



Press deck



Chartered
Banker

CISI
CHARTERED INSTITUTE FOR
SECURITIES & INVESTMENT

About Finance Unlocked

The future of financial learning

Finance Unlocked is the world's first comprehensive, on-demand video-delivered learning platform built specifically for finance professionals.

We have institutional clients including the world's leading banks, asset managers, law firms and business schools, and a user base of **12,000 across 85 countries**.

Finance Unlocked **demystifies the full breadth and depth** of finance via on-demand videos, supported by examples, tests and real-world case studies.

Our content is curated and created by Finance Unlocked and presented by **100 leading industry practitioners** and delivered on a proprietary on-demand platform, with **video engagement rates at 91%**.

The future of financial learning

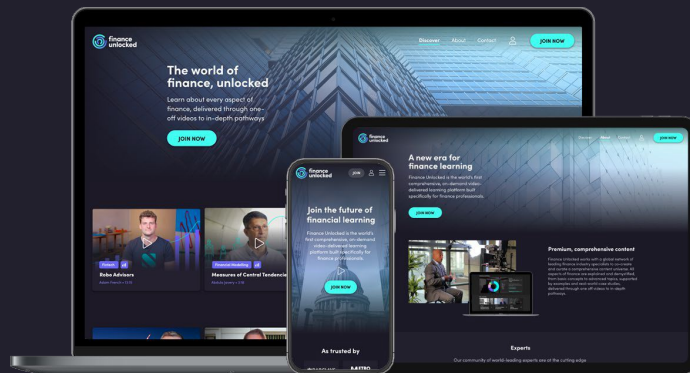
What the world is saying about us...

“This is **Netflix** for **financial learning**.”

UK CEO, Top 5 Global Asset Manager

“As someone who is dyslexic, this is a **dream come true**. You don't often get something that's educational, interesting and extremely **easy to consume**.”

Associate Director, UK's largest bank



“I'd like to thank you again for such an **empowering opportunity**, I still can't believe my eyes that a platform like yours actually exists.”

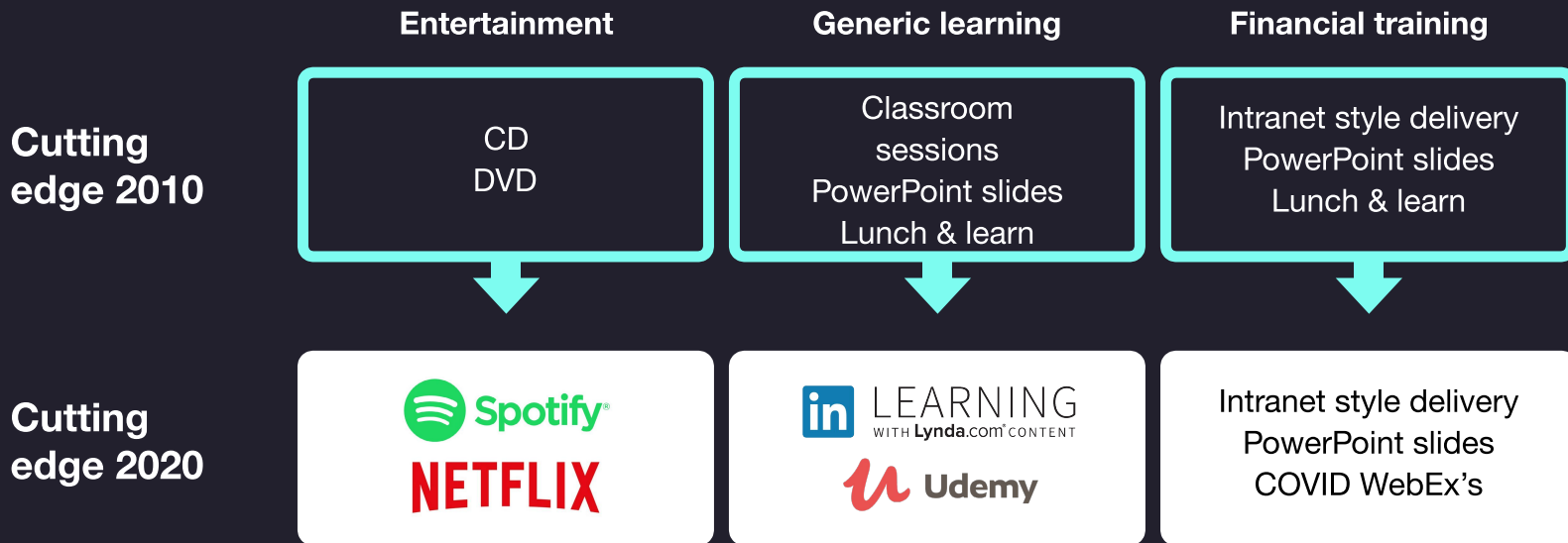
Bocconi Finance student

“The Finance Unlocked team are building the **future of education** and training in banking and financial services.”

Simon Thompson, CEO, The Chartered Banker Institute

The problem

Financial training has lagged behind the market



The demand

Demand for quality financial training has never been higher



Management expectations

Almost 80% of 235 Banking and Markets CEOs see skills shortages as a threat to their growth prospects.

[PwC Banking and Capital Markets Trends 2019 Report](#)



Employee expectations

70% of employees report they do not have mastery of the skills they need for their jobs.

[Raconteur, 2020](#)



Shareholder expectations

Companies that offer comprehensive training enjoy a 24% higher profit margin.

[ASTD](#)



Gov & Regulator expectations

FCA has implemented new requirements for CPD under SMCR. Financial Services Skills Commission established to address this exact problem.

[TheCityUK Report, 2020](#)

Evidence:

NedBank - Increased learning 10x in 2019

[LinkedIn 2019](#)



Management action

Evidence:

Lloyds Bank to increase staff training by 50% to 4.4 million hours per year

[Lloyds Banking Group GSR3 2018 Report](#)

The market

\$44B

Professional finance education market¹

Finance Unlocked's market size

\$2.1B

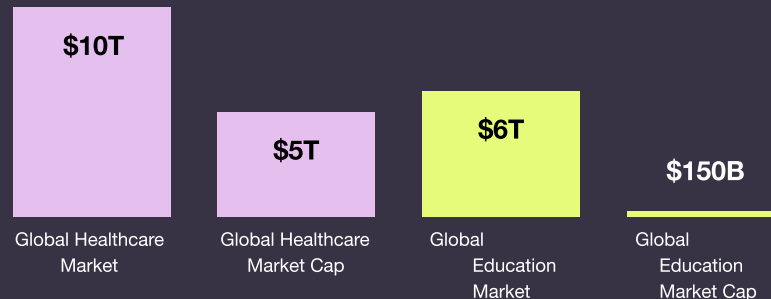
UK Professional finance education market²

Finance Unlocked's UK market size

Why is this exciting?

- Less than 3% is digitised
- Education previously starved of capital

Case study: Healthcare vs Education Capital Flows³



1. [Research Markets, 2019](#) \$370B x [LinkedIn 2019](#), 12% finance related staff, 2. Finance Sector + Large Corporate Finance Department Staff + Students: [1.1m finance industry workers in the UK ([The City UK, 2020](#)), £1,300 average L&D spend per finance employee ([Department for Education, 2018](#)), 100,000 finance-related staff in UK large corporates (Estimate), £1,500 L&D spend per UK large corporate employee ([Department for Education, 2018](#)), 343,000 UK higher education students studying Finance-related degrees ([HESA, 2019](#)), £100 per student spent by University careers departments ([Debut, 2020](#))], 3. [Holon IQ, 2020](#)

COVID-19: Accelerating the opportunity

Strategy flipped on its head

94%

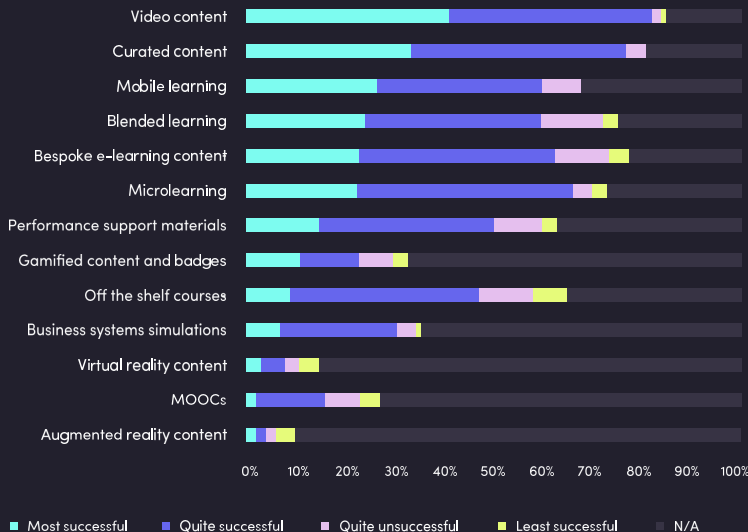
of Learning Leaders say their strategy has changed forever as a result of COVID-19

Senior demand for digital learning is surging

82%

report that demand for digital learning has increased from senior stakeholders

Video content at the forefront



Video content is the highest rated in supporting organisations throughout the COVID-19 crisis, whilst traditional e-learning shows signs of waning both in terms of adoption but significantly in terms of perceived success.

[Fosway Group COVID-19 Research Report](#)

Our solution



Finance Unlocked is the world's first comprehensive, on-demand video-delivered learning platform built specifically for finance professionals.

Play intro video

Watch sample videos



Premium quality



Comprehensive



Expert



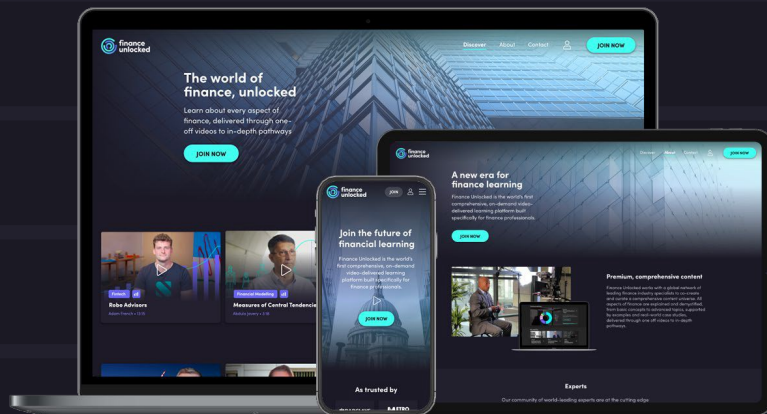
On-demand video



User centric



Value for money

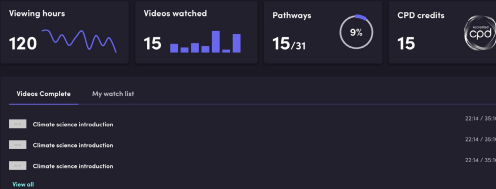


Expert and accredited learning



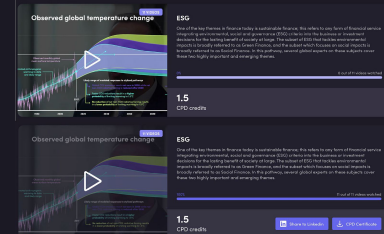
Expertly delivered

With **100+ contributors** from **20 countries** representing over **1000 years' experience**, our expert network is already market-leading



Analytics

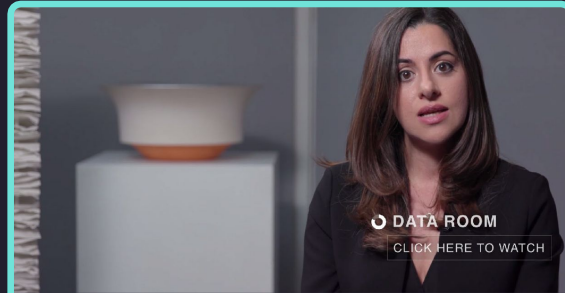
Enables managers to track and log employee engagement for **measuring ROI** and **regulatory reporting purposes**



Learning pathways

Our curated Pathways offer a directed learning experience by guiding users through a particular area of finance

Production and post production values are best in class



Advanced functionality

User engagement is **greatly increased** through clickable **hotspot** functionality

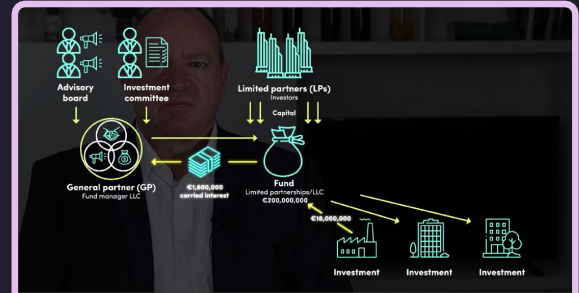


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Accreditation and endorsement

Accredited by **world leading financial institutes** for continuous professional development



Graphically animated

Production and post production values already **market-leading**

Story so far

Content

550

videos filmed

100

experts onboarded

35

learning pathways

Usage

85

countries

12k+

users

91%

video completion rate

Partnerships



Launch date

Sep 2020

Launch date

Sep 2020

Commercial resellers

Commercial partnerships established locally and globally with the biggest names in the business



Launch date

Oct 2020

Launch date

Oct 2020

Learning aggregators

Aggregator behemoths Cornerstone (75M users and \$818M revenue) and Open Sesame to house Finance Unlocked content and sell directly to their user base



Chartered Banker

Launch date

Feb 2020

Launch date

Feb 2020

Content partners

Accredited, endorsed and content collaborations with world leading finance institutes

Social impact contribution

Project Cobra

In response to University and Business School closures due to COVID-19, we opened our platform free to students affected a week prior to lockdown until Sept 2020

Results

- 8,400 signups
- 4,000 hours consumed
- 56:44 finance:non-finance related degree signups
- 97% of survey respondents said help prepare them for a career in finance

Social impact contribution = £3.1M (£365 x 8,400)

Fintech for schools

A key partner in the Innovate Finance Fintech for Schools initiative helping to educate future talent on one of the UK's fastest growing sectors.

The initiative comprises a mobile app developed by **Deloitte** and packed with relevant FinTech content produced by **Finance Unlocked**, **Revolut**, **Makers**, **Santander UK**, **Pinsent Masons** and **gohenry**. The app will be distributed to final year students in all UK schools.

Social impact contribution = £200K

INNOVATE|FINANCE



What our learners are saying

Rated "Excellent" (4.8/5) by TrustPilot



Pathways



Premium quality



Expert contributors



Accredited



5 days ago

Very useful platform!

...The fact that the videos increase in difficulty is perfect for me and the tests at the end of pathways were a great way to ensure I had taken on all the information.

Katie



8 days ago

Slick, informative and extremely useful platform

...The production quality is amazing, explanations are clear, and the videos go from basics to in-depth very smoothly...

Bradley



2 days ago

An Interactive Platform

...Having industry experts explaining key concepts such as Libor, Commercial Papers, Convertible bonds, liquidity or LBOs is invaluable.

Adrian



4 days ago

A must have for anyone wanting a career in finance

...I use the pathways function to learn about a topic from scratch. Once completed, I can then put then pathway on my CV and LinkedIn to really help me stand out in job applications

Programmes and Awards

Programmes



AG Elevate

Selected as 1 of 5 Fintechs for top 10 UK law firm Addleshaw Goddard's accelerator programme



London & Partners

Selected in Autumn cohort on the London & Partners Business Growth Programme funded by the London Mayor's programme



WeWork Labs

Member of WeWork labs, with office space benefits for high-growth start-ups



Educate

Selected onto the 2020 Educate programme in collaboration with EU and University College London to specifically accelerate EdTechs



Silicon Valley Bank Accelerator

Selected onto the SVB and London Growth Hub Programme for high growth start-ups



KPMG & Central Research Lab

Selected onto KPMG and Central Research Laboratory's early stage investment programme

Awards



Fintech 100

Pitched and won the judges and audience vote for the UK leg of Fintech Abu Dhabi's global digital tour and joining the illustrious Fintech 100

Senior leadership



Henry White

Chief Executive Officer,
Co-founder

11 years of high growth start-up
and investment experience



Robert Ellison

Chief Commercial Officer,
Co-founder

20 years of banking and
markets experience



Prasad Gollakota

Chief Content Officer

Over 20 years experience in
financial services, now on the CFA
content steering committee



Ciaran Rooney

Chief Technology Officer

15 years of technology leadership
experience in high growth startups

More about our Co-founders



Henry White
Chief Executive Officer,
Co-founder

12 years of high growth start-up
and investment experience

Henry is a hedge fund analyst turned tech entrepreneur, successfully launching 3 companies to market, 2 of which are high growth tech companies; Pixoneye which sold a Fintech solution, reaching Series B with Octopus Ventures; Head of Marketing at social messaging app Yubl, where he was responsible for delivering 1.4M downloads in the UK in just 8 months.



Robert Ellison
Chief Commercial Officer,
Co-founder

20 years of banking and
markets experience

Robert is a senior investment banker with 20 years of front-line experience at UBS and then Lloyds. Rob has experience of delivering financial education (physical lectures “off the side of his desk”) to upwards of 800 colleagues in his last role at Lloyds. Rob also served on Lloyds’ Learning & Development procurement committee where he got a very clear view of the learning landscape for finance professionals, and how it can be improved.



Thank you

Contact: henry.white@financeunlocked.com

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