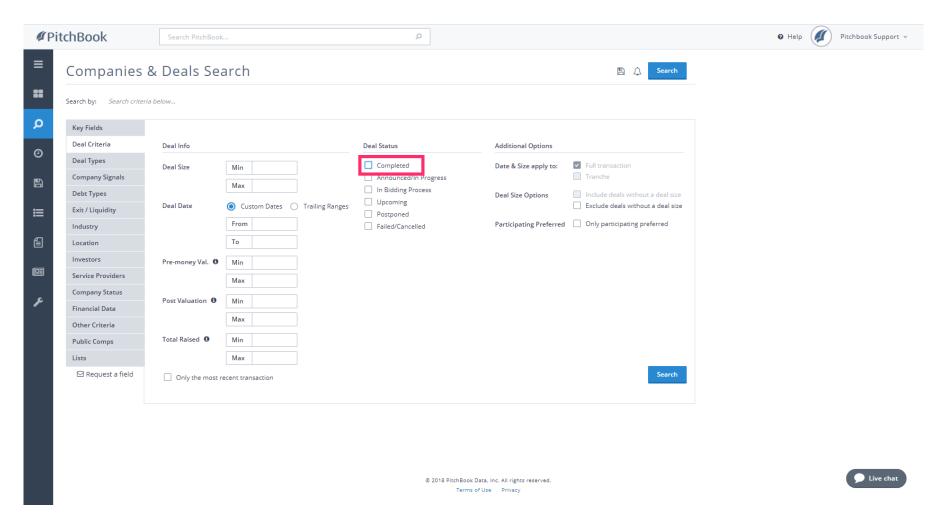


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PitchBook Data

Under Deal Status, click Completed This is selected so that we don't pull in any upcoming or cancelled transactions into our results.

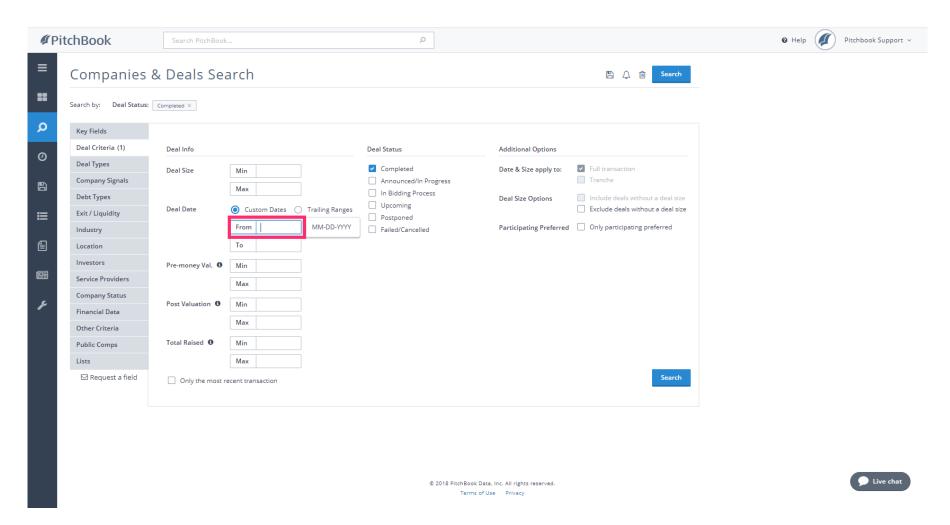


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PitchBook Data

Next, we'll want to set parameters on when the deals occurred. Click Deal Date - From

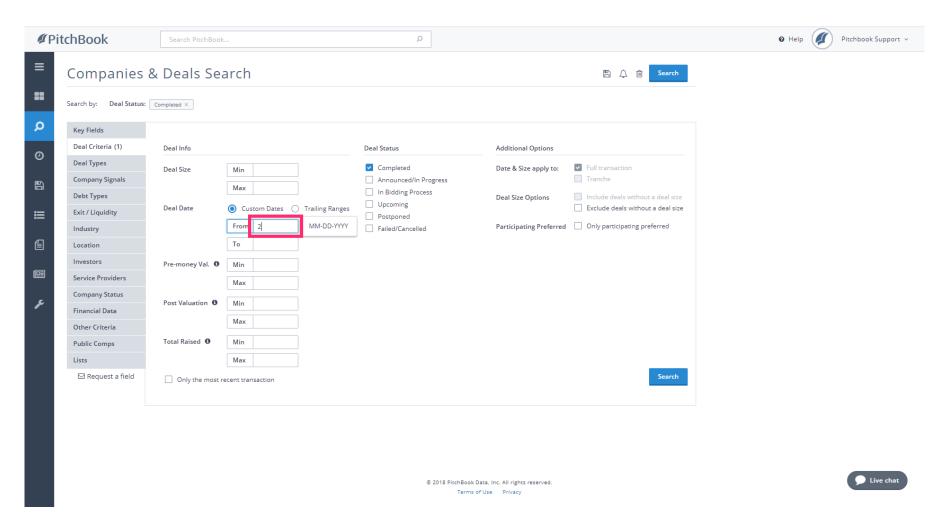


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PitchBook Data

Type 2012 This will automatically set the Deal Date to January 1, 2012.

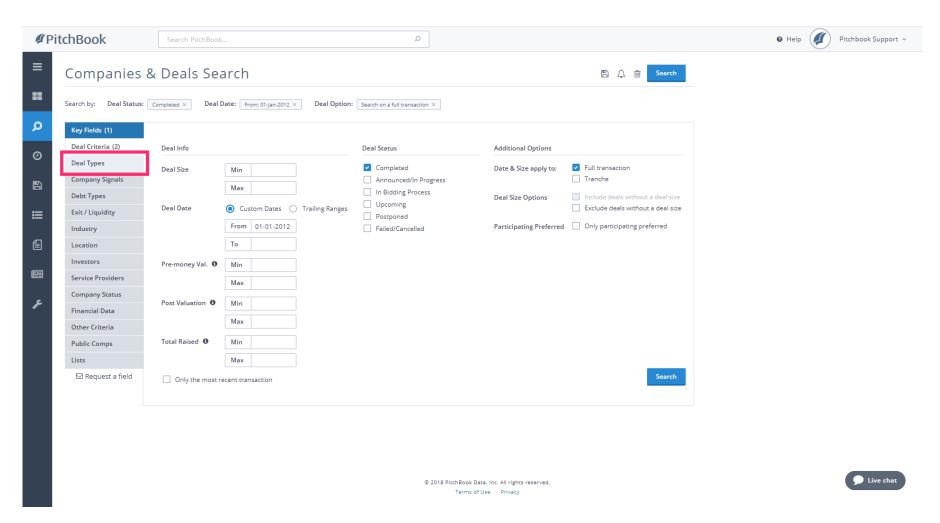


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PitchBook Data

Click Deal Types



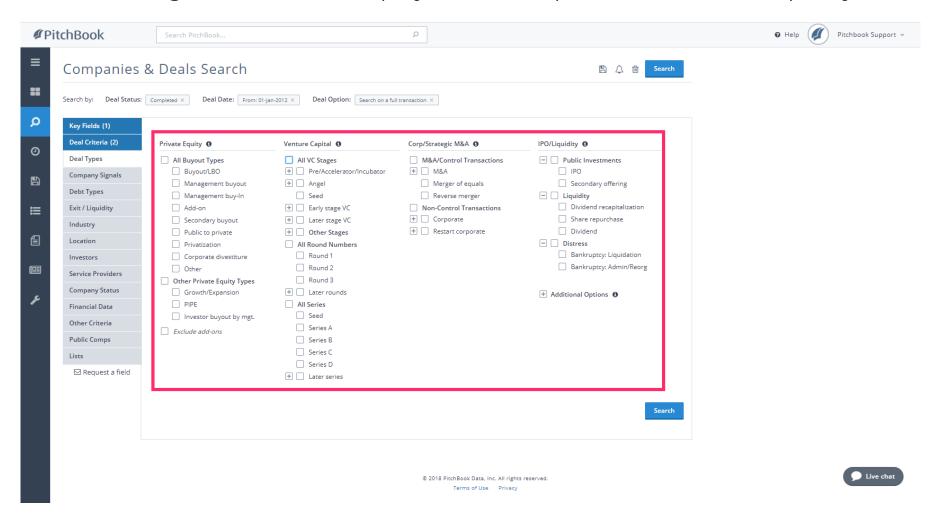
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PitchBook Data

The Deal Types section allows us to determine which types of transactions we want to see.

The main categories are Private Equity, Venture Capital, M&A and IPO/Liquidity.

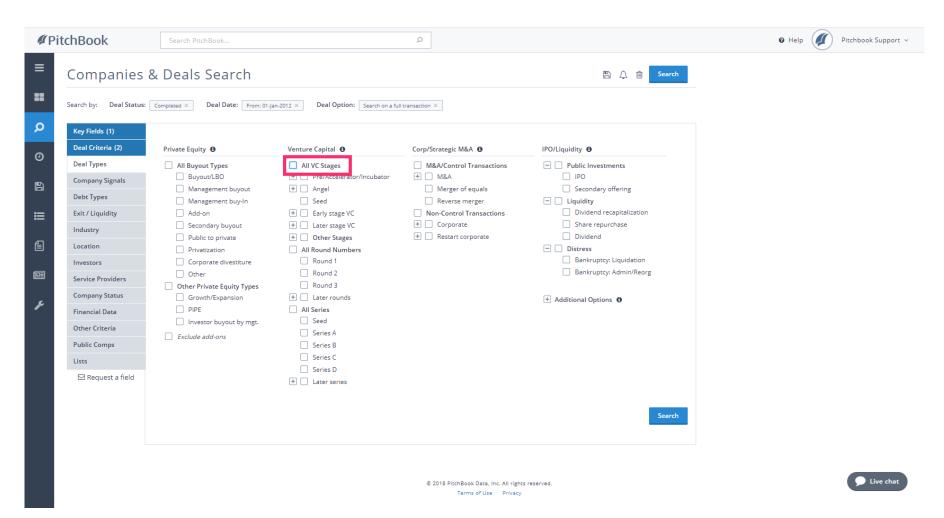


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PitchBook Data

• For our search, let's look at only Venture Capital deals. Click All VC Stages

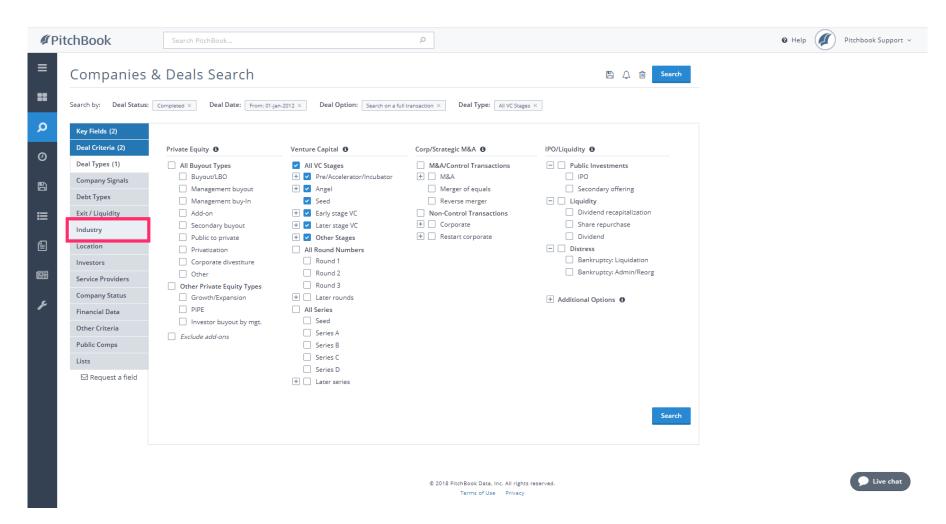


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PitchBook Data

Click Industry

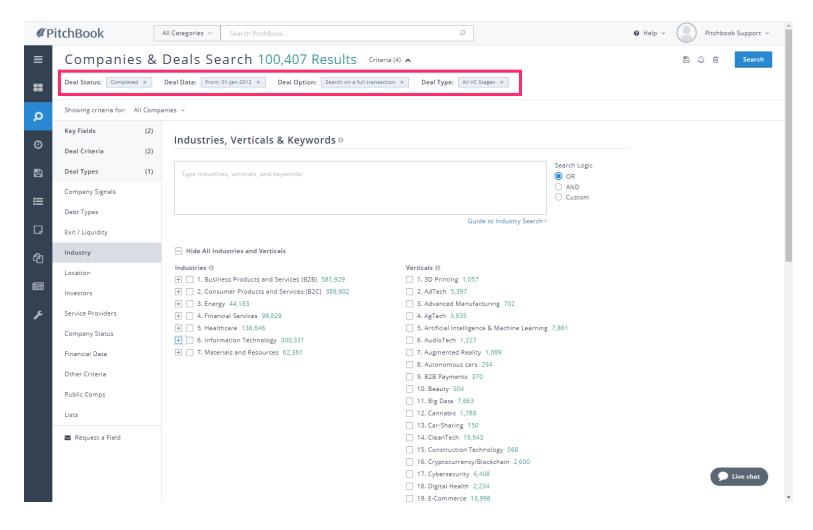


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PitchBook Data

Currently, our criteria is set up to look for all VC deals that have been completed since 2012.
The next step is to determine the industry of the companies involved in these deals.

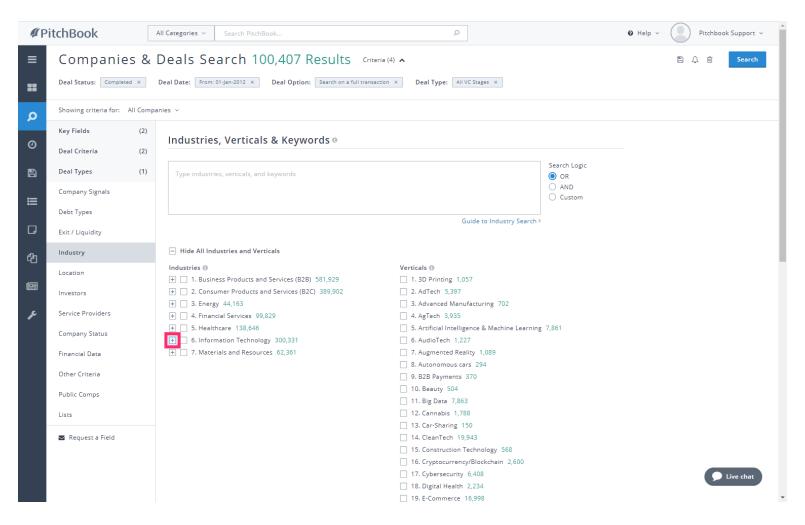


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PitchBook Data

There are seven main Industry Sectors, and housed within each sector are Industry Groups.
Click + to expand Information Technology

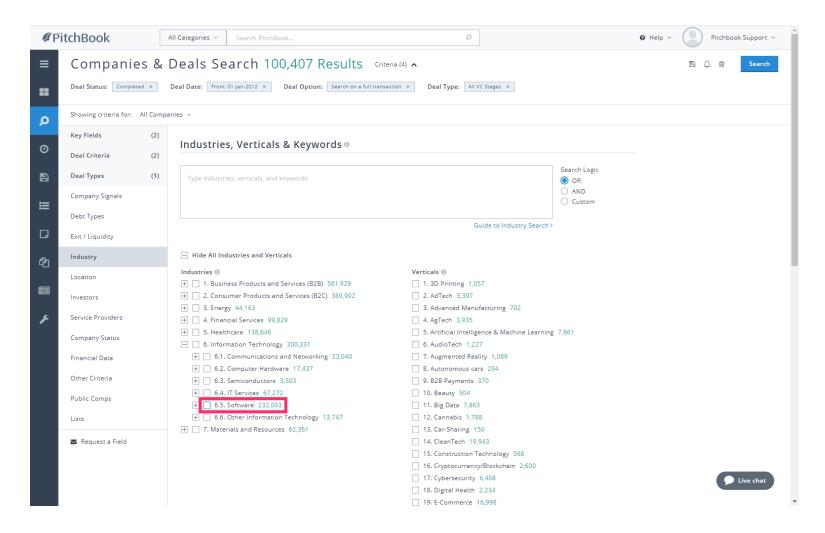


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PitchBook Data

Click to select the Software industry group

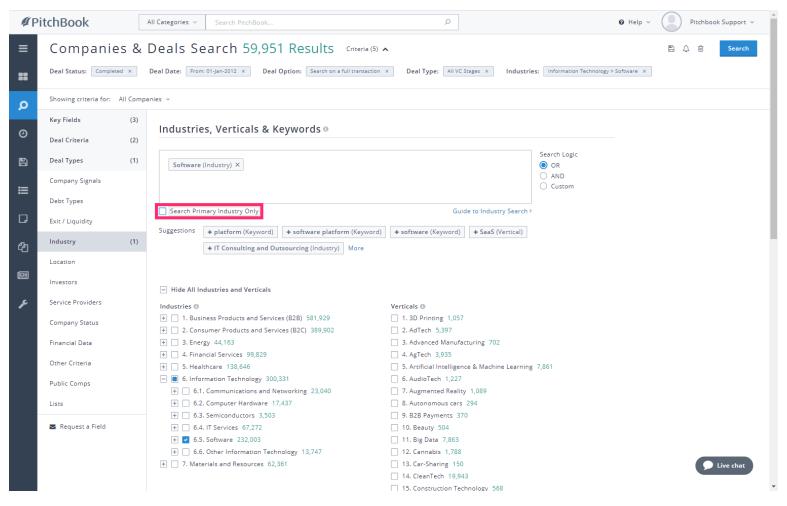


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PitchBook Data

Every company in the PitchBook Platform is associated with at least one industry, and some might be sorted into multiple industries. Click Search Primary Industry Only to focus our search on companies that are primarily within the Software space.

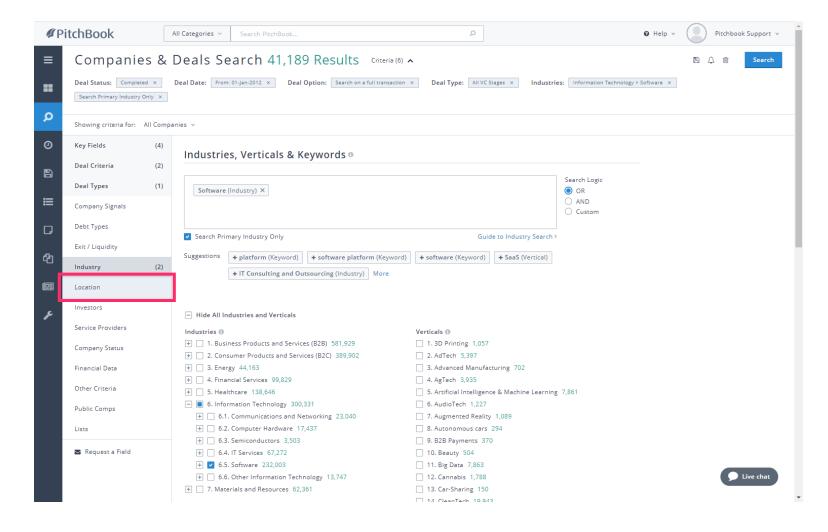


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PitchBook Data

Click Location

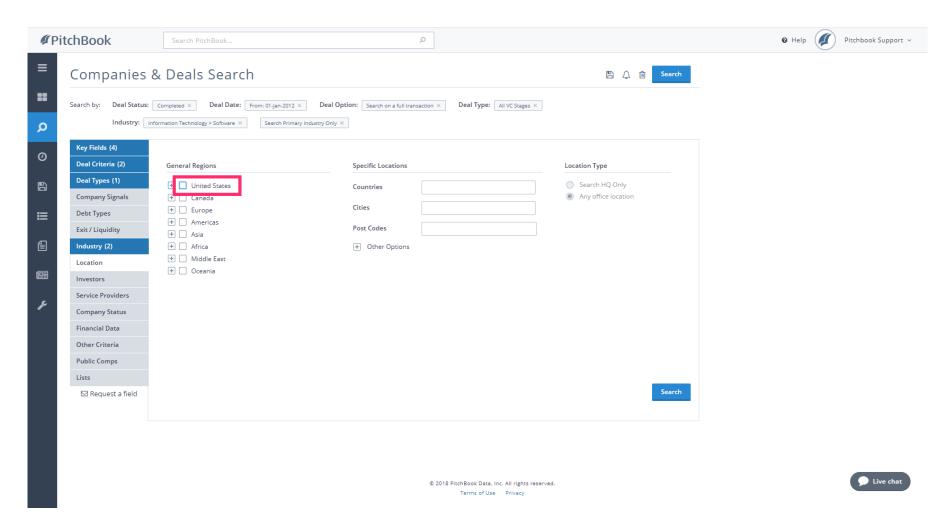


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PitchBook Data

Click United States

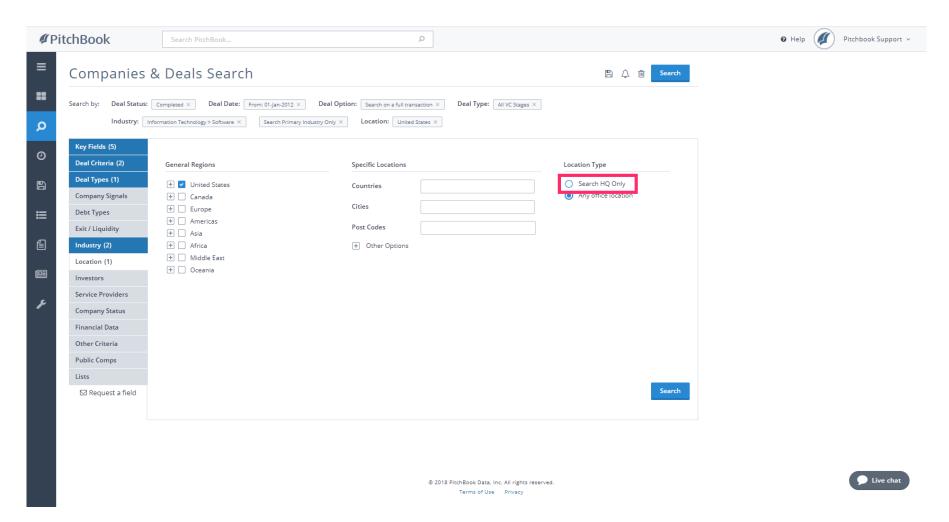


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PitchBook Data

Click Search HQ Only

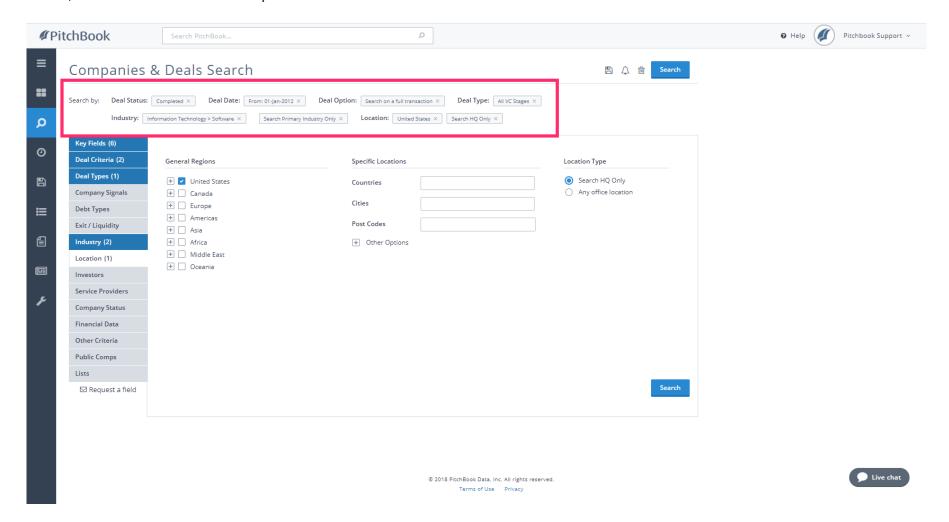


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PitchBook Data

Let's recap our search. We're looking for any type of Venture Capital deal completed since 2012, for Software companies based in the United States.

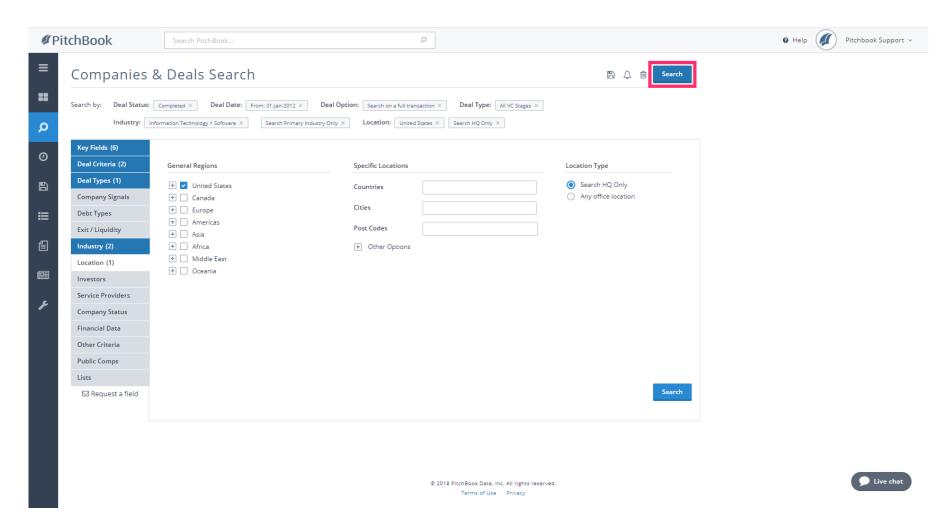


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PitchBook Data

Click Search

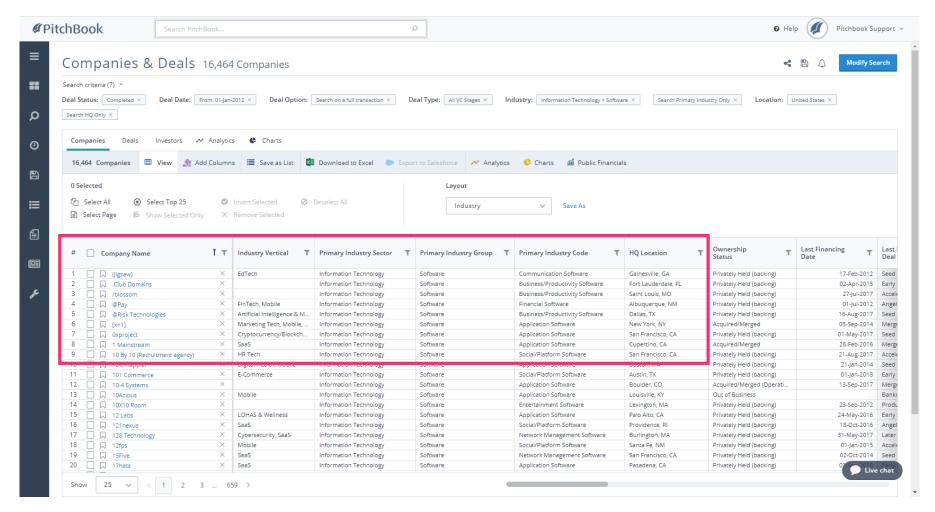


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PitchBook Data

The Search Results page will first show us a list of companies that have gone through any deals that match our criteria. We can see that they're tagged to the Software industry, while also being located in the U.S.

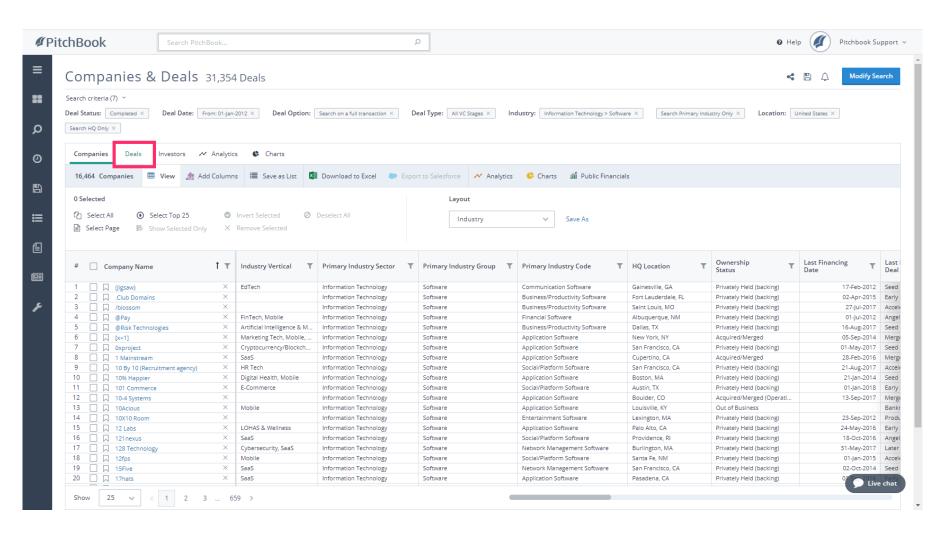


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PitchBook Data

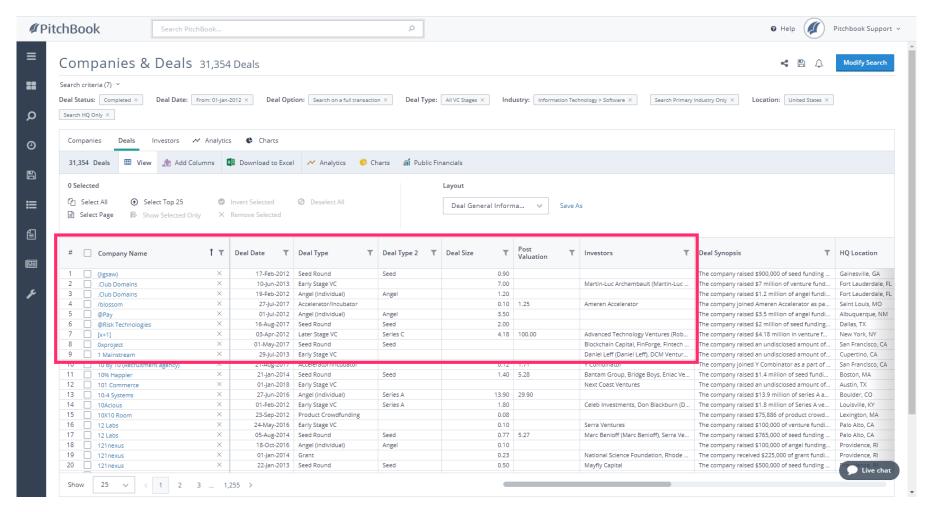
Click the Deals tab.



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PitchBook Data

The Deals tab will display a list of all transactions that match our criteria. There are many Deal Types surfacing but they all fall within the Venture Capital category. Let's try sorting some of the columns to get a different view.

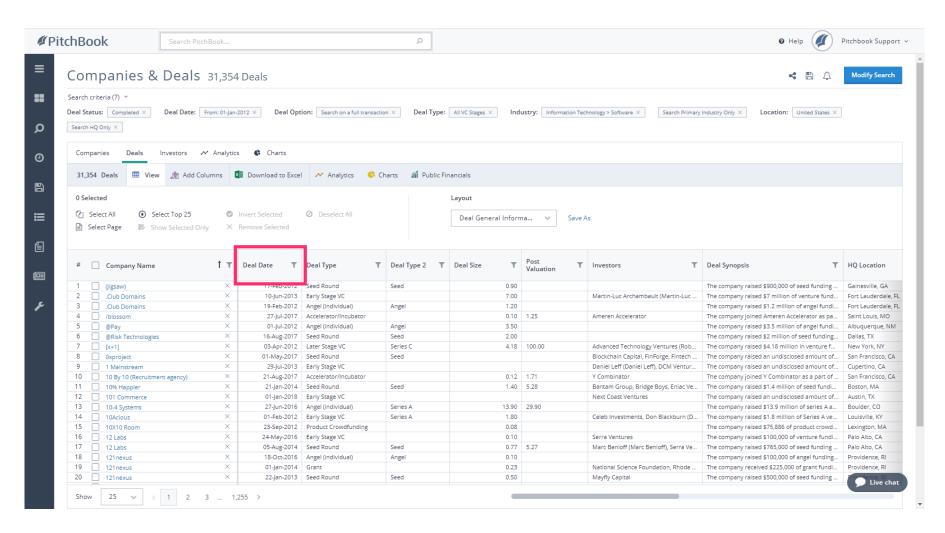


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PitchBook Data

Click Deal Date

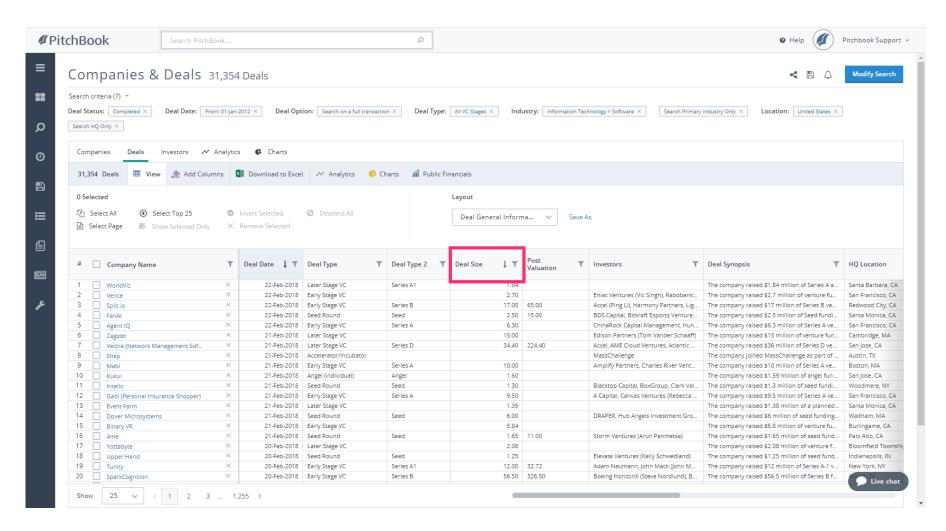


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PitchBook Data

• The list has been reorganized to show only the most recent deals first. Next, click Deal Size

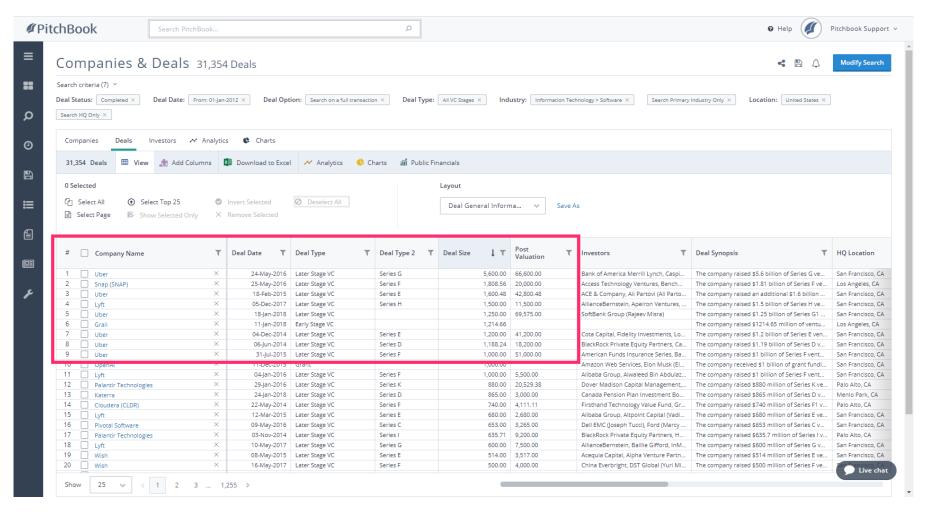


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PitchBook Data

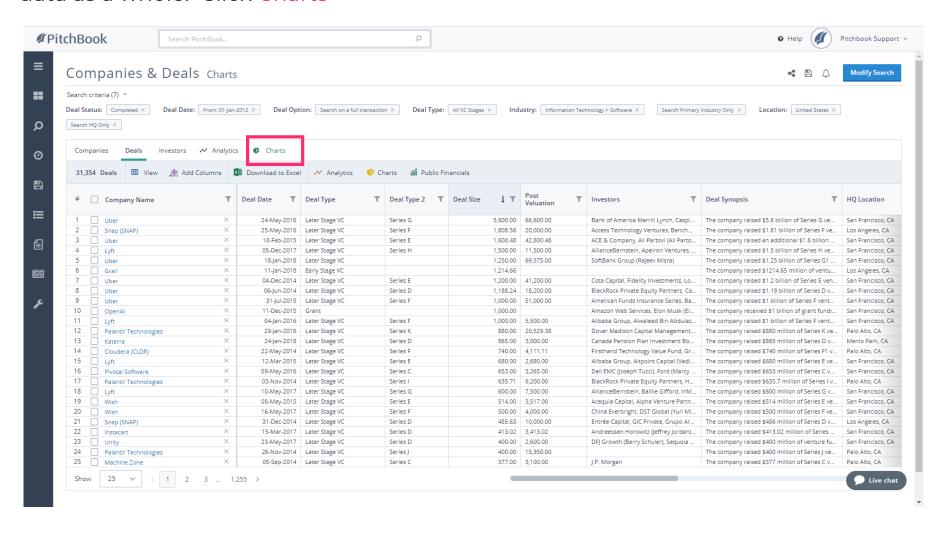
The list has been rearranged once again to display the largest Venture Capital deals since 2012. For example, we can see that Uber had the largest deal during this time period, when they received \$5.6 billion from their Series G financing in 2016.



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PitchBook Data

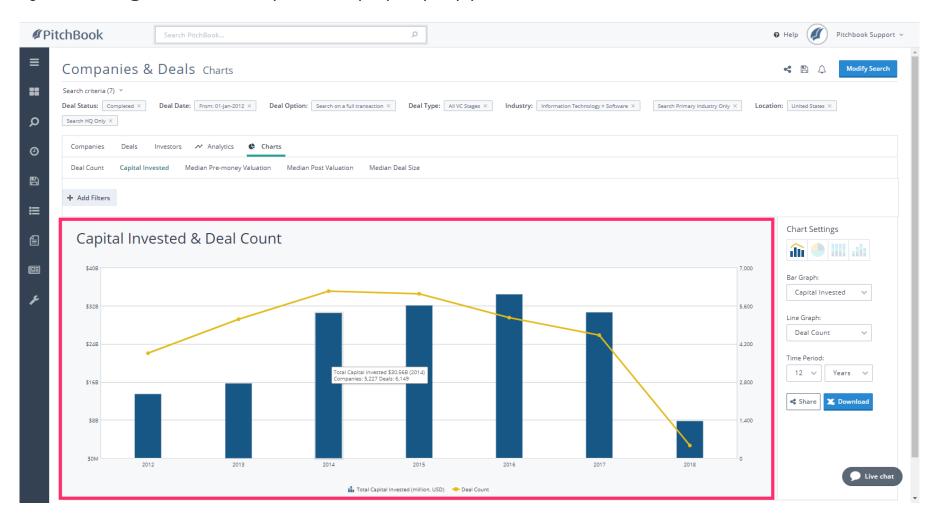
Since we're able to see the details surrounding each individual deal, let's try looking at the data as a whole. Click Charts



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PitchBook Data

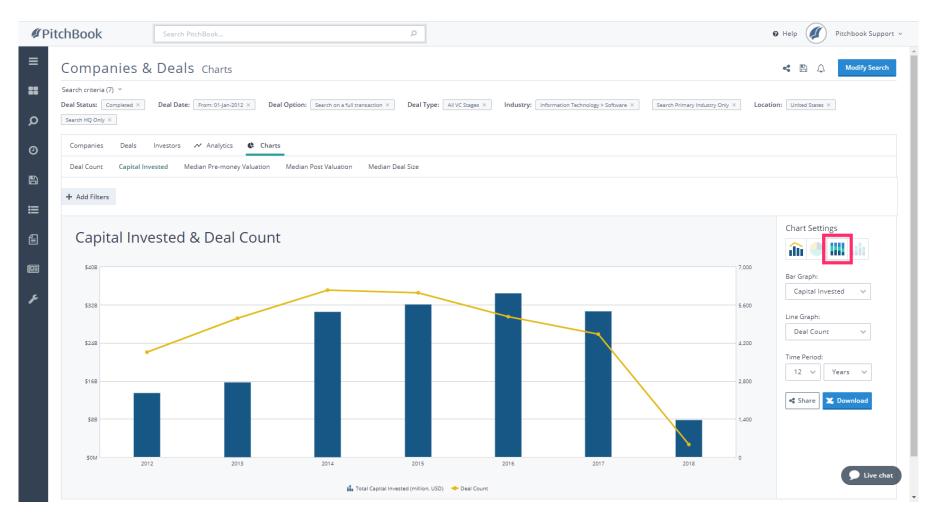
The chart displayed was generated using the data from our search results. We can see the number of transactions that happened each year and the sum of their combined deal sizes. By hovering over a data point, a pop-up appears with more details.



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PitchBook Data

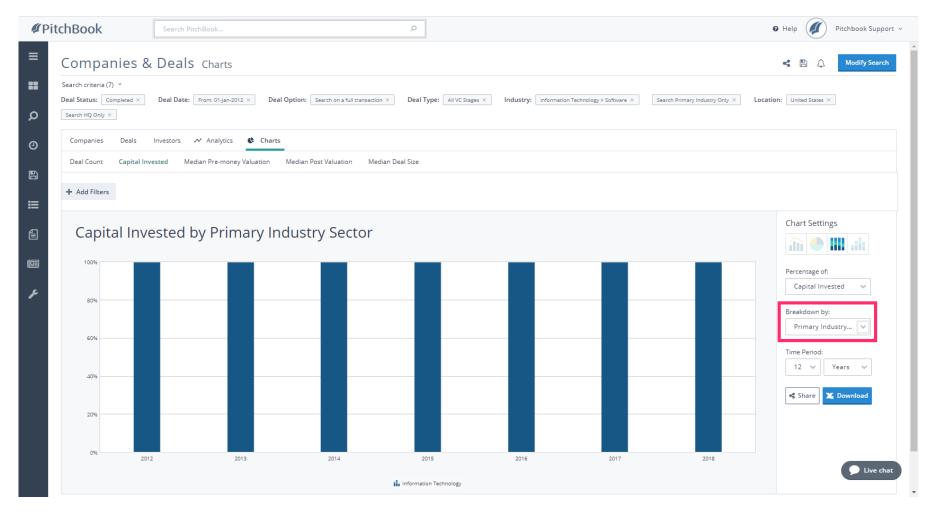
Under Chart Settings, we can change the data points used in the X-axis and Y-axis. For now, let's take a look at data using a different chart type. Click the Stacked Bar Chart icon.



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PitchBook Data

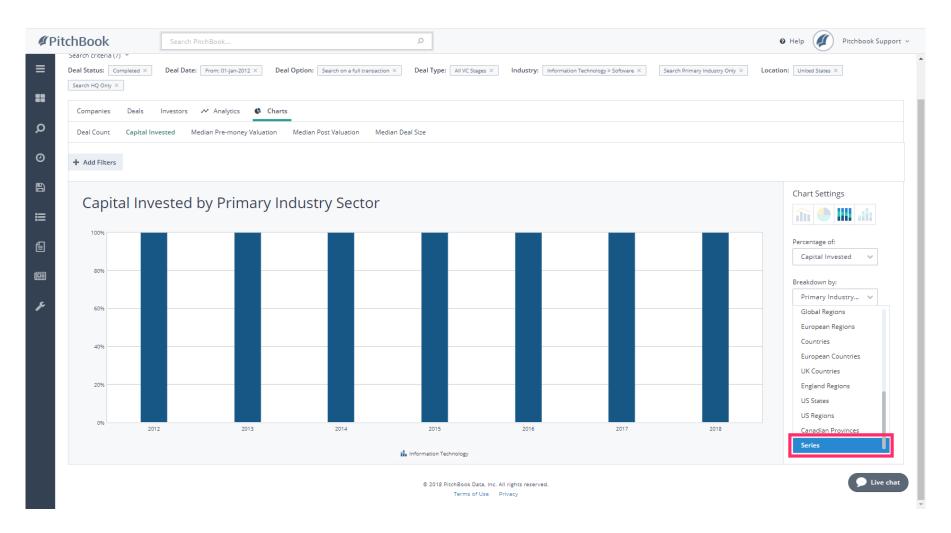
This chart is currently looking at the ratio of capital invested into different industries. Since all the companies in our search share the same industry, this chart shows the same color throughout. Click Breakdown by:



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PitchBook Data

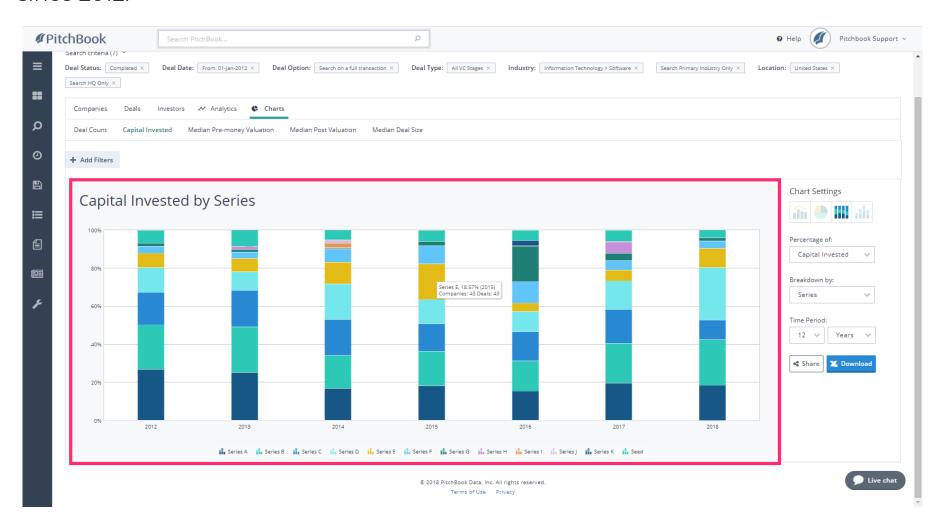
Click Series



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PitchBook Data

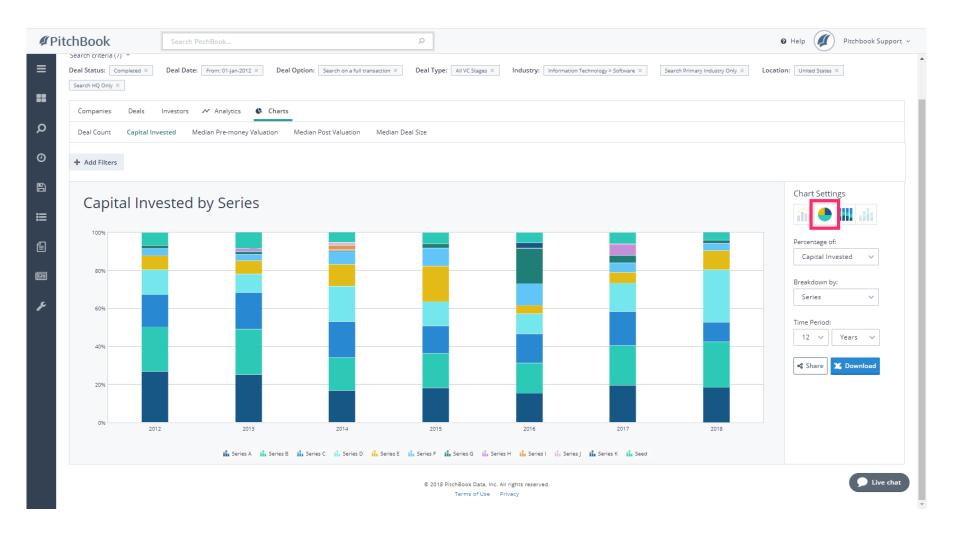
The since 2012. Our chart has changed to show the percentage of Capital Invested by Series for each year since 2012.



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PitchBook Data

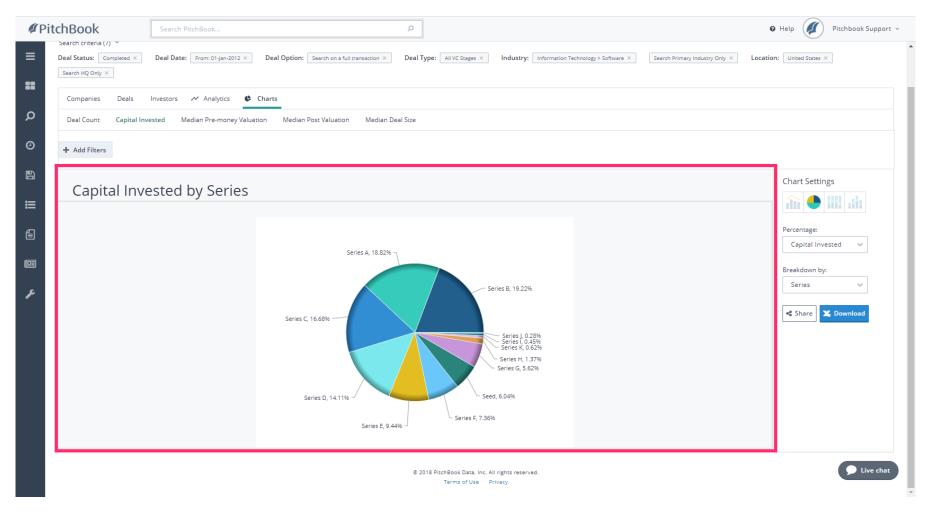
Click the Pie Chart icon



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PitchBook Data

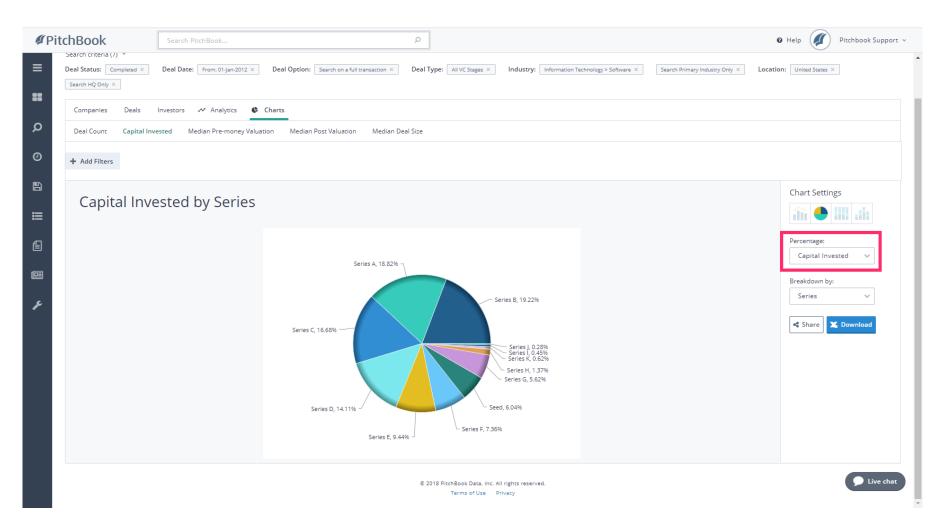
We're looking at the same Capital Invested by Series data set, but instead of by year, we're looking at the entire list of deals from 2012 to the present. Let's change the settings to see how frequently each Series type occurred.



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PitchBook Data

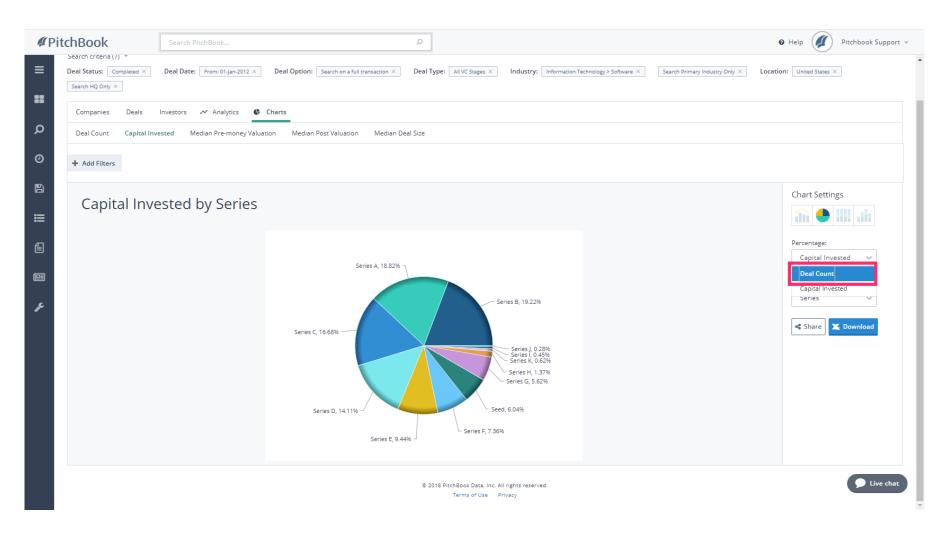
Click Percentage:



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PitchBook Data

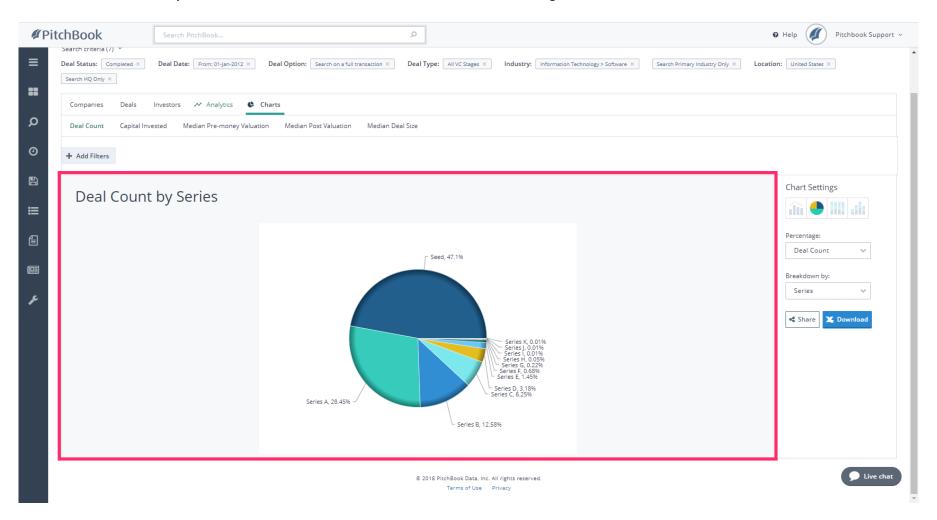
Click Deal Count



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PitchBook Data

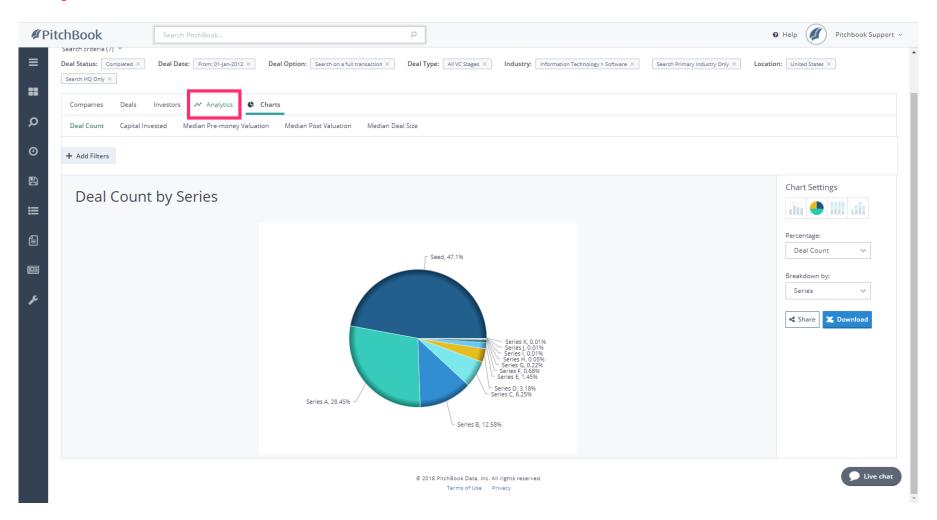
For all the transactions that were pulled into our search results, we can now see that Seed rounds make up about 47% of the total, followed by Series A deals at 28.45%.



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PitchBook Data

• Now that we know how to chart our search results, let's view it in the form of a table. Click Analytics

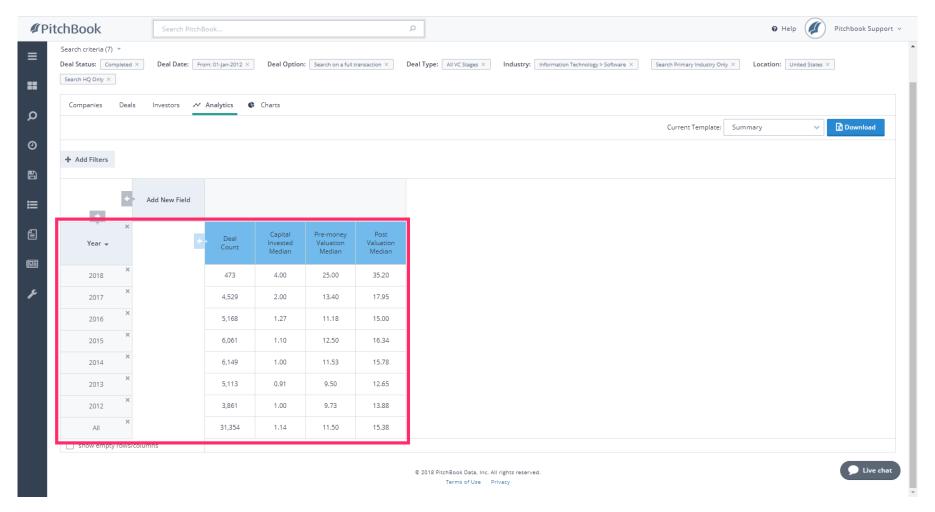


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PitchBook Data

Rather than a visual display, the Analytics section presents the data in the form of a table where we can easily see the values. The default view shows us the deal count per year and medians regarding the deal size and valuation of the companies.

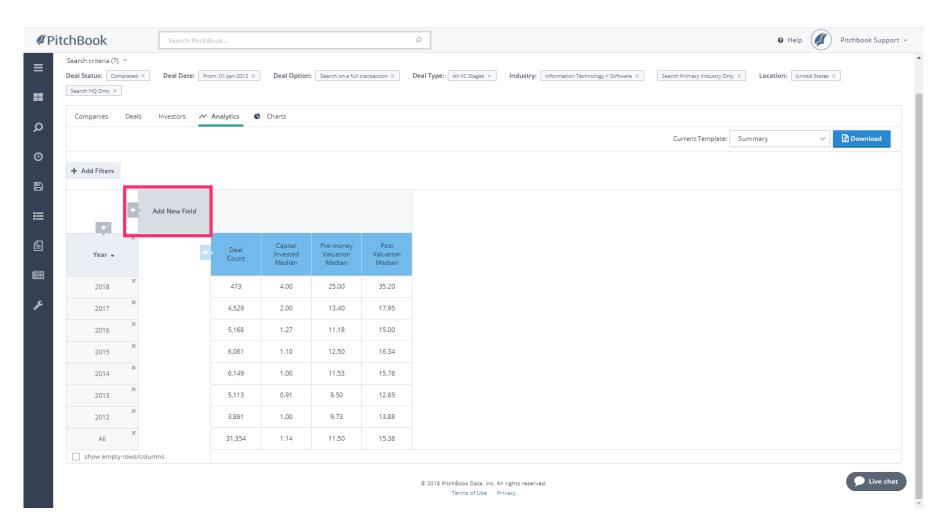


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PitchBook Data

• We can add new fields to further segment our initial data set. Click Add New Field

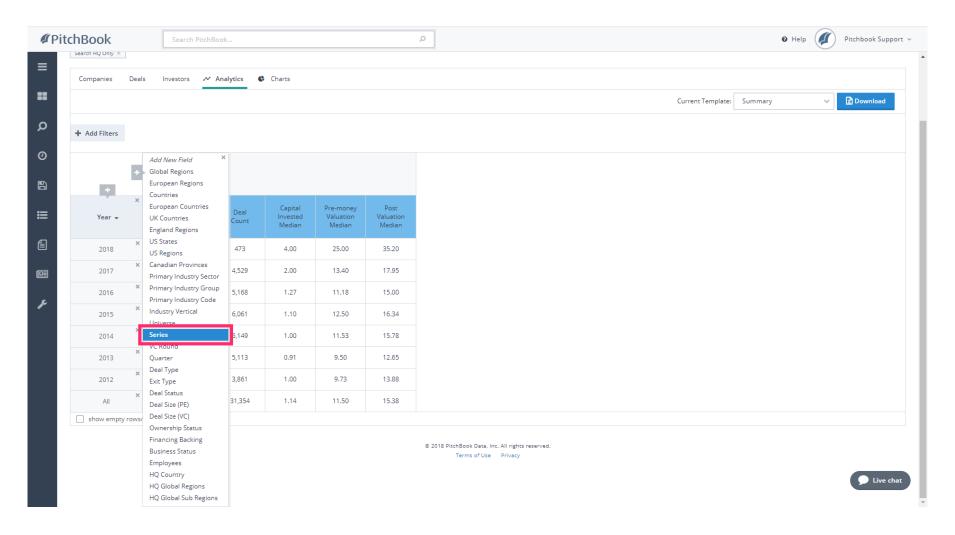


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PitchBook Data

Click Series

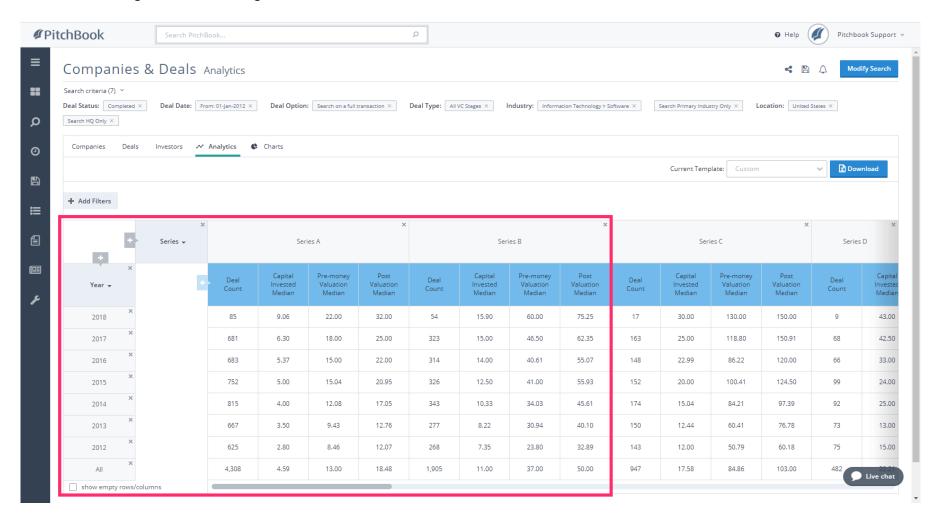


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PitchBook Data

We can now see the Deal Count and Capital Invested Median by Series. This is going to correlate directly to the charts we created previously, except now we can see the values more clearly. The Analytics section allows us to view other metrics too.

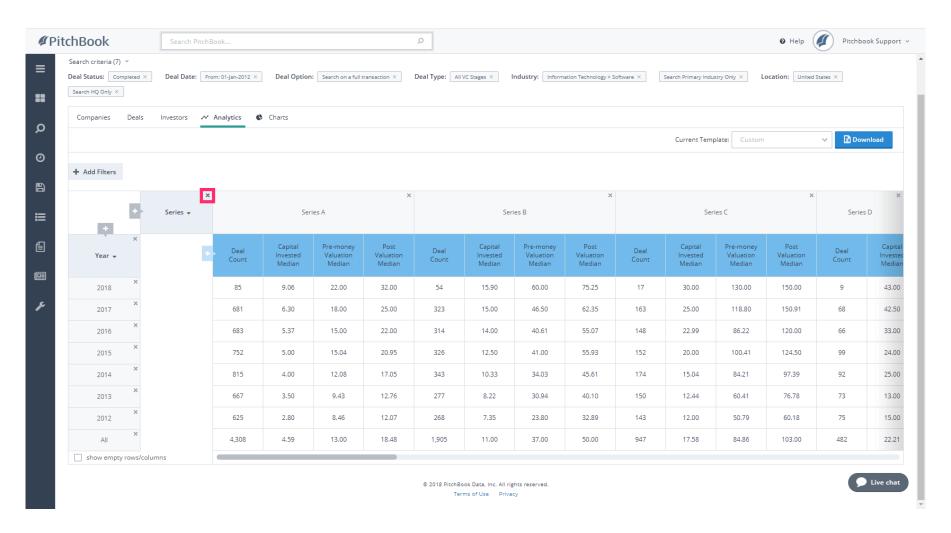


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PitchBook Data

Click X to remove the Series field.

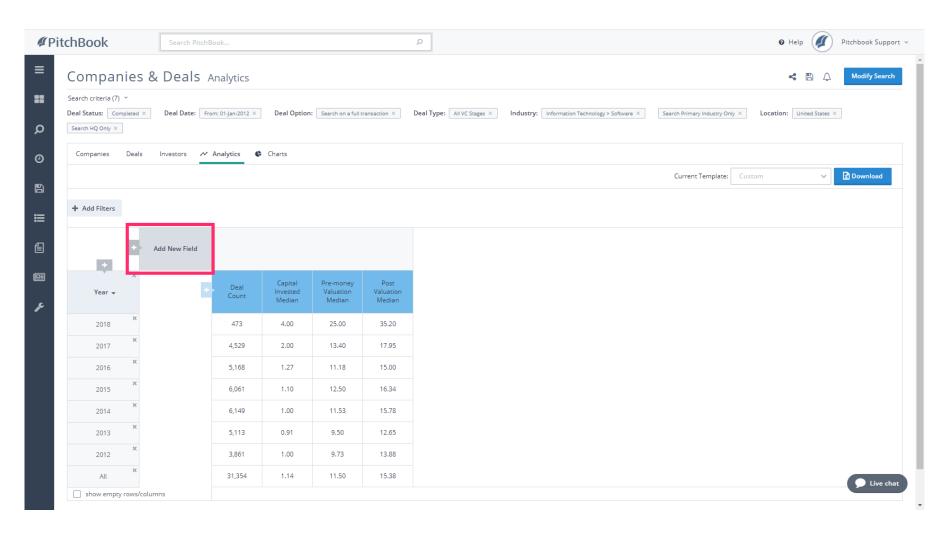


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PitchBook Data

Click Add New Field

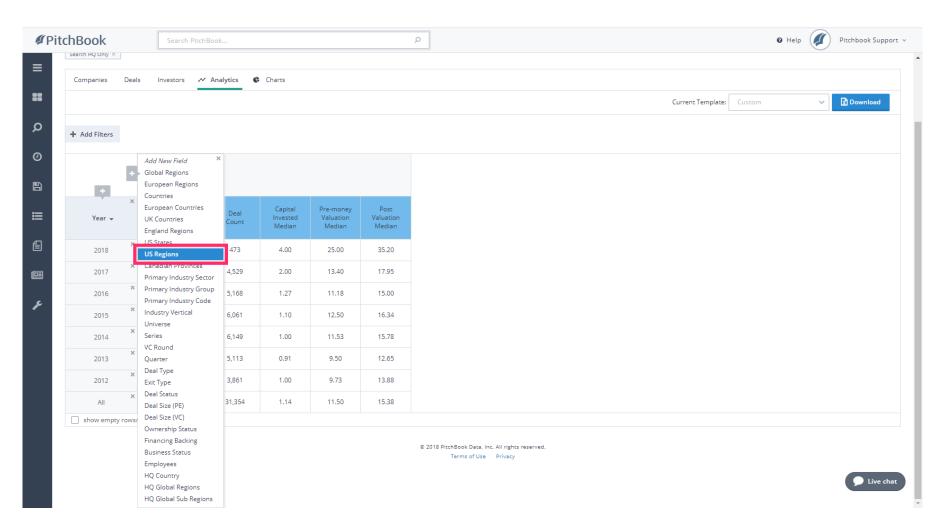


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PitchBook Data

Click US Regions

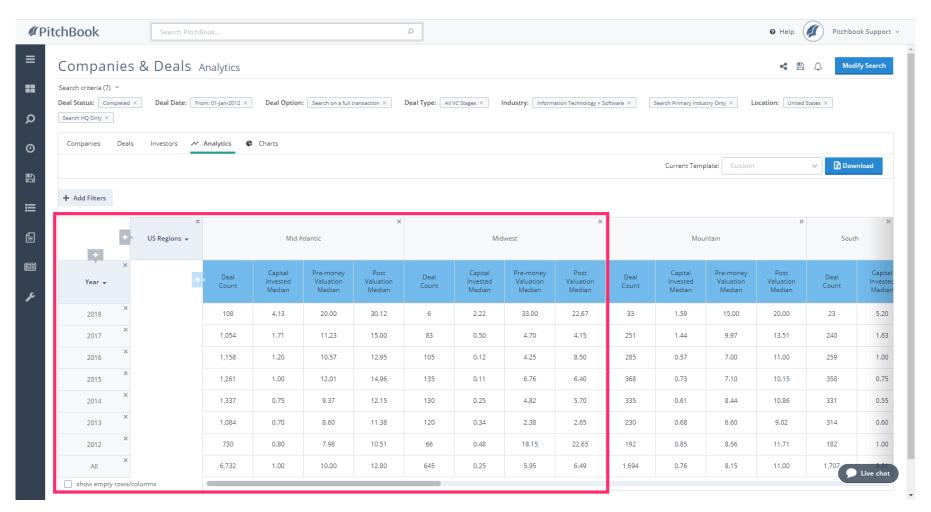


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PitchBook Data

We're now looking at the deal activity in US region, based on where the companies were located. From here, you can continue removing and adding fields or data points to create your own customized table.

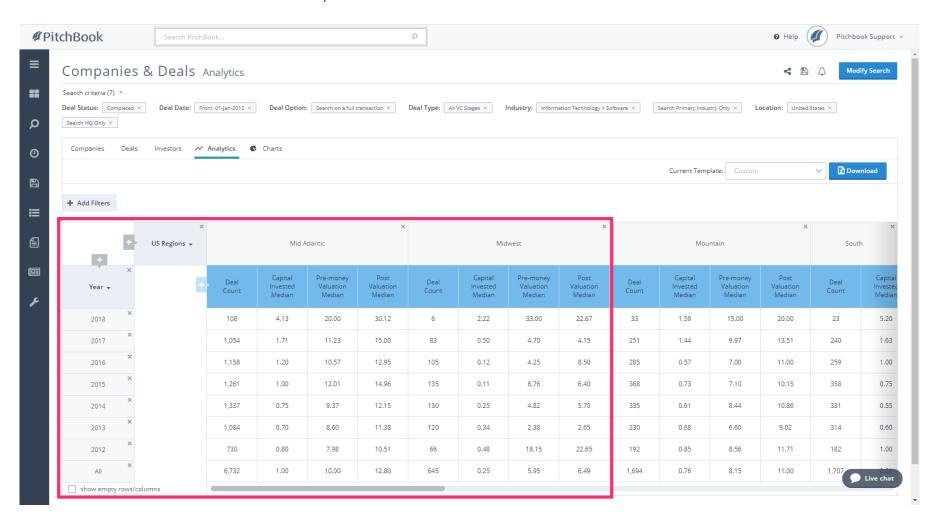


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PitchBook Data

You've now learned how to create a search to pull a list of deals, how to look at their individual transaction details, and how to view the data in the form of a chart or table.



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