Banking & lending technology landscape

60 providers and product groups across six bank and lender technology segments

60
PROVIDER GROUPS

Core banking & processing

11

$81M raised · 9 M&A deals · -6% headcount

- **FIS** — Public
- **Fiserv** — Public
- **Jack Henry** — Public
- **Temenos** — Public
- **Corelation**
- **CSI** — Includes Apiture
- **Thought Machine**
- **Mambu**
- **Nymbus**
- **Pismo** — Part of Visa
- **CORA Group** — Part of Constellation Software

Digital banking & account opening

11

$305M raised · 8 M&A deals · +3% headcount

- **Q2** — Public
- **Alkami** — Public; includes MANTL
- **Candescent** — Veritas Capital
- **Apiture** — Part of CSI
- **Narmi**
- **Autobooks**
- **Lumin**
- **Bankjoy**
- **Backbase**
- **Tyfone** — Includes ATTUNE
- **Array**

Commercial & consumer lending

11

Undisclosed raised · 9 M&A deals · -14% headcount

- **Finastra** — Vista Equity
- **nCino** — Public
- **MeridianLink** — Centerbridge
- **Open Lending** — Part of ANV
- **Teslar**
- **Abrigo**
- **Baker Hill** — Flexpoint Ford
- **AFS** — OceanSound
- **LoanPro**
- **Zest AI**
- **Built**

Mortgage technology

8

$0 raised · 2 M&A deals · -12% headcount

- **ICE** — Mortgage Technology
- **Blend** — Public
- **Optimal Blue** — Part of Constellation Software
- **Mortgage Cadence** — Part of PartnerOne
- **Cotality** — Formerly CoreLogic
- **Sagent**
- **Polly**
- **Ocrolus**

Risk, compliance & fraud

10

$145M raised · 3 M&A deals · +10% headcount

- **NICE Actimize** — Part of NICE
- **Ncontracts** — Hg-backed
- **Alloy**
- **Hummingbird**
- **Unit21**
- **Socure** — Includes Effectiv
- **Featurespace** — Part of Visa
- **Feedzai**
- **DefenseStorm**
- **Sardine**

Bank data, connectivity & BaaS

9

$590M raised · 6 M&A deals · +22% headcount

- **Galileo** — Part of SoFi
- **Plaid**
- **MX**
- **Akoya**
- **Unit**
- **Synctera**
- **Treasury Prime**
- **Kinective**
- **Lithic**

HOW TO READ Grouped by primary offering. Categories overlap; acquired brands are shown under their current owner where they no longer trade separately.

LEGEND Capital raised, last 24 months: lower to higher · Most M&A activity · Raised capital or changed hands, last 12 months

U.S. bank and credit union market focus. Sublabels show owner or status where verified. Research as of November 12, 2026.

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