

Gain

EGERIA

Case Study

How Egeria Cut Research and Screening Time by 2/3rds



Egeria is a private equity firm focused on partnering with entrepreneurial, healthy businesses across North America, Benelux, and DACH regions. With a focus on companies valued up to €500 million, Egeria targets businesses with strong growth potential and supports them through long-term investment horizons of five to seven years. The firm works closely with management teams to drive value through add-on acquisitions, international expansion and digital transformation, while maintaining a strong belief in the people behind its portfolio companies. Gain supports Egeria's private equity teams across the US and Europe.

The Challenge:

Lack of Transparency in Private Market Data

Egeria's private equity team found that market and company research was slowed by information being spread across multiple tools and sources. This was especially challenging for private companies, where data is harder to access and often tedious to piece together.

"We needed to streamline market and company research in a landscape where data is fragmented, and for private companies, often difficult and time consuming to obtain."

Todd Ofenloch
Managing Partner - North American Private Equity

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The Solution:

A More Efficient and Reliable Platform

The team set out to find a solution that could bring together high quality data on private companies, sponsors, and deals all in one place, and Gain was the clear winner for them.

"We chose Gain because it combines high quality private company, sponsor, and deal data in one platform, with far better coverage than other platforms. It's a much better solution than our manual process which involved keeping data in various files and spreadsheets. It also was priced such that we thought it was good value."

Todd Ofenloch

Use Cases:

Powering Smarter Deal Sourcing and Evaluation

- ✓ Build target lists and map sectors to better understand companies and the competitive landscape
- ✓ Identify and prioritize actionable off-market opportunities across industries
- ✓ Quickly assess inbound deals and add-ons using financials, ownership data, comps, and market context
- ✓ Monitor competitors, consolidators, and potential buyers while tracking deals and ownership changes

"We use Gain to search industries and find potentially actionable opportunities. Using the company profiles, we can quickly decide whether to advance or drop new opportunities."

Todd Ofenloch

The Results:

Time Savings and Greater Strategic Focus

Since adopting Gain, the team at Egeria has significantly reduced the time spent on research and screening activities. Tasks such as building sector maps and long lists are now completed much faster, enabling the team to operate more efficiently while expanding their pipeline and accelerating decision making.

"Gain cuts the time to build sector maps and long lists by about two-thirds and saves roughly half a day per week per investment professional on research and screening, while improving pipeline breadth and decision speed."

Todd Ofenloch

With less time spent on manual research, the team can focus more on higher value activities across the investment lifecycle, from origination through to portfolio management.

"The time saved lets us spend more on thesis work, better targeted origination, deeper pre-IC analysis, and closer portfolio support around M&A and exits."

Todd Ofenloch

Ongoing success with Gain

Overall, Gain has enabled Egeria's private equity team to move faster, work more efficiently, and focus on what drives the most value. By centralizing reliable private market intelligence and reducing manual effort, the team is better equipped to source opportunities, make informed decisions, and support portfolio companies throughout the investment lifecycle.



Scan to try Gain for yourself

"The only reason not to recommend Gain is to keep it for myself."

