

## CHARLESBANK TECHNOLOGY INVESTING INITIATIVE

Based in Boston and launched in 2019, Charlesbank Capital Partners' technology investing initiative was formed to make equity investments in technology companies.

Charlesbank invests in both control and minority investments, buyouts and recapitalizations, and consolidations within its target sectors.

### THE FIRM

Founded in 1998, Charlesbank is a middle-market private investment firm with more than \$7 billion of capital under management. The firm focuses on management-led buyouts and growth capital financings and invests across a range of industries, supporting management teams in building businesses, primarily in the United States. Charlesbank also engages in opportunistic credit and technology investments.

### INVESTMENT PARAMETERS

**TYPICAL ENTERPRISE VALUES**  
\$50M – \$300M

**TRANSACTION TYPES**  
Primarily control-oriented

**GEOGRAPHIC FOCUS**  
Based in, or with revenue sourced from, U.S. or Canada

### KEY CRITERIA

- Well-established products and business models
- Predictable financial profiles with recurring/reoccurring revenue
- Attractive and sustainable unit economics
- Strong and defensible competitive positions
- Proven core executive teams
- Multiple levers to accelerate value creation

### CURRENT INVESTMENTS



**Aptean**  
Enterprise resource planning software



**Cyberbit**  
Cloud-based cybersecurity training and simulation



**DoiT International**  
Public cloud operations software and expertise



**HelpSystems**  
Infrastructure management software for IT departments



**WolfePak Software**  
Oil and gas accounting solutions

### TARGET SECTORS



**Enterprise software**



**Cybersecurity**



**Infrastructure software**



**Cloud computing**



**Financial technology**



**Healthcare IT**



**Internet and e-commerce**



**Tech-enabled services**



**Data and analytics**



**Industrial technology**

### INVESTMENT TEAM

**Hiren Mankodi**  
Managing Director

**Darren Battistoni**  
Managing Director

**Mayur Desai**  
Principal

**Bhuvan Jain**  
Senior Vice President

**Dhruva Kaul**  
Vice President

**Michael Zirngibl**  
Vice President

**Sam Berger**  
Associate

**Nicolò Carrara**  
Associate

**Tanay S. Nandgaonkar**  
Associate

**Jonathan Page**  
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