



## Capital Markets

Financing alternatives via Capital Markets



## youmex group


... simplifies, accelerates and optimizes financing and capital market transactions

Our specialists have been developing individual total financing solutions in the financial center of Frankfurt am Main under the youmex brand for more than 20 years.

### Our Services

- ▶ **Financing platform and one-stop-shop for all capital classes:** youmex optimizes and accelerates transactions in all capital classes - initial public offerings (IPOs), capital increases, segment changes, listings, mandatory takeover offers, delistings (going private) as well as issues of SME bonds.
- ▶ **Alternatives to classic bank financing:** alternative and supplementary bank financing and optimization of the balance sheet financing mix
- ▶ **Capital for medium-sized companies:** In the Capital Markets business segment, youmex organizes the raising of capital for small and mid caps from 50 to 500 million euros in sales or market capitalization as a transaction and issue manager.
- ▶ **Management of the complete process chain:** With the involvement of reliable partners, youmex manages the complete process chain of a capital market transaction. Conception, structuring, preparation, due diligence, valuation, financial analysis, compilation of the syndicate, prospectus, IR, PR, placement, stock exchange listing or listing, trading and price maintenance - from a single source.
- ▶ **Extensive track record:** over 70 successfully supported transactions under the brandmark youmex speak for comprehensive expertise

Februar 2013



KTG Agrar AG

**Aufstockung um  
EUR 80.000.000**  
Inhaberschuldverschreibung II

Lead Institutional Sales

November 2012

**RENÉ LEZARD**

René Lezard

**EUR 15.000.000**  
Inhaberschuldverschreibung

Sales Agent

September 2012



KTG Energie AG

**EUR 25.000.000**  
Inhaberschuldverschreibung

Sales Agent

Juni 2012



Steilmann-Boecker Fashion Point GmbH & Co. KG

**EUR 25.600.000**  
Inhaberschuldverschreibung

Lead Manager

April 2012



Mitec Automotive AG

**EUR 23.750.000**  
Inhaberschuldverschreibung

Sales Agent

März 2012



Singulus Technologies AG

**EUR 60.000.000**  
Inhaberschuldverschreibung

Sales Agent

## Core Competencies

youmex accompanies all  
capital market activities of  
high-growth and  
established companies

Februar 2012



MT Energie GmbH

**EUR 10.000.000**  
Inhaberschuldverschreibung

Sales Agent

Februar 2012



Scholz AG

**EUR 150.000.000**  
Inhaberschuldverschreibung

Sales Agent

Juli 2011



S.A.G. Solarstrom AG

**EUR 25.000.000**  
Inhaberschuldverschreibung II

Lead Manager

Dezember 2010



S.A.G. Solarstrom AG

**EUR 25.000.000**  
Inhaberschuldverschreibung

Lead Manager

Oktober 2010



Windreich AG

**EUR 50.000.000**  
Inhaberschuldverschreibung

Sales Agent

Oktober 2010



Schneekoppe

**EUR 10.000.000**  
Inhaberschuldverschreibung

Sales Agent

### Focus

youmex supports listed and unlisted companies with sales revenues or a market capitalization of 50 to 500 million euros that are capital market-ready (small and mid caps).

### Ticket sizes and jurisdictions

Our financing tickets on an equity basis comprise financings or capital market measures of 10 to 100 million euros, on a debt basis of 25 to 250 million euros. In this business segment youmex basically does not exclude any industry. The companies should be based in Western Europe, especially in Germany, Austria and Switzerland.

### Requirements for capital markets

Investors not only look at past business performance, they also analyze future developments. Regardless of whether a company is aiming for an initial public offering (IPO) or planning a corporate bond, certain requirements must be met.

These include the following criteria in particular for companies raising capital publicly for the first time:

- ▶ Proven business model
- ▶ Stable cash flow
- ▶ Management experienced in the industry and willing to be transparent with the public
- ▶ Fulfillment of the transparency criteria of the respective market segment
- ▶ Growth potential
- ▶ Competitive advantages
- ▶ Good prospects for the future in the long term

## Range of services

youmex is a reliable capital markets partner for medium-sized companies for all relevant services



Together with reliable and experienced partners, youmex organizes the complete process chain of capital market transactions. This includes:



for the following transaction types:

- ▶ IPOs
- ▶ Bond issues
- ▶ Segment changes (uplifts)
- ▶ Listings
- ▶ Capital Increases
- ▶ Going Private / Delisting
- ▶ Mandatory takeover offers

In doing so, the protection of the interests of the company, the shareholders and the management vis-à-vis creditors and future shareholders is ensured at all times. youmex is independent of third-party interests.

### Transaction Management

As a transaction manager, youmex coordinates all parties involved on the way to a successful capital market measure. With a holistic approach, youmex supports companies in the run-up to the transaction with preparatory measures with regard to capital market readiness and also afterwards as a reliable and experienced partner. Within the scope of transaction management, youmex accompanies the following measures:

- ▶ Preparatory measures
- ▶ Putting together bank syndicates
- ▶ Stock exchange admission procedure
- ▶ Developing and elaborating the equity story
- ▶ Rating and company valuation
- ▶ Due Diligence
- ▶ Prospecting
- ▶ IR- and PR-Measures
- ▶ Marktsounding / Pre-Sales
- ▶ Road Shows
- ▶ Placements / Sales
- ▶ Trading and Market Making

### Capital Markets Advisory

The implementation of a capital market transaction is a complex process and requires comprehensive capital market advice. For the preparation and successful implementation of a capital market transaction, such as an IPO or the issuance of a bond, we support the issuer in the preparation, implementation and also after the capital market transaction. The basic prerequisite for this is that the issuer is ready for the capital market. We assist you in establishing the technical and commercial readiness for the stock market in the following stock market segments:

- ▶ EU-regulated market (Regulated Market) with the "General Standard" and "Prime Standard" segments
- ▶ Exchange-regulated market of the Frankfurt Stock Exchange with special expertise for the accompaniment in the segments Scale, Scale for Corporate Bonds, Quotation Board, Basic Board, Green Bonds and REITS

### Institutional Sales

The Institutional Sales unit focuses on assisting and arranging securities placements of medium-sized companies and medium-sized groups with:

- ▶ IPOs
- ▶ Bonds
- ▶ Secondary Emissions
- ▶ Capital Increasing Measures
- ▶ Block Trades

We organize issuer roadshows for institutional investors (institutional sales) as well as semi-institutional investors such as family offices in Germany and other European countries. To these investors youmex places the securities via approved financial service providers. The distribution of securities to private investors is carried out by linking direct banks and branch banks as retail brokers in the respective syndicate. youmex acts as transaction manager of the placement syndicate for bond issues and IPOs as well as for re-placements of shares and capital increases to investors. In the fixed income segment, youmex acts as placement coordinator and organizes the sales force to place bearer bonds, convertible bonds and profit participation certificates

### Securities-Services

The youmex group infrastructure can also be used to offer the securities services required for issues and exchange trading, such as:

- ▶ Structuring and creation of (convertible) bonds, profit participation certificates, funds, certificates and other structured products
- ▶ Application of Security identification numbers (WKN / ISIN)
- ▶ Collective safe custody, technical stock exchange maturity
- ▶ Provisioning of paying and depository agents
- ▶ Securities transfers via XETRA, XONTR0, Clearstream, OTC
- ▶ Clearing and settlement

In doing so, youmex focuses on the special needs of medium-sized businesses. The right partners can be selected from the partner portfolio for the above-mentioned securities services - also with regard to the appropriate size and price model.

## Benefits

### Capital market experienced issue consultant (Central contact person)

youmex is the link between the issuer and the various parties involved in an issue. youmex supports the issuer during the preparation, the implementation and also after the public offering. In addition, youmex structures the transaction, takes over the coordination of the entire process and uses an excellent network to investors, financial services institutions and syndicate banks.

### Placement Power

Due to its strong links with institutional investors, youmex is able to organize a swift and efficient placement of securities.

### Marketsounding

Anonymized market sounding makes it possible to obtain initial (price) indications and opinions on the attractiveness of a security from institutional investors before the actual placement of securities. This usually makes a capital market transaction safer and helps to find the right pricing, which can lead to substantial cost savings for the issuer..

### Access to all capital classes

The challenge is to find the right mix of equity, mezzanine and debt capital. In this process, youmex's clients also benefit from its expertise in corporate finance. Here, preparatory measures for a successful capital market presence are arranged.

### Capital markets readiness

Even before a company makes use of capital market financing, youmex analyzes companies with regard to their capital market readiness and develops strategies for achieving capital market readiness.

### Capital Markets Partner

Since 2005, our specialists have been advising medium-sized companies and groups under the youmex brand with expertise for the Prime Standard, General Standard, Scale, Scale for corporate bonds, Quotation Board, Basic Board, Green Bonds and REITS segments of Deutsche Boerse.

# The next step to youmex

Corporate growth  
via capital markets

Contact us now

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