In this tutorial, we will search for investors based on the type of deals they're involved in, and the types of industries they invest in. We'll look at the details of each investment and walk through the process of exporting the data into Excel.
From the dashboard, open the sidebar and hover over the Advanced Search option. Then click Investors & Buyers.
The Key Fields tab of the Search Criteria page contains criteria that focus on the investor, their funds, and the companies they invest in. For now, we'll be using the tabs on the side to visit each section so that we can see more options.
First, let's define our search. We'll be selecting criteria to identify Private Equity firms and Corporations from the United States, that have acquired a European retail company. Click Investor Types.
This tab contains a list of various types of investors. Click **Private Equity**
Every investor in the platform is given a primary investor type, but they can be tagged to multiple types if it suits their investment behavior. This field narrows our search for only the primary type. Click **Search for primary investor type only**.
Next, we want to determine where the investors are located. Click Investor Location.
From this menu, we can select geographic regions where the investor must have an office location. Click **United States**.
Click Canada
By default, the search is looking for both main offices and alternative offices. This field changes the search so that it only pulls investors where their primary office is headquartered in the select locations. Click **Search HQ Only**
How to Search for Investors by Investment Activity

PitchBook Data

Click Deal Types
How to Search for Investors by Investment Activity

PitchBook Data

This section lists all the different types of deals that PitchBook has categorized. Since we're looking at acquisitions, we'll want to select deals types related to Buyouts and M&A. Click All Buyout Types
How to Search for Investors by Investment Activity

PitchBook Data

Click M&A/Control Transactions

Search by:
- Investor Types:
  - Private Equity
  - Strategic Acquirers
  - Search for Primary Investor Type Only
- Investor Locations:
  - United States
  - Canada
  - Search HQ Only
- Corp/Strategic M&A
  - M&A/Control Transactions

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Click M&A/Control Transactions
How to Search for Investors by Investment Activity

PitchBook Data

Click Deal Criteria
The Deal Criteria section contains fields that focus on other aspects surrounding the deal like date range, deal size, company valuation, etc. The Deal Status field determines the stage of the deals we're searching for. Click Completed.
The Deal Date field allows us to set parameters on when the select deals should have occurred. Type 2015 in **Deal Date: From**
How to Search for Investors by Investment Activity
PitchBook Data

Click **Deal Location**

![Investors & Buyers Search](image-url)
The Deal Location section is set up exactly like the Investor Location section. However, it is used to select the geographic location of the company being acquired instead of the investor. Click Europe.
Click **Search HQ Only**
Click **Deal Industry**
The Deal Industry section allows us to determine the industries of the acquired target companies. Click to expand the Consumer Products and Services (B2C) industry sector.
Within each industry sector are more options called industry groups. Click to select Retail.
Let's review the criteria prior to running the search. The search results will pull in Private Equity firms and Strategic Acquirers from the US and Canada, that have completed a Buyout or M&A transaction since 2015 for European Retail companies.
How to Search for Investors by Investment Activity

PitchBook Data

Click Search

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By default, we will land on the Investors tab. Our search has pulled in 134 investors that match the search criteria we selected.
The Columns will display information on each investor, such as: Name, Investor Type, Location, # of Investments, AUM, and Dry Powder.

![PitchBook Data](image-url)

<table>
<thead>
<tr>
<th>Investor Name</th>
<th>Primary Investor Type</th>
<th>HQ Location</th>
<th>Investments</th>
<th>Active Portfolio</th>
<th>AUM</th>
<th>Dry Powder</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kohlberg Kravis Roberts (KKR)</td>
<td>PE/Buyout</td>
<td>New York, NY</td>
<td>5</td>
<td>1</td>
<td>153,000,000</td>
<td>35,555,55</td>
<td>Established in 1976, Kohlberg Kravis Roberts (KKR) is a...</td>
</tr>
<tr>
<td>The Carlyle Group (CG)</td>
<td>PE/Buyout</td>
<td>Washington, DC</td>
<td>4</td>
<td>4</td>
<td>195,000,000</td>
<td>32,500,02</td>
<td>The Carlyle Group is a private equity firm and business...</td>
</tr>
<tr>
<td>Summit Partners</td>
<td>Growth/Expansion</td>
<td>Boston, MA</td>
<td>4</td>
<td>4</td>
<td>20,000,000</td>
<td>4,546,41</td>
<td>Summit Partners is a private equity and venture capital...</td>
</tr>
<tr>
<td>Lone Star Funds</td>
<td>PE/Buyout</td>
<td>Dallas, TX</td>
<td>4</td>
<td>4</td>
<td>70,000,000</td>
<td>15,936,71</td>
<td>Lone Star Funds is a private equity firm that invests...</td>
</tr>
<tr>
<td>H.K. Capital</td>
<td>PE/Secondary</td>
<td>Miami, FL</td>
<td>3</td>
<td>2</td>
<td>24,000,000</td>
<td>5,680,04</td>
<td>H.K. Capital is a global private equity firm that special...</td>
</tr>
<tr>
<td>TowerBrook Capital Partners</td>
<td>PE/Buyout</td>
<td>New York, NY</td>
<td>3</td>
<td>1</td>
<td>7,277,000</td>
<td>9,110,45</td>
<td>TowerBrook Capital Partners is an investment management...</td>
</tr>
</tbody>
</table>

**Preferred Industry**: Agriculture, Chemicals and Gases, Capital Markets/Institutions, Corporate Services, Communications, Aerospace and Defense, Media, Retail, Services (Non-financial), Technology, Investments, other (non-related).

**Note**: The image displays a screenshot of the PitchBook platform highlighting investor details. The table columns include Investor Name, Primary Investor Type, HQ Location, Investments, Active Portfolio, AUM, Dry Powder, and Description.
It is currently sorted to show the investors that have made the most number of investments related to the criteria. Kohlberg Kravis Roberts (KKR) leads the list, and has made 5 Buyout or M&A deals for European Retail companies since 2015.
At any point, you can click on Add Columns button to bring in more data points to your search results page. For now, let's take a deeper look at the transaction details. Click Deals.
The Deals tab will display information surrounding the transaction such as: the acquired Company Name, Deal Date, Deal Type, Deal Size, Post Valuation, and Investor.
You can also download data from the platform into an Excel file. Click **Download to Excel**.
The sidebar will list several templates to choose from. Each template contains a different set of data points that you can export. Click Deal Investors.
Upon selecting a template, you'll be able to see the data point columns that will be exported. The Deal Investors template contains information on the acquired company, their deal details, and lists all the investors involved in each transaction.
Now that we've completed a search looking for PE firms and Corporate Acquirers, let's try a different search. This time, let's look for west coast Venture Capital firms that have made investments into Software companies.
Click **Investor Types**

**How to Search for Investors by Investment Activity**

**PitchBook Data**

In the Investors & Buyers Search section, select **Investor Types** from the Key Fields menu.
Click **Angels/Incubators**

![PitchBook Data](image)

### Investors & Buyers Search

**Search by:** Search criteria below...

<table>
<thead>
<tr>
<th>Key Fields</th>
<th>Investor Types</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Investor Location</td>
</tr>
<tr>
<td></td>
<td>General Information</td>
</tr>
<tr>
<td></td>
<td>Stated Preferences</td>
</tr>
<tr>
<td></td>
<td>Fund Criteria</td>
</tr>
<tr>
<td></td>
<td>Fundraising &amp; IRR</td>
</tr>
<tr>
<td></td>
<td>Deal Criteria</td>
</tr>
<tr>
<td></td>
<td>Deal Types</td>
</tr>
<tr>
<td></td>
<td>Deal Exit Types</td>
</tr>
<tr>
<td></td>
<td>Deal Location</td>
</tr>
<tr>
<td></td>
<td>Deal Industry</td>
</tr>
<tr>
<td></td>
<td>Service Providers</td>
</tr>
<tr>
<td></td>
<td>Lists</td>
</tr>
<tr>
<td></td>
<td>IS Request a Field</td>
</tr>
</tbody>
</table>

- **Investor Types**
  - Angel Group
  - Angel (individual)
  - Accelerator/Incubator
  - Venture Capital
  - Corporate Venture Capital
  - Private Equity
  - PE/Investor
  - Growth/Expansion
  - Mezzanine
  - Strategic Acquirers
  - Corporate
  - Corporate Development
  - PE-Backed Company
  - VC-Backed Company
  - Other Investor Types
  - Business Development Company
  - Family Office
  - Fund of Funds
  - Government
  - Hedge Fund
  - Infrastructure
  - Investment Bank
  - Lender/Debt Provider
  - Limited Partner
  - Merchant Banking Firm
  - Real Estate
  - SBC
  - Secondary Buyer
  - Sovereign Wealth Fund
  - University

- **Additional Options**
  - Search for primary investor type only
  - Search lead investors only
  - Include PE-backed companies that made Additions

---

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Click **Venture Capital**
Click **Search for primary investor type only**
Click Investor Location
How to Search for Investors by Investment Activity

PitchBook Data

Click to expand United States
Click West Coast
Click **Search HQ Only**
Click **Deal Types**
Click **All VC Stages**
Click Deal Criteria
How to Search for Investors by Investment Activity

PitchBook Data

Click **Completed**

<table>
<thead>
<tr>
<th>Investors &amp; Buyers Search</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Investor Types:</strong></td>
</tr>
<tr>
<td>Angel/Incubators</td>
</tr>
<tr>
<td><strong>Deal Type:</strong></td>
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<tr>
<td>All VC Stages</td>
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<table>
<thead>
<tr>
<th>Deal Fields (3)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investor Location (1)</td>
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<tr>
<td>General Information</td>
</tr>
<tr>
<td>Stated Preferences</td>
</tr>
<tr>
<td>Fund Criteria</td>
</tr>
<tr>
<td>Fundraising &amp; IRR</td>
</tr>
<tr>
<td><strong>Deal Criteria</strong></td>
</tr>
<tr>
<td>Deal Type (1)</td>
</tr>
<tr>
<td>Deal Exit Types</td>
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<tr>
<td>Deal Location</td>
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<tr>
<td>Deal Industry</td>
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<tr>
<td>Service Providers Lists</td>
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<td>ES Request a Lead</td>
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<th><strong>Deal Info</strong></th>
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<tbody>
<tr>
<td>Number of Investments</td>
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<tr>
<td>Min</td>
</tr>
<tr>
<td>% of Investments</td>
</tr>
<tr>
<td>Min</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Deal Date</strong></th>
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</thead>
<tbody>
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<tr>
<td>Trailing Range</td>
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<td>From</td>
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<table>
<thead>
<tr>
<th><strong>Deal Size</strong></th>
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<tbody>
<tr>
<td>Min</td>
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<table>
<thead>
<tr>
<th><strong>Deal Status</strong></th>
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<tbody>
<tr>
<td>Completed</td>
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</table>

<table>
<thead>
<tr>
<th>Company Info</th>
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<tbody>
<tr>
<td>CompanyUniverses</td>
</tr>
<tr>
<td>Pre-venture</td>
</tr>
<tr>
<td>M&amp;A</td>
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<tr>
<td>Other Private Companies</td>
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</table>

<table>
<thead>
<tr>
<th>Pre-money Val.</th>
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<tbody>
<tr>
<td>Min</td>
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<table>
<thead>
<tr>
<th>Post Valuation</th>
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<tr>
<td>Min</td>
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<table>
<thead>
<tr>
<th>Total Raised</th>
</tr>
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<tbody>
<tr>
<td>Min</td>
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</table>

<table>
<thead>
<tr>
<th>Company Names</th>
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<table>
<thead>
<tr>
<th>Additional Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include deals without a deal size</td>
</tr>
<tr>
<td>Exclude deals without a deal size</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Search Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only search for active portfolio companies</td>
</tr>
<tr>
<td>Only the most recently acquired company transaction</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>First/Follow-On</th>
</tr>
</thead>
<tbody>
<tr>
<td>First time investors</td>
</tr>
</tbody>
</table>

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Click **Deal Industry**
Click to expand the Information Technology industry sector
How to Search for Investors by Investment Activity

PitchBook Data

Click **Software**
How to Search for Investors by Investment Activity

Click **Search Primary Industry Only**
Click **Deal Location**
How to Search for Investors by Investment Activity

PitchBook Data

Click to expand United States
How to Search for Investors by Investment Activity
PitchBook Data

Click Bay Area
How to Search for Investors by Investment Activity
PitchBook Data

Click **Search HQ Only**

```
<table>
<thead>
<tr>
<th>Key Fields (8)</th>
<th>Investor Types (9)</th>
<th>Investor Location (1)</th>
</tr>
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<tbody>
<tr>
<td>Core Fields</td>
<td>Investor Types</td>
<td>General Information</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Stated Preferences</td>
</tr>
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<td></td>
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<td>Fund Criteria</td>
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<td></td>
<td></td>
<td>Fundraising &amp; IRR</td>
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<td></td>
<td>Deal Criteria</td>
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<td></td>
<td></td>
<td>Deal Types</td>
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<td></td>
<td></td>
<td>Deal Exit Types</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Deal Location</td>
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<tr>
<td></td>
<td></td>
<td>Deal Industry (2)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Service Providers</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Lists</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IS Request a Field</td>
</tr>
</tbody>
</table>

**General Regions**
- United States
  - Primary US Regions
    - Mid Atlantic
    - New England
    - Southwest
    - South
    - Midwest
    - Great Lakes
    - Mountain
    - West Coast
  - Secondary US Regions
    - Bay Area
    - DC Metro
    - New York Metro
    - Northeast
    - Northwest
    - Southern California
    - Southwest
    - US Territories
    - Canada
    - Europe
    - Americas
    - Asia
    - Africa
    - Middle East
    - Oceania

**Specific Locations**
- Countries
- Cities
- Post Codes

**Additional Options**
- Search HQ Only
- Any office location
```
Click Deal Criteria
The Number of Investments field sets a minimum or maximum number on the amount of investments. This is a good field to use when wanting to find investors that have been particularly active within a space. Click **Number of Investments: Min**
How to Search for Investors by Investment Activity

PitchBook Data

Type 3 in **Number of Investors: Min**
The % of Investments field is used to compare the number of investments that match the criteria against the total number of investments that the firm has ever made. Click % of Investments: Min.
How to Search for Investors by Investment Activity

PitchBook Data

Type 25% in % of Investments: Min

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How to Search for Investors by Investment Activity

PitchBook Data

Click Deal Date: From highlight

投资者及买家搜索

搜索条件：投资者类型、投资类型、公司行业、投资位置

搜索项：投资者类型：天使/孵化器、风险资本、搜索主要投资者类型、投资者位置：美国西海岸、搜索行业：信息科技、软件

搜索结果：最少投资：最小，百分比：最小

搜索项：交易日期：自定义区间

搜索结果：最少投资：最少，百分比：最小

搜索项：交易规模

搜索结果：最少投资：最少

搜索项：公司名称

搜索结果：最少
Type 2016 in Deal Date: From
How to Search for Investors by Investment Activity

PitchBook Data

Click Completed
Once again, let's review our search before running it. We will be identifying Angel and Venture Capital investors from the US-West Coast that have completed at least 3 VC stage deals since 2016 for Software companies in the US-Bay Area.
How to Search for Investors by Investment Activity

PitchBook Data

Click Search
The search results have pulled in 26 investors that have matched our stricter criteria. We can look through the columns to verify that these investors are the correct type and are from the correct location.
However, we can use the Add Columns feature to bring in more data points and get more insight. Click Add Columns.
How to Search for Investors by Investment Activity

PitchBook Data

Click **Total Investments**

![Image of PitchBook interface showing how to search for investors by investment activity](image)

- **Investors & Funds** 26 Investors
  - **Search criteria**:
    - Investor Types: Angel/Seed, Venture Capital
    - Investor Location: United States > West Coast
    - Number of Investments: Min 2
    - Deal Date: From 21 Jan 2016
  - **Find**:
    - Total Investments
      - Total Activity:
        - Total Investments in the last 7 days
        - Total Investments in the last 6 months
        - Total Investments in the last 12 months
        - Total Investments in the last 2 years
        - Total Investments in the last 5 years
      - Total Activity (last year):
        - Total Investments
        - Total Investments in the last 7 days
        - Total Investments in the last 6 months
        - Total Investments in the last 12 months
      - Total Activity (last 5 years):
        - Total Investments
        - Total Investments in the last 7 days
        - Total Investments in the last 6 months
        - Total Investments in the last 12 months

---

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How to Search for Investors by Investment Activity

PitchBook Data

Click Save

---

<table>
<thead>
<tr>
<th>Investors &amp; Funds</th>
<th>26 Investors</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Investors</td>
<td></td>
</tr>
<tr>
<td>Funds</td>
<td></td>
</tr>
<tr>
<td>Companies</td>
<td></td>
</tr>
<tr>
<td>Limited Partners</td>
<td></td>
</tr>
</tbody>
</table>

- **Search Criteria:**
  - Investor Types: Angel/Incubator, Venture Capital
  - Deal Type: All, VC Stage
  - Duration: June 2018

- **Investor Info:**
  - Investor Name
  - Year Founded
  - HQ Location

- **Investments:**
  - Investments
  - Exits
  - Active Portfolio

- **Fundraising:**
  - # Funds Open
  - # Funds Closed

- **Investment Preferences:**
  - Preferred Industry
  - Preferred Stages

---

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Let's rearrange the current column layout so that it is easier to compare data points. With your mouse, click and drag Investments, then drop it to the left of Total Investments.
How to Search for Investors by Investment Activity

PitchBook Data

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For each investor, we can now see the number of investments they made that match the criteria (Investments) next to the total number of investments that the firm has ever made. We can also see that each investor met the 25% minimum requirement.
March Capital Partners leads the list with the most investments made compared to the rest of the list. Let's learn more about those particular investments. Click 14.
We're now viewing the transaction details of 14 deals that March Capital Partners was involved in. This method is great for looking at a single investor's deal history instead of viewing the entire list of transactions like in our previous search.
Let's return to the previous list of 26 investors and try to download their information into excel. Click **Download to Excel**
Click **Investor General Information**

![Image of PitchBook screenshot showing how to search for investors by investment activity.](image-url)

Please select template or search for specific columns on the left.
The previous template that we took a look at before had tons of data points focused on hundreds of deals and the parties involved. This template contains a smaller list of data points, and focuses on giving us a general summary for each investor.
There's always the option to switch up the dataset you're looking at. Click Deals (Portfolio)
Instead of just investor information, this template focuses on listing the portfolio companies (that match the criteria) for each investor. It also contains information on the transaction that the investor made with that company.

**How to Search for Investors by Investment Activity**

**PitchBook Data**

Apr 27, 2018
Now you know how to search for investors based on their investment activity. We also covered how to navigate between the different search results tabs and how to export the data into an Excel file.