

bubble

paxport

ilisys

sage

Lending  
stream

Payments.  
Designed by our customers  
Powered by

HyperJar

Revolut

Modulr

ris

W  
WAGESTREAM

ACCEN  
Enterprise

iwoca

May 2022

SALARY  
FINANCE

Today digital businesses are under even more pressure

### Lack of innovation

Underinvestment & low digital capability in banking services limits innovation



### customer demand

for instant access to services & funds



### Lack of competition

Complex infrastructure & regulation creates barriers to entry

### New business models



require accurate & real-time data & decisions

### Lack of investment

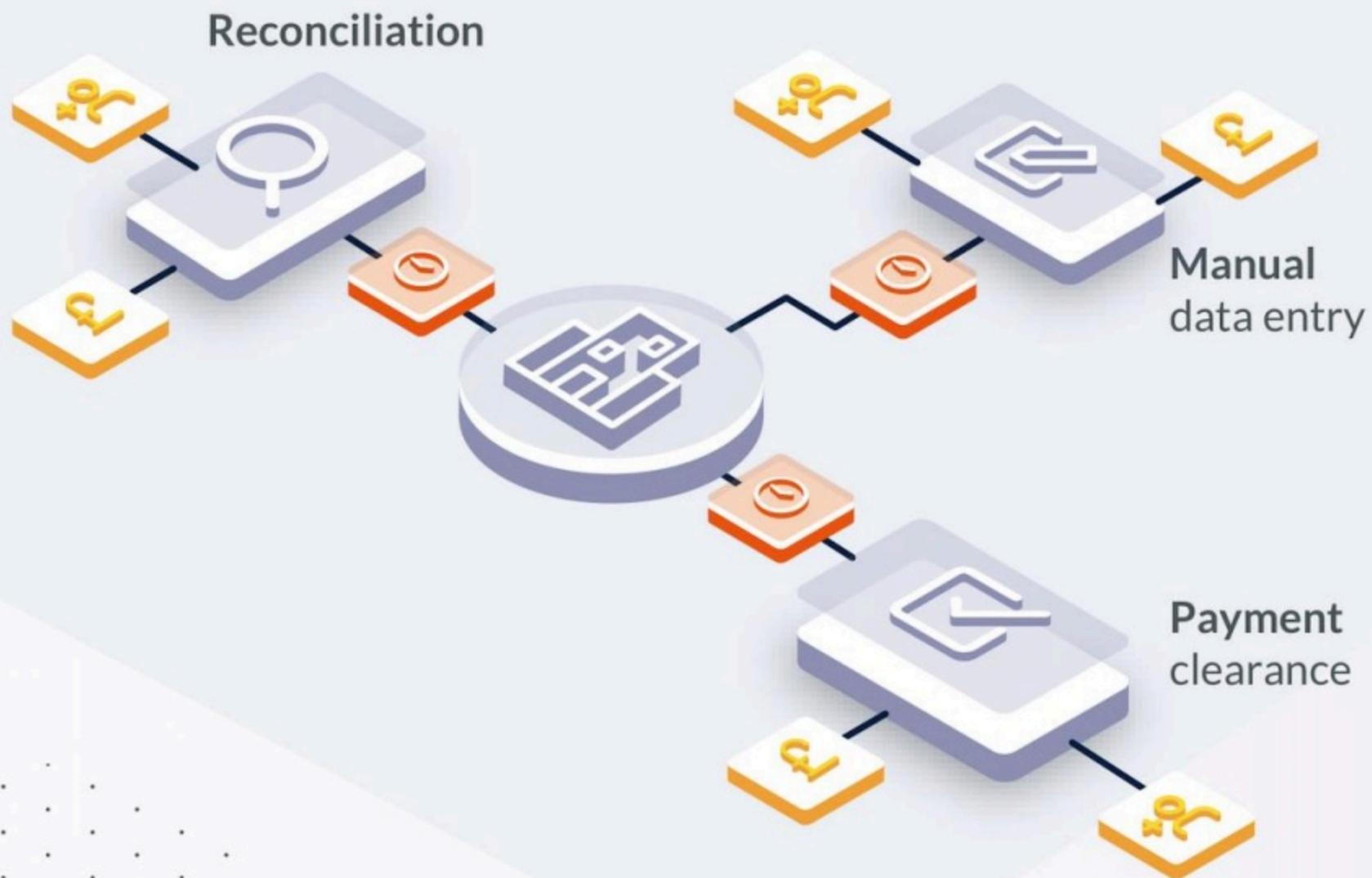
Banks control the market & underinvest in business payments

### Regulatory change



increases choice & complexity

# Spotting the hidden inefficiencies in your payment systems



Administrative  
burden



Unnecessary  
operational costs



No room for innovation

# Forward thinkers

can seize a competitive advantage

Freedom to focus on customer experience



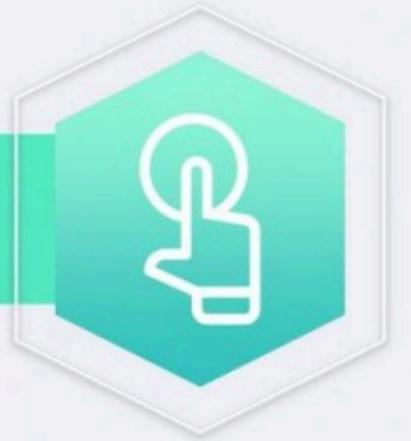
Remove hidden inefficiencies



Reduce operational costs



Competitive advantage



Quick and easy modernisation of payments infrastructure

# Here are the capabilities you need

## Legacy bank payment systems



## Embedded digital payments

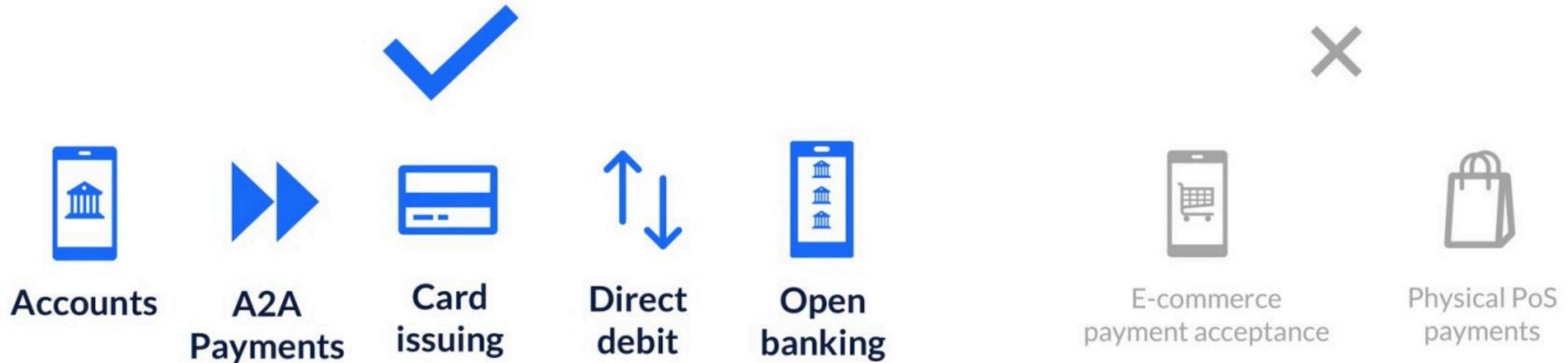


Quick

Easy

Better functionality

# Creating the modern FinOps hub



- We are creating the modern FinOps hub to enable enterprises and FinTechs to build, scale, operate and control business money flows
- Our customers want to offer and monetise payments, rather than leaving it to their bank, without being regulated
- We succeed because the platform provides accounts, multiple payment types, open banking services, cards, that can be initiated via API call, and is proven at scale
- Our revenue is driven by recurring transaction revenue with high net retention rates

We don't compete with PayPal, Worldpay, Adyen, Square, Klarna...

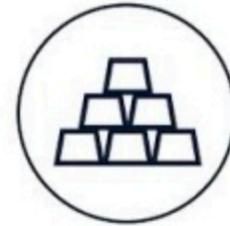
# Customers don't come to us asking for better payment solutions

They ask how we can solve their business issues.

## Example Outcomes



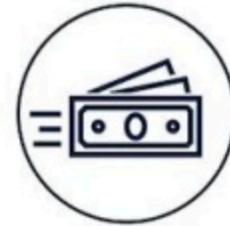
Lower call centre volumes



Monetise payments



Salaries no longer paid into wrong accounts



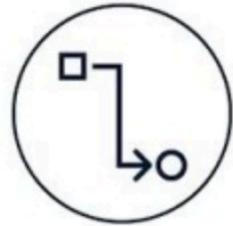
Higher likelihood of payment



Stickier customers



Real-time information for A2A transactions



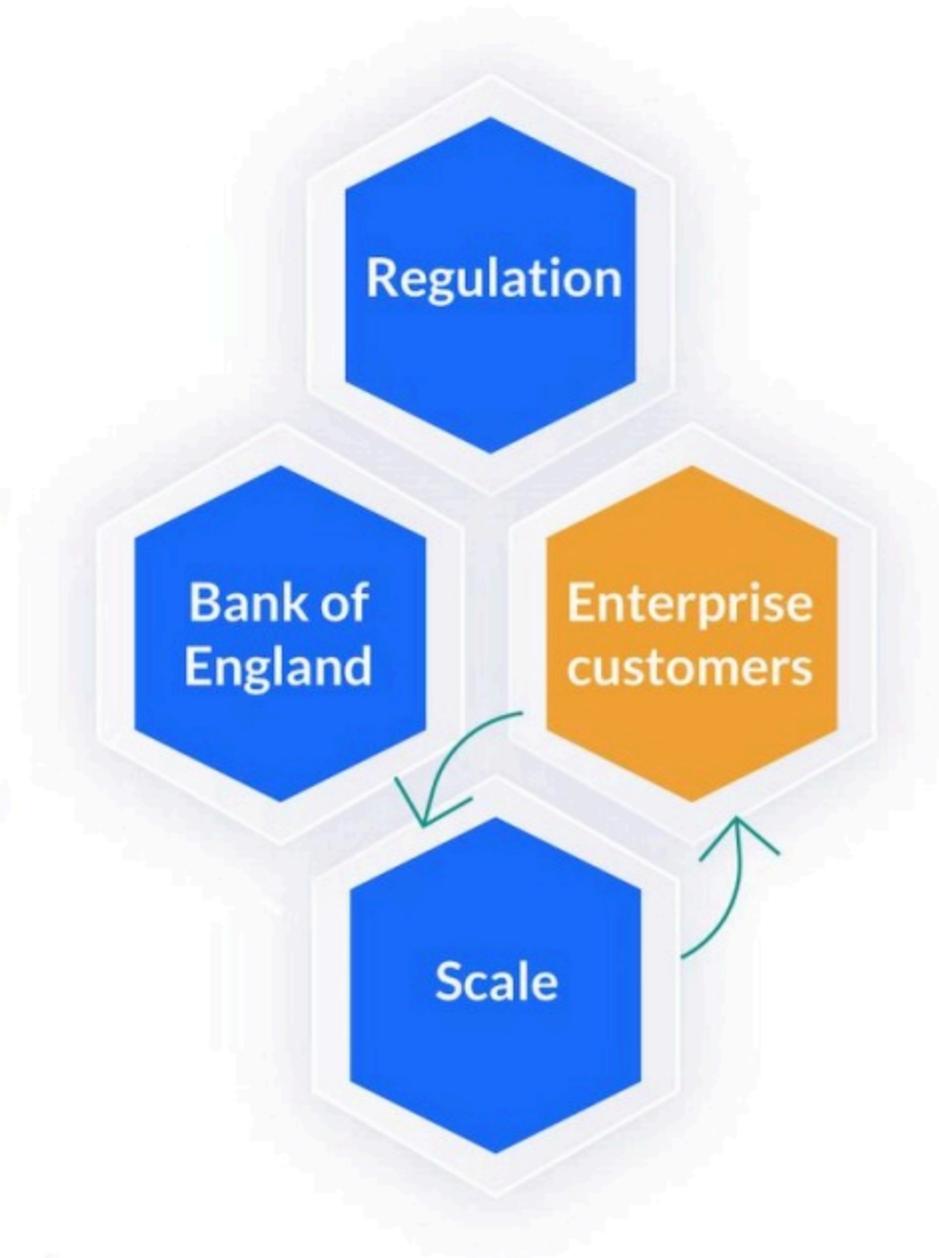
Eliminate errors by removing manual processes



Faster Payments go-live 8 weeks vs. 1 year

# The high-volume prize is the enterprise customer market

Our regulatory approach enables us to win enterprise customers who expect and demand regulatory excellence.



Without regulatory excellence...

...we would be unable to connect to the Bank of England, or attract large enterprise customers...

...who drive payments volume at scale, which in turn further attracts enterprise customers...



Chair PEFF (payments, e-money, fintech, and other financial services) working group



Member of FFE, monthly events, survey contributions and input



Fraud Working Group members Weekly calls



Member of trade body for electronic money issuers and innovative payment service providers

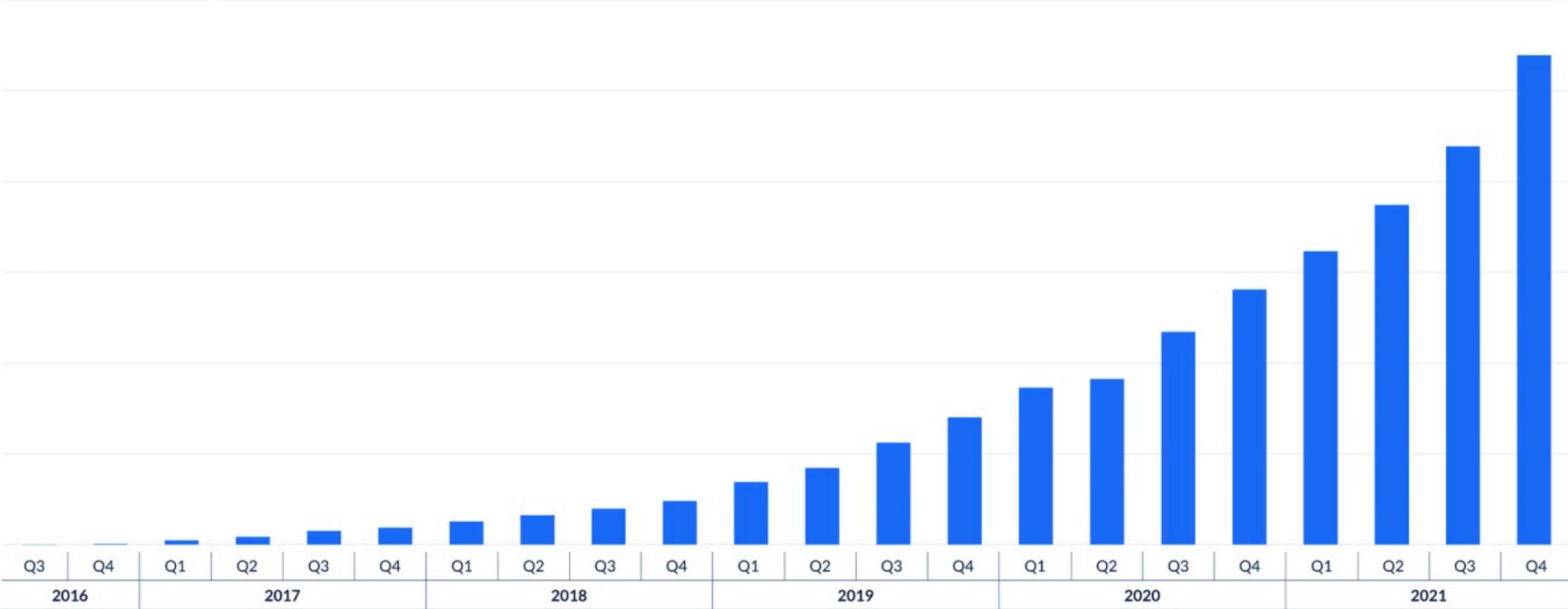


Member of 'Project Regulator' Working Group

# Growing fast

+105% year-on-year growth in annualised transaction revenue

Annualised Transaction Volume (m), at final month of quarter



# Giant opportunity

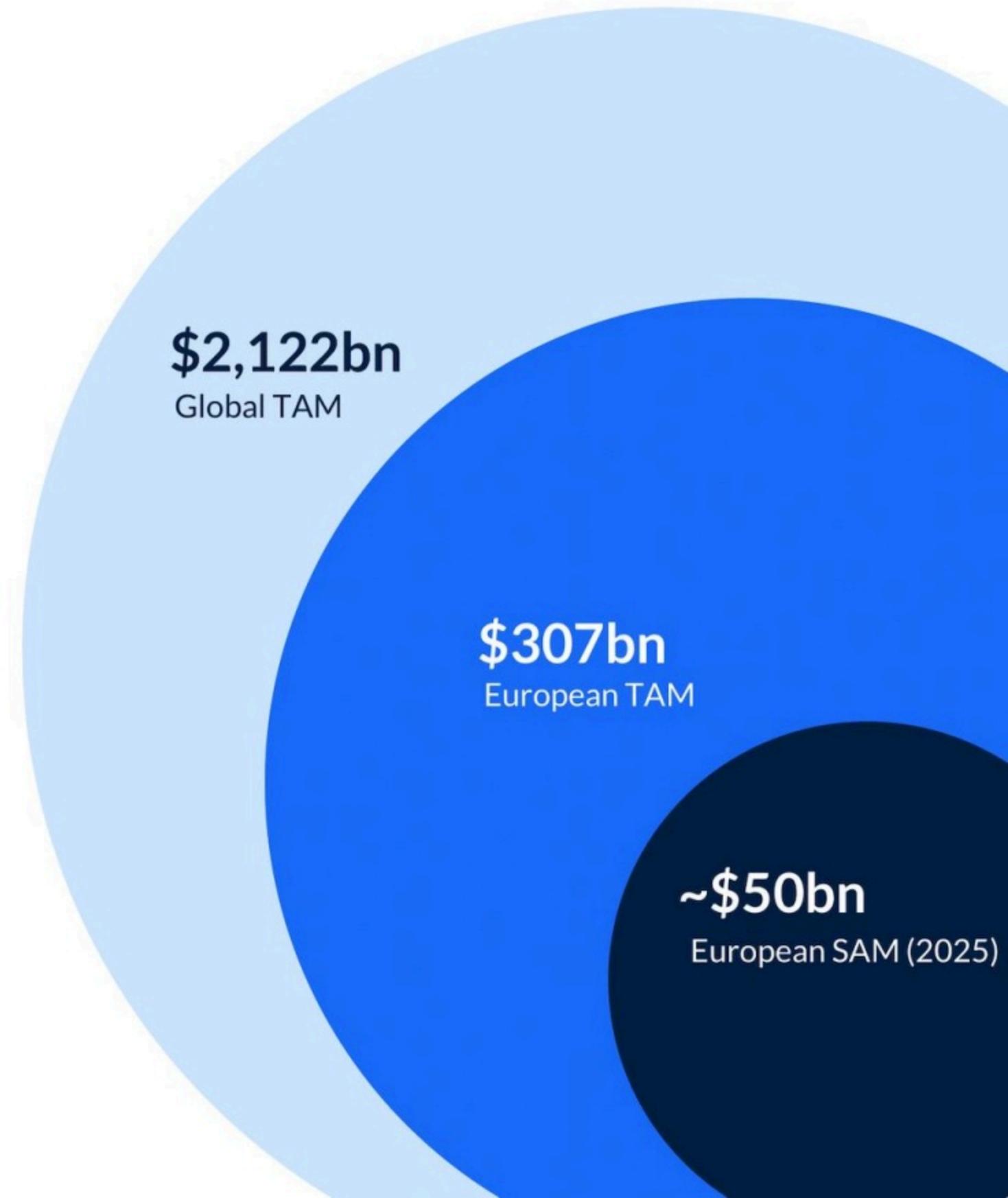
\$2trn+ global opportunity

Global revenue opportunity from payments estimated at over \$2trn.

Modulr will have the capability to target at least \$50bn of this opportunity in 2025 just from existing verticals.

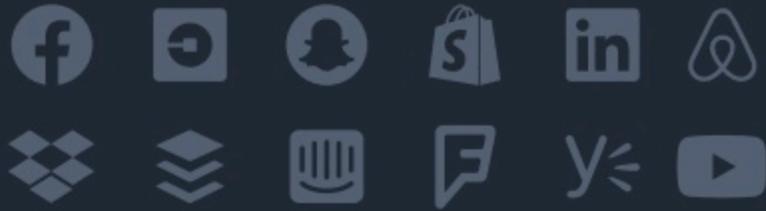
Strong market tailwinds to support Modulr capturing opportunity.

Accelerated by Modulr's investment in Go To Market and Product.



Source: BCG Global Payments 2021

Note: European SAM consists of payments revenue in current Modulr target verticals in UK and Europe



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