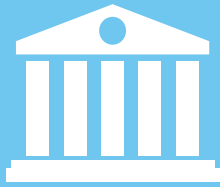




NATIONAL CENTER FOR
THE MIDDLE MARKET

FINANCIAL SERVICES MIDDLE MARKET INDICATOR

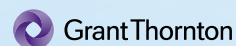


4Q | 2017

IN COLLABORATION WITH



THE OHIO STATE UNIVERSITY
FISHER COLLEGE OF BUSINESS



Financial Services' Revenue Growth vs. National

8.2%

FINANCIAL SERVICES' MIDDLE MARKET GROWTH OVER THE PAST 12 MONTHS

7.6% Past 12 Months National

5.0%

FINANCIAL SERVICES' MIDDLE MARKET GROWTH OVER THE NEXT 12 MONTHS

5.4% Next 12 Months National

Financial Services' Employment Growth vs. National

4.1%

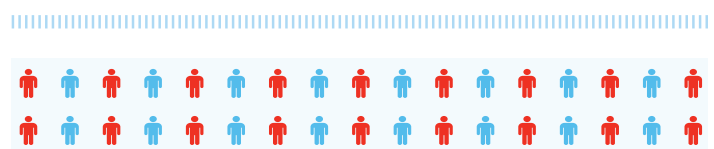
FINANCIAL SERVICES' MIDDLE MARKET GROWTH OVER THE PAST 12 MONTHS

5.2% Past 12 Months National

2.6%

FINANCIAL SERVICES' MIDDLE MARKET GROWTH OVER THE NEXT 12 MONTHS

3.7% Next 12 Months National



Financial Services' Top Internal Challenges Over The Next 3 Months



STAFF/EMPLOYEES

60%



BUSINESS GROWTH

33%



FINANCIAL

25%

VS. NEXT 12 MONTHS

STAFF/EMPLOYEES
49%

COSTS
27%

BUSINESS GROWTH
19%

Preparing for Growth Through Capital Investment

OVER HALF OF MIDDLE MARKET COMPANIES IN FINANCIAL SERVICES ARE POISED TO INVEST.

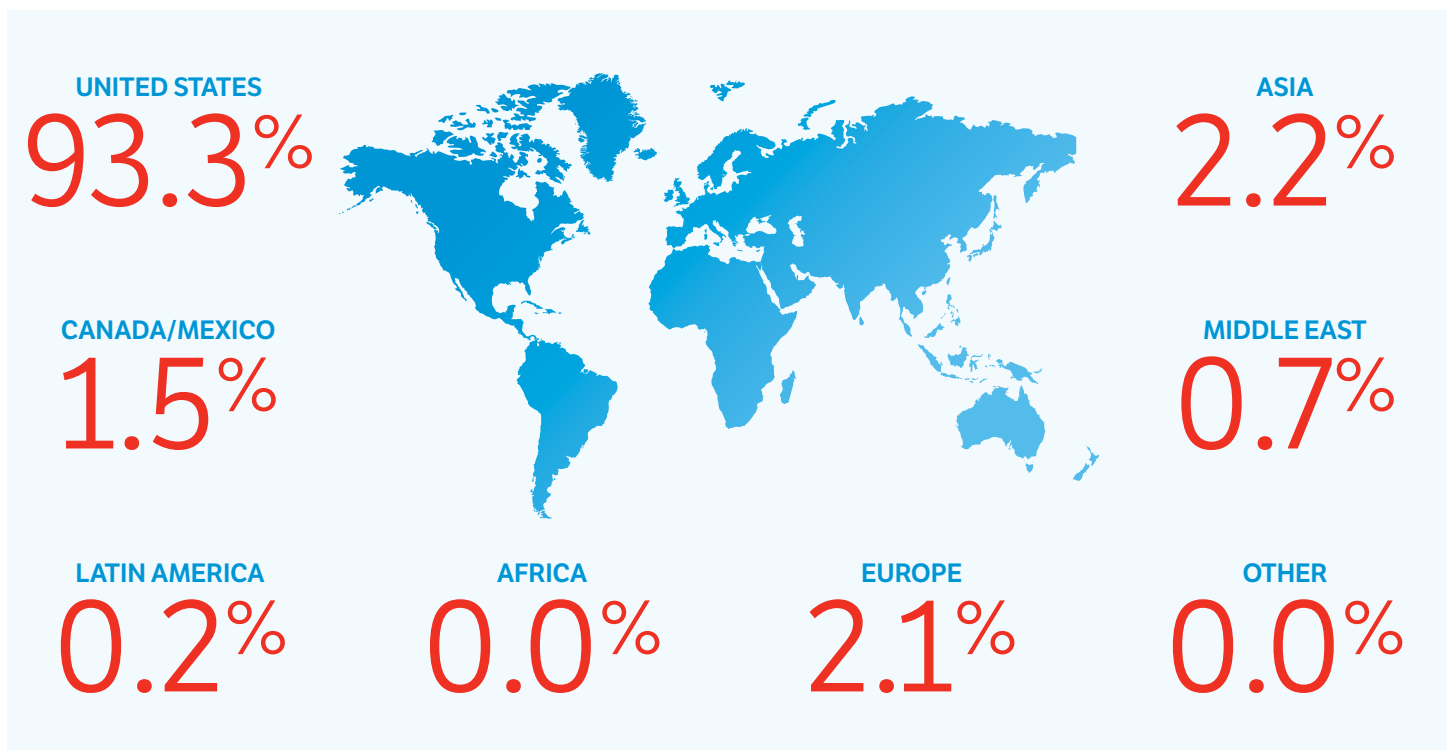


Financial Services' Middle Market Defined



Source: 2014 D&B Data

Financial Services' Percentage of Revenues Around the World



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