



Dear Business Partners

We are pleased to update you on AURELIUS' most recent news and developments, the highlights of which include new investments, strong financial results and continued momentum in our UK business.

News and developments at AURELIUS Group

- AURELIUS reported strong growth in Q3 with consolidated EBITDA at a record total of EUR 208.5 million. » [Read Announcement](#)
- Four successful exits delivered a large cash contribution taking cash and equivalents to EUR 368.2 million
- AURELIUS' net asset value of Group companies increased to €1.1bn
- The AURELIUS Executive Board raised its forecast for EBITDA over 2014 as a whole to at least EUR 240 million
- Acquisition of a majority interest in B+P Gerüstbau GmbH from its Managing Director and owner Alexander Steinberg by the recently formed AURELIUS subsidiary AURELIUS Mittelstandskapital. » [Read Announcement](#)
- AURELIUS opened a new Madrid office (following the recent international expansion to London and the Nordics) to manage the Group's activities across Spain and Portugal. » [Read Announcement](#)
- Shortlisted for two awards at The Private Equity Awards 2015 - Turnaround House of the Year and Germany, Austria, Switzerland Deal of the Year - Small & Mid-cap

News and developments in the UK

- Acquisition of ECO Plastics, a recycling business, that operates one of the world's largest and most sophisticated plastic reprocessing plants, capable of sorting 150,000 tonnes of mixed bottles per year (representing around 35% of the total UK

- bottle collection in the UK every year)
- Our UK team continues to grow with the recruitment of William Stamp earlier this month who joins as Principal from Hilco Capital
 - Our internship programme is into its second year and following an extensive selection process, we have hired new interns for 2015
 - Given the momentum in our business, we are looking to recruit a new manager into our operational team
 - Direct origination focus in London, with visits to key regional markets of Birmingham, Reading, Bristol, Manchester, Leeds, Dublin and Edinburgh
 - Continued updates on our activities via [our website](#) and through social media ([Twitter](#) and [LinkedIn](#))

About AURELIUS

AURELIUS is a listed mid-market pan-European investor with combined revenues of c. EUR 1.5bn and over 10,000 employees. AURELIUS has offices in Munich, London, Madrid and Stockholm, as well as portfolio companies operating across Germany, France, UK, Poland, Hungary, Belgium, Luxembourg, Spain and Switzerland.

What we are looking for

As an active investor with a long-term investment horizon, we are searching for European corporate spin-offs and medium-sized enterprises with the following characteristics:

- Growth potential given close operational assistance
- Below-average profitability and/or need of restructuring; or
- Synergies to existing platform investments

We are looking for target companies with revenues between €30m and €750m and EBITDA margin up to 10% (in exceptional cases also negative). Deal values of up to €150m, equity investments ranging from €1m to €50m, and all-equity deals as well as flexible contract structures with respect to seller requirements are also possible. We place strong emphasis on the following industries: Industrials, Chemicals, Business services, Consumer goods, Food & beverages and TMT

AURELIUS in the UK

AURELIUS Investments is the UK office of AURELIUS, and has been operational for more than five years. We are an eight person team focused on sourcing, executing and managing investments across the UK & Ireland. Located in Savile Row, London we have completed half a dozen transactions to date and current UK investments are in the chemicals, IT services and manufacturing sectors

If you have an interesting opportunity you'd like to discuss, we would be glad to hear from

you.

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