

EGP

EVLI
GROWTH
PARTNERS

UNDERSTANDING THE MARKET AND MARKET ESTIMATIONS



FEB 1, 2024

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ASSOCIATE PARTNER



What have I been up to.

←
M.SC (TECH)



→
STARTUP



→
VC



EGP

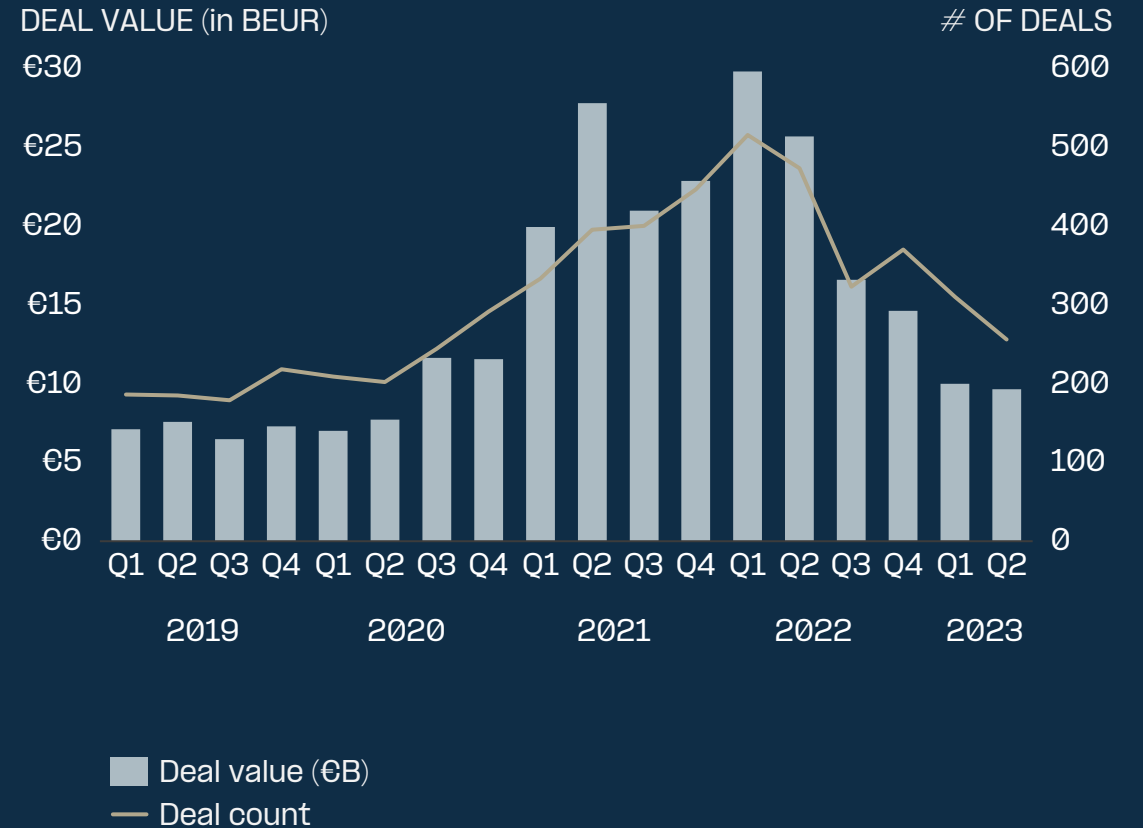
EGP is a venture capital company that invests in and partners with the most beautiful European growth-phase technology companies. EGP has a 300 M€ funding program and it invests in Series B+ growth companies.

At EGP, we are on a mission to accelerate the most beautiful growth companies with world-class resources to do more good. Brilliant inventions and responsible businesses deserve to grow. The more these companies grow, the better the world becomes.



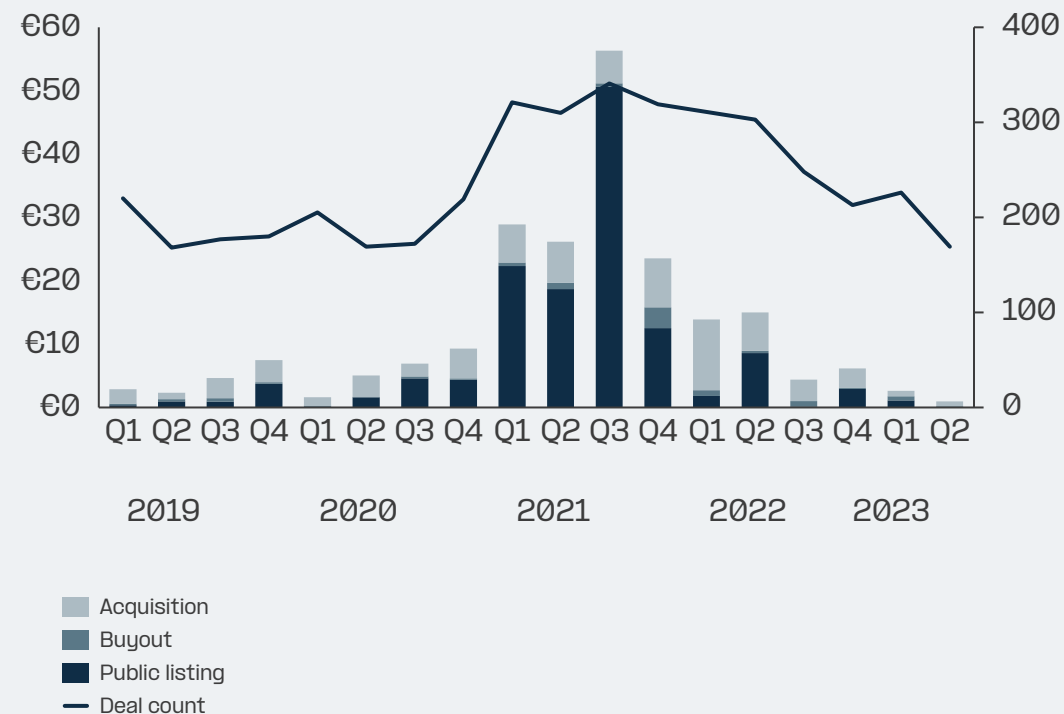
We are experiencing the biggest market corrections in a long time

of VC deals and total deal value per quarter in Europe.



We are experiencing the biggest market corrections in a long time

IPO activity at its lowest in a decade in Europe (and globally)



02

WHY WOULD YOU RAISE
MONEY FROM A VC FUND?

Main reasons to get an investment from a VC?

NETWORK

EXPERTISE

"STATUS"

CASH

How do we make
money?

BUY LOW, SELL HIGH*

*in the end there will always be a liquidation event
(M&A, IPO, bankruptcy)

What does this mean to your company?

What does this mean to your company

01 Get the idea of the scale & size
you need to reach.

02 Understand which companies
will get the follow-on
investments

03 The companies will always be
exited.

03

WHAT DO WE LOOK FOR?

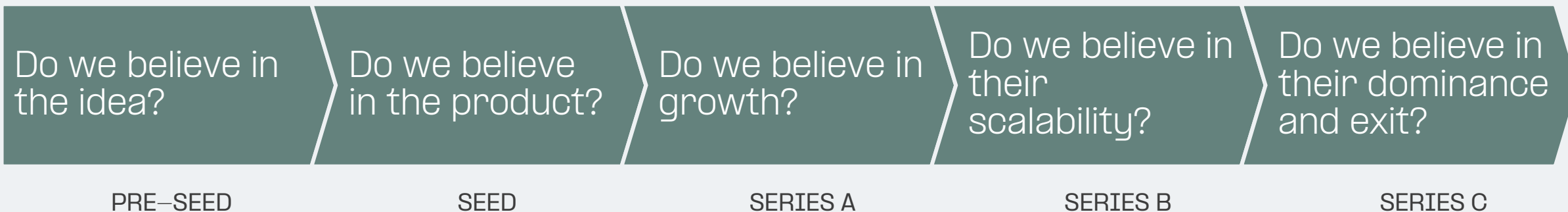
The mega-growth drivers

01 Stellar team

02 Large and attractive market

03 Loveable and scalable product

Main emphasis between different stages



How do you hack the system?

04

HOW TO MAKE SENSE OF THE MARKET?

Sizing the market

TOP-DOWN APPROACH

BOTTOM-UP APPROACH

Identify the total market.

01

Identify target customer

Determine the market share

02

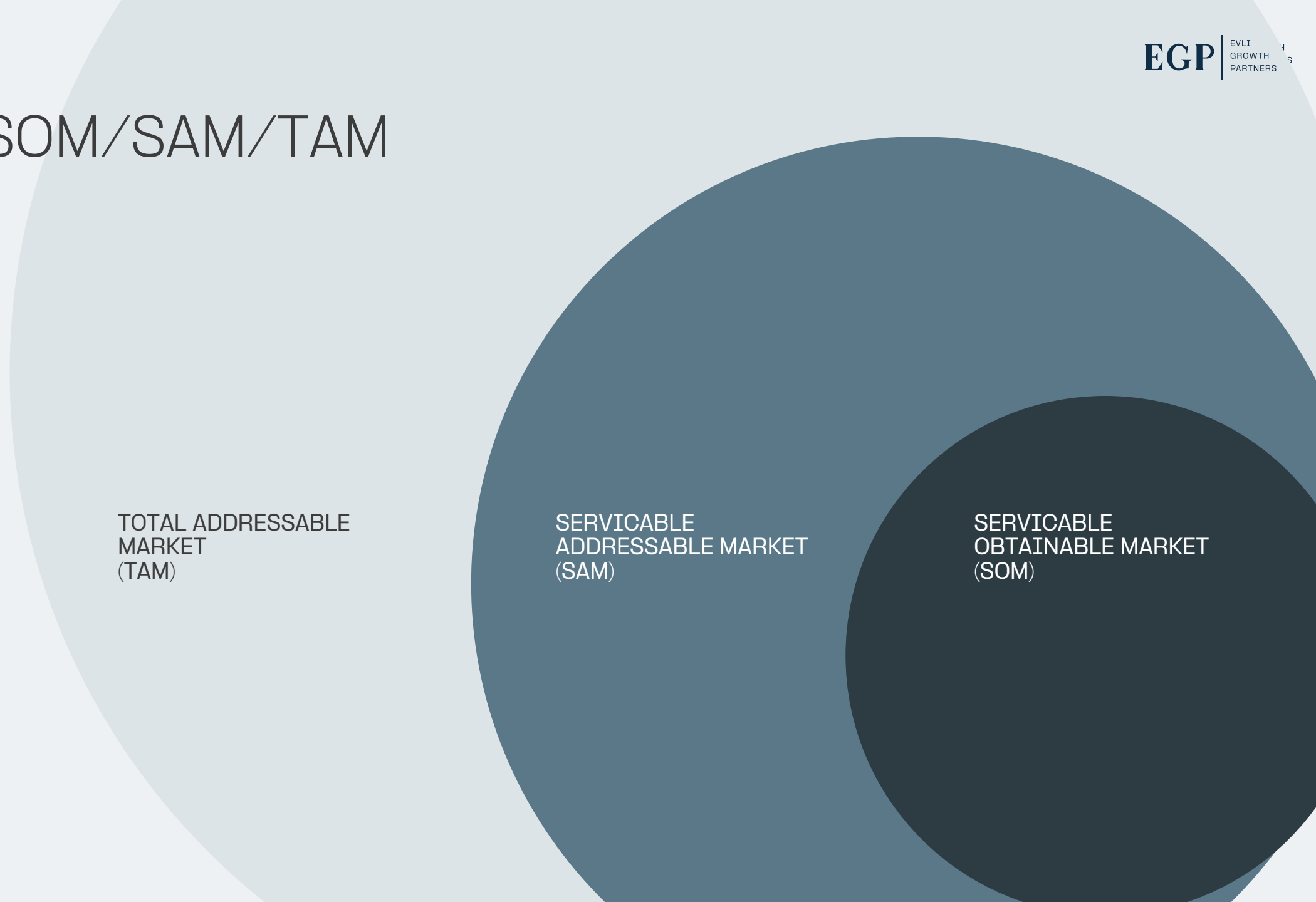
Estimate total consumption

Calculate potential market size

03

Calculate the revenue

Defining SOM/SAM/TAM



TOTAL ADDRESSABLE
MARKET
(TAM)

SERVICABLE
ADDRESSABLE MARKET
(SAM)

SERVICABLE
OBTAINABLE MARKET
(SOM)

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The screenshot displays the Perlego website interface. At the top, there is a search bar with the Perlego logo and a magnifying glass icon. Below the search bar are several filter buttons: "Books" (highlighted in blue), "Topics", "Reading Lists", and "Publishers". There are also dropdown menus for "English", "Search by", "Publication date", "Topic", "Publisher", "Author", and "Format". A "Sort by:" dropdown is visible on the right side of the page.

The main content area features a grid of book covers. A modal window is overlaid on the left side of the grid, displaying the title "Chapter 1" and the subtitle "Introduction". The modal contains a list of horizontal bars representing text, with some bars highlighted in green, yellow, and purple. At the bottom of the modal, there is a chat icon and a row of six colored circles (orange, red, pink, purple, blue, green).

Visible book covers include:

- Data Science with Python
- POLYMER ENGINEERING
- Neutralization and World Politics
- Classic Computer Problems in Python
- THE HISTORY OF MATHEMATICS
- HBR'S MUST READS: On AI, Analytics, and the New Machine Age
- ADAPTIVE MARKETS
- THE POPULIST EXPLOSION
- FINTECH: The New DNA of Financial Services

Who is your ICP?

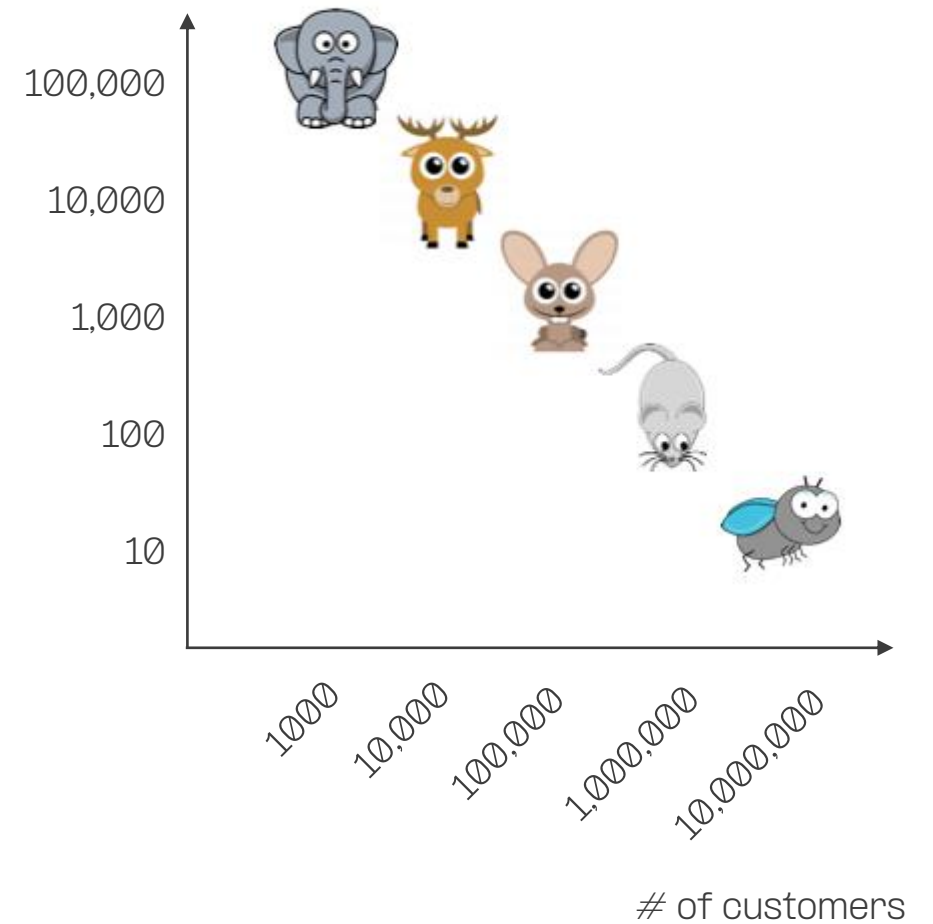
“The hypothetical customer who would get the most value out of your product”

THINK ABOUT:

Demographics, geography, socioeconomics, psychographics, behaviors, pain points

"5 ways to build a €100m business"

ARPA
(in € per year)



Expanding your markets

UPSELL TO
EXISTING
CUSTOMERS

NEW
CUSTOMER
SEGMENTS

EXPAND TO
NEW
GEOGRAPHIES

THANK YOU



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