

# Mapping the large-cap financial payments sector for a mid-market PE firm



- **Market Due Diligence**
- **Competitive Landscape Analysis**
- **Target Identification**



Source: Freepik

## Business need

- A mid-market private equity firm wanted to identify and benchmark large-cap financial payment companies.
- It was looking at companies that had more than USD100 million in revenues and operated in various segments of the payments market such as Global Distribution Systems (GDS), Card Schemes, B2B Payments, Diversified Fintech, Payment Service Providers (PSP), and Buy Now Pay Later (BNPL).
- It sought our help to understand the key products and solutions being offered by the market leaders and players operating in this space.

To analyse the market leaders in the global Financial Payments sector and benchmark their service capability.

### The client outlined two key reasons for selecting RocSearch:

- Our deep understanding and experience of tracking the global financial services sector.
- Our proven investment research and advisory capabilities.

# Approach & Methodology

- RocSearch team identified the market-leading financial payment companies in each segment across all the major economies, globally.
- For these approximately 90 players, using the company websites, country registrars, subscribed databases, and other sources, we captured their size, ownership, and service offerings.
- After discussing with the client, we finalised a set of approximately 30 companies operating in the Financial Payments space and prepared a strip profile for each company.

For the approximately 30 shortlisted companies, the RocSearch team prepared strip profiles, capturing their size, core product and service offerings, focus areas, end markets served, revenue split by geography and segments, and recent developments.



Image by jannoon028 Source: Freepik

- The team categorised the services offered by these shortlisted companies under different segments such as BNPL, PSP (traditional or digital), B2B payments, Diversified Fintech, GDS, and card schemes.
- We also mapped the industries to which they catered (e.g., retail, travel, banking, etc.).
- We captured financial data covering revenue split by geography and segments.

# Business outcomes

- The client gained a comprehensive understanding of the market leaders and their core capabilities in the global Financial Payments sector.
- The client's investment team used the outputs provided by RocSearch to build their investment hypothesis for the global B2B Financial Payments sector.
- As an additional, the client was also made aware of the payments market leader within each geography and each segment.

Insights provided by the RocSearch team enabled the client to analyse key players in the market and build their investment hypothesis.

## About RocSearch

Founded in 1999, RocSearch has been a pioneer in empowering our clients to overcome challenges and realize their goals. Our strength is delivering research and advisory solutions through managed and dedicated teams that produce the expert intelligence our clients require to gain a true competitive advantage.

We draw on proven expertise to deliver consistent value across all types of business requirements: ranging from digitization and analysis of business, financial, or customer data to the provision of 'act-on' insights for the most challenging business problems.

Our longstanding client relationships bear testament to the enduring value we create, alongside our consistent reliability and absolute discretion. We take great pride that many of the brightest global companies rely on us to help them achieve top-line growth, operational efficiency and increased profitability.

[www.rocsearch.com](http://www.rocsearch.com)



Feel free to reach out to us:

**Business enquiry:** [enquiry@rocsearch.com](mailto:enquiry@rocsearch.com)

**General enquiry:** [info@rocsearch.com](mailto:info@rocsearch.com)

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