



2019 HOLDING COMPANY M&A LEAGUE

GLOBAL

June 2019

YoY %

YTD Deal Value (US\$M)

13,660

46%

YTD Deal Count

235

18%

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$M)	NO. OF DEALS
1	1	Publicis Groupe	Blue 449 (remaining stake), Epsilon	4470	2
2	2	Accenture	Hjaltelin Stahl, Storm Digital, ?What If!, Droga5, Shackleton	651	5
3	-	CVC Capital Partners	Teneo	350	1
4	3	Dentsu	Filter, Happy Marketer, BJL, Comunica+A, Redder Advertising, Re:Production	253	6
5	4	Stagwell Group	MDC Partners, Multiview	240	2
6	5	Cision	TrendKite	225	1
7	6	DMI	Pragiti	210	1
8	7	CM Group	Sailthru, Liveclicker, Vuture	188	3
9	-	Hexaware Technologies	Mobiquity	182	1
10	8	Pareteum	Devicescape	182	1
11	9	Deloitte	Pervorm	182	1
12	10	Taptica	RhythmOne	176	1
13	-	SEC	Porta	168	1
14	11	You & Mr Jones	Inside Ideas Group (Incl. Oliver)	158	1
15	12	Validity	Return Path	154	1

METHODOLOGY

To compile this table, R3 reviews all public sources for M&A news across all marketing and media sectors on a monthly basis. The complete table covers all individual acquisitions, more than can be featured in this summary report.

R3 applies a consistent multiplier to the estimated revenue of all agencies acquired based on the reported percentage required.

Regardless of earn out terms, R3 assumes full sale amount of acquisitions at time of sale.

For more details, write to greg@rthree.com.



2019 HOLDING COMPANY M&A LEAGUE

NORTH AMERICA

June 2019

YTD Deal Value (US\$M)

10,338

YoY %

57%

YTD Deal Count

135

26%

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$M)	NO. OF DEALS
1	1	Publicis Groupe	Epsilon	4400	1
2	-	CVC Capital Partners	Teneo	350	1
3	2	Accenture	Droga5	280	1
4	3	Stagwell Group	MDC Partners, Multiview	240	2
5	4	Cision	TrendKite	225	1
6	5	DMI	Pragiti	210	1
7	6	Pareteum	Devicescape	182	1
8	-	Hexaware Technologies	Mobiquity	182	1
9	7	Taptica	RhythmOne	176	1
10	8	Validity	Return Path	154	1
11	-	LiveRamp	Data Plus Math	150	1
12	9	Altamont Capital Partners	Publicis Health Solutions	140	1
13	10	CM Group	Sailthru, Liveclicker	125	2
14	11	McDonald's	Dynamic Yield	123	1
15	12	Informatica	AllSight	92	1

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2019 HOLDING COMPANY M&A LEAGUE

EMEA

June 2019

YoY %

YTD Deal Value (US\$M)

2,645

51%

YTD Deal Count

68

26%

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$M)	NO. OF DEALS
1	1	Accenture	Hjaltelin Stahl, Storm Digital, ?What If!, Shackleton	371	4
2	2	Deloitte	Pervorm	182	1
3	-	SEC	Porta	168	1
4	3	You & Mr Jones	Inside Ideas Group (Incl. Oliver)	158	1
5	4	Dentsu	BJL, Comunica+A, Re:Production	156	3
6	5	Outbrain	Ligatus	108	1
7	6	Paragon Group	Celerity Information Services, ORM, Graft Services	108	3
8	7	Webedia	Quill	92	1
9	8	AVENIR GLOBAL	Hanover	92	1
10	9	UDG Healthcare	Incisive Health	89	1
11	-	Welocalize	SearchStar	77	1
12	10	Publicis Groupe	Blue 449 (remaining stake)	70	1
13	11	CM Group	Vuture	63	1
14	-	Jungle Creations	Goat Agency	62	1
15	12	Jellyfish	Latitude	62	1

METHODOLOGY

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2019 HOLDING COMPANY M&A LEAGUE

ASIA PACIFIC

June 2019

YoY %

YTD Deal Value (US\$M)

649

-29%

YTD Deal Count

31

-11%

RANK THIS MONTH	RANK LAST MONTH	HOLDING GROUP	RECENT ACQUISITIONS	TOTAL DEAL VALUE (US\$M)	NO. OF DEALS
1	1	KPMG	Love Agency	70	1
2	2	Havas Group	Think Design	62	1
3	3	Dentsu	Happy Marketer, Redder Advertising	56	2
4	4	Hotwire	Precinct	56	1
5	-	I-ON Communications	H9Pitch	45	1
6	-	Miaozhen Systems	RadioBuy	42	1
7	5	AdGeek	The Studio by CtrlShift	32	1
8	6	Accel-KKR	Collabspot (Email Tools)	22	1
9	7	Advent International	Popcorn Global	20	1
10	8	Chello	Digillante	20	1
11	9	Gushcloud	DSTNCT	17	1
12	10	Affle	Shoffr	17	1
13	11	Adjust	Unbotify	17	1
14	12	Aarav Solutions	NEXwhaT Consulting Services	17	1
15	13	Echo Myanmar	RevoTech	17	1

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YoY %

YTD Deal Value (US\$M)

57

-84%

YTD Deal Count

2

-75%

[illegible]

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YoY %

YTD Deal Value (US\$M)

28

-58%

YTD Deal Count

1

-67%

[illegible]

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