

# Workshop Topic: Internet & Digital Media

Presented by: Steve Harmston

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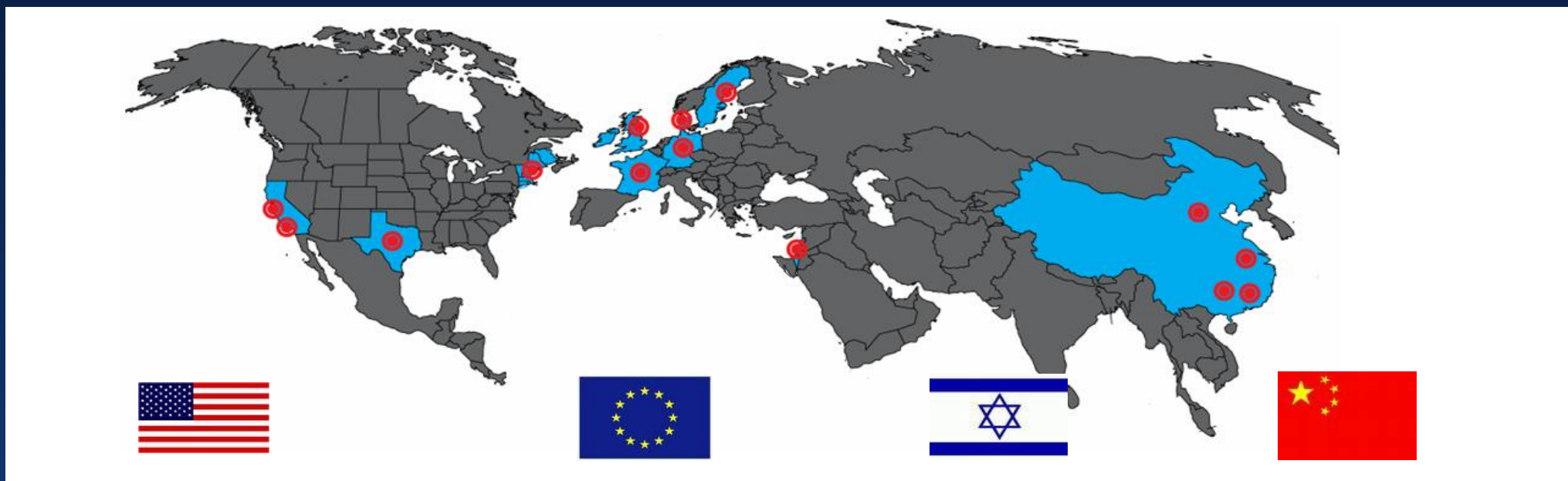
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# Hotbed Investments 1H'2006



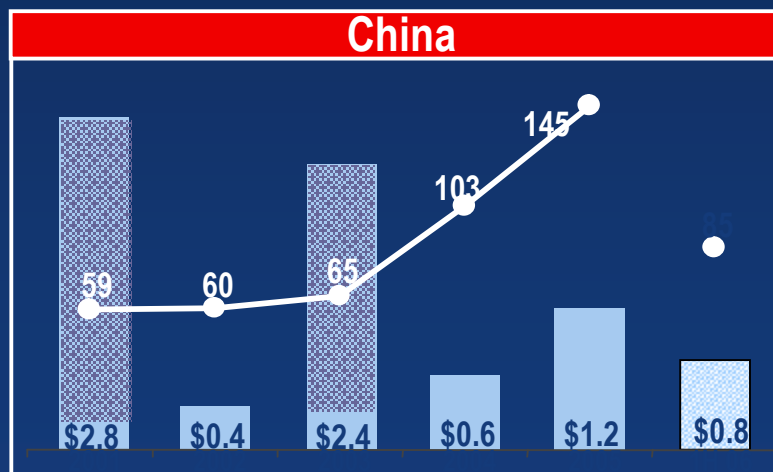
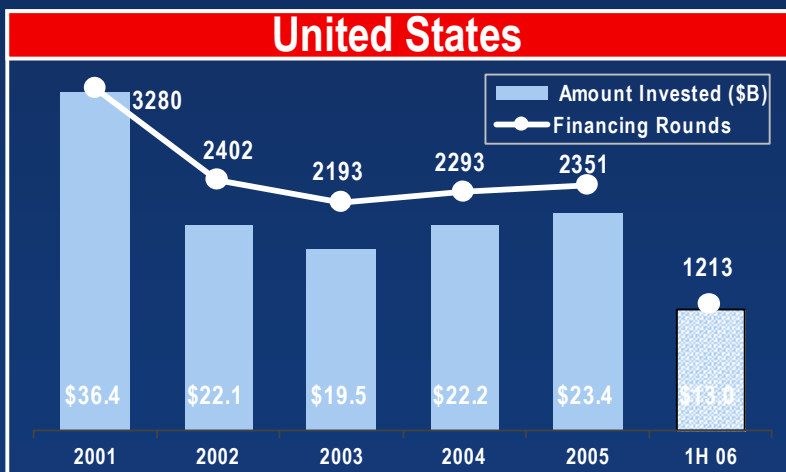
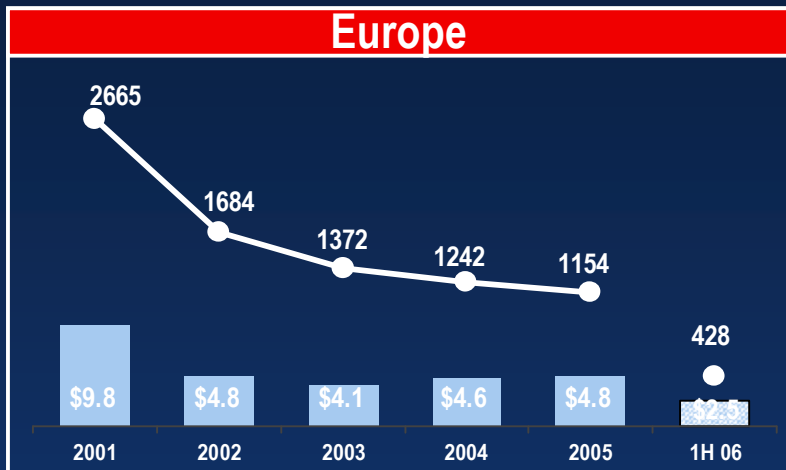
<ul style="list-style-type: none"> <li>• <b>Bay Area</b> 392 deals \$4.3 billion raised</li> <li>• <b>New England</b> 148 deals \$1.8 billion raised</li> <li>• <b>Southern California</b> 121 deals \$1.5 billion raised</li> </ul>	<ul style="list-style-type: none"> <li>• <b>New York Metro</b> 107 deals \$1.2 billion raised</li> <li>• <b>Texas</b> 67 deals \$593 million raised</li> </ul>	<ul style="list-style-type: none"> <li>• <b>United Kingdom</b> 125 deals \$822.7 million raised</li> <li>• <b>France</b> 83 deals \$461.1 million raised</li> <li>• <b>Germany</b> 54 deals \$311.8 million raised</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Sweden</b> 46 deals \$155.4 million raised</li> <li>• <b>Denmark</b> 18 deals \$167.8 million raised</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Israel</b> 112 deals \$701 million raised</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Beijing</b> 37 deals \$398.9 million raised</li> <li>• <b>Shanghai</b> 29 deals \$179.9 million raised</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Shenzhen</b> 7 deals \$71.9 million raised</li> <li>• <b>Guangzhou</b> 3 deal \$11.3 million raised</li> </ul>
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Note: Map not to scale

Source: Dow Jones VentureOne/ Ernst & Young



# Annual VC: China Showing Sharp Growth

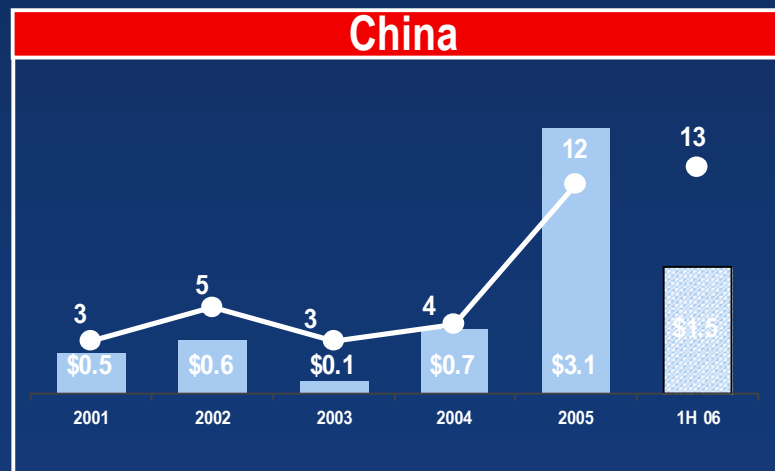
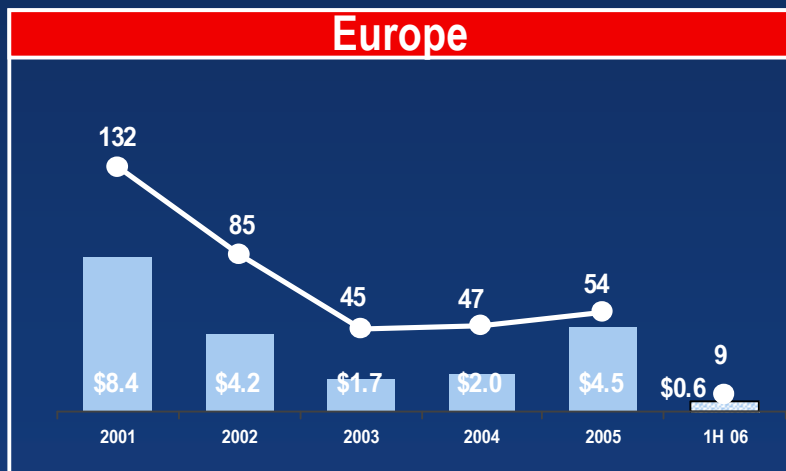
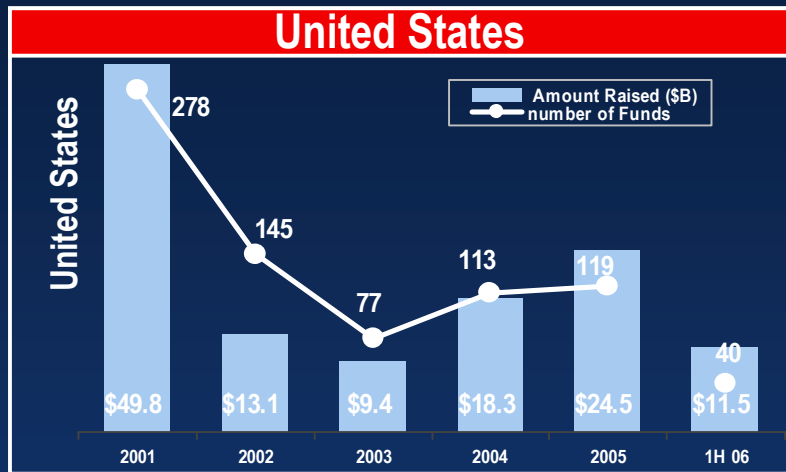


Note: China investment figures for 2001 and 2003 are skewed by large investments 2 companies – Hejian Technology (11/1/01, \$1.6 billion) and Semiconductor Manufacturing International (9/1/01, \$1.0 billion; 9/1/03, \$636 million; 9/23/03, \$1.5 billion)

Source: Dow Jones VentureOne/ Ernst & Young



# Chinese Venture Fundraising in 1H'06



Note: Chart scales vary for clarity.

Source: Dow Jones VentureOne/ Ernst & Young