

LUNAR VENTURES

Building Europe's leading science and technology fund



MICK HALSBAND

Software engineer → Deep tech investor

2 decades building software:
embedded, mobile, ML, computer vision, finance.

Early stage Investor

Tel Aviv -> Berlin



DR. ELAD VERBIN

2 decades leading research



OR LUIS SHEMTOV, MBA

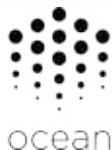
10 years BizDev & Startup Management



ALBERTO CRESTO

5 years VC in Industrial IoT

LUNAR VENTURES INVESTMENTS





BERLIN, 2000s



















































































BERLIN, PRESENT DAY



\$1B+		N26					     
\$500-1B		 					
\$250-500M		  		  			 
\$100-250M		      		   	   	   	
\$0-100M	    	     	  	     	    	   	      
	Artificial Intelligence View all 200+ companies	Fintech View all 300+ companies	IoT & Robotics View all 100+ companies	Enterprise SaaS View all 600+ companies	Mobility View all 150+ companies	Blockchain View all 100+ companies	Marketplaces View all 350+ companies

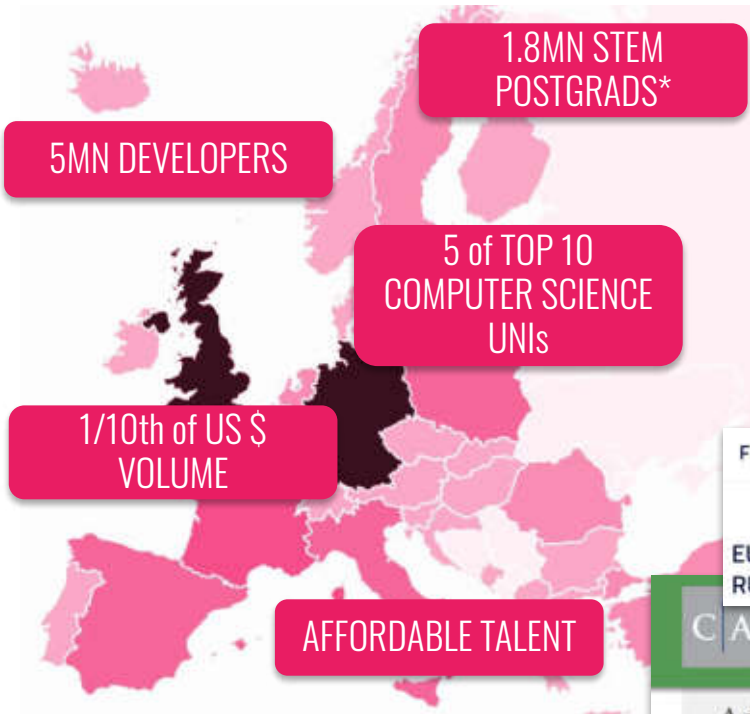
Germany leads in tech talent, with Berlin leading in AI skills



■ Number of professional developers per country (K) in 2017

Source: [State of European Tech 2017](#)

The time for European deep tech



Deep Tech startups: Next wave of global disruptors?



FINANCIAL TIMES
Europe has a chance to dominate deep tech

The Era of Frontier Technology
Dec 29, 2018
What is Frontier Technology?
Some call it frontier technology or "frontier" terms such as disruptive, emerging or bleeding edge.

Tackling Europe's Gap in Digital Skills

TOP TIER
Why Europe Now?
Mar 14, 2019
ABOUT US
has been evaluating the venture capital market. As we analyze the market across metrics in particular - innovation, these three metrics often leads to

...being compounded by an emerging market. Without faster and more comprehensive data, it is difficult to see the full picture. 4 reasons Europe will be a major force in "deep tech" innovation

FOR A STRONG DIGITAL EUROPE

EUROPE IS DEEP TECH: 200 EUROPEAN SCALEUPS IN THE RUNNING FOR THE EIT DIGITAL CHALLENGE 2018



Advice in Brief

We do not expect venture capital to repeat its lost decade of the 2000s. Within venture capital, we are focused on smaller funds, earlier stage, markets outside of California, and healthcare.

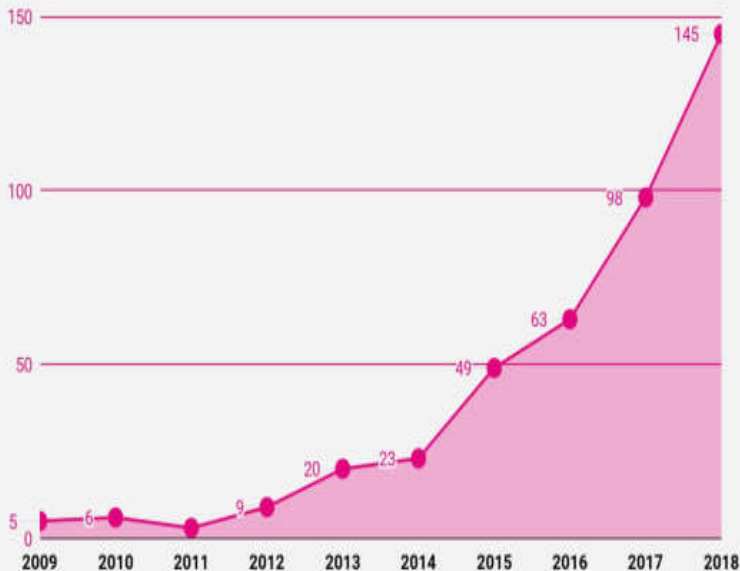
Financing the Deep Tech Revolution:
How investors assess risks in Key Enabling Technologies (KETs)
Funding remains a challenge

Still, funding remains a challenge since startups. One reason is that many companies

* science, technology, engineering and mathematics

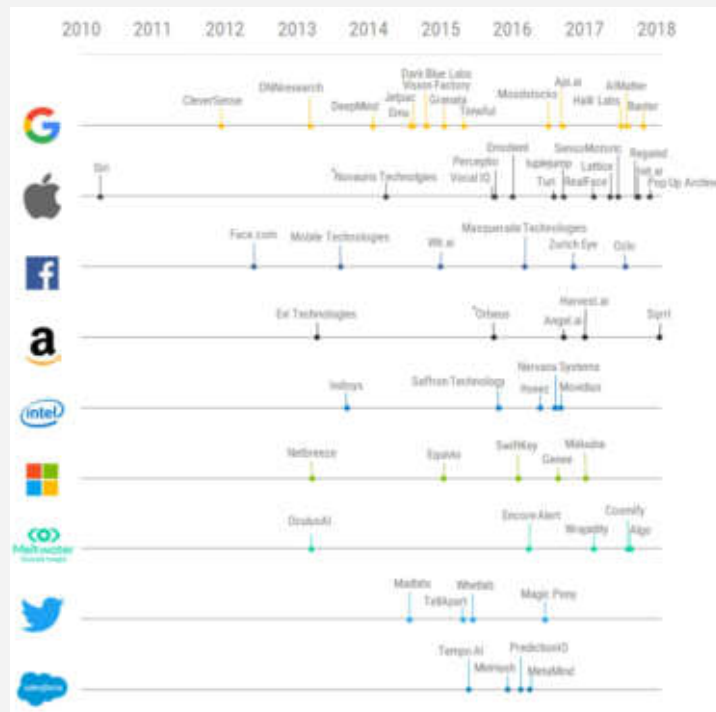
Deep Tech companies are now a primary acquisition target for tech giants

DEEP TECH M&A EXITS (2009/2018)



Source: Iterative.ai

DEEP TECH ACQUISITION BY TECH GIANTS (2010/2018)



Source: CB Insights

2000s-10s CORE COMPUTER SCIENCE INNOVATION

2020s CORE COMPUTER SCIENCE INNOVATION

Cloud computing



ethereum



VERISIGN



P2P Cryptography



elastic



mongoDB



vmware



DeepMind

RSA



GitHub

trax

Web 2.0

SD Networking



unity



nicira



APPDYNAMICS

dynamic
yield

SimilarWeb

AUTOMATION
ANYWHERE

etc...

2000s-10s CORE COMPUTER SCIENCE INNOVATION

2020s CORE COMPUTER SCIENCE INNOVATION

Themes

ADVANCED AI



WEB 3.0



ZKP/SMPC



EDGE & CLOUD

Lunar fills the investor gap for pre-traction Deep Tech startups

DEEP TECH

PRE-SEED

ef.

MIND THE DEEP TECH
GAP!

SEED

Blue
Yard

FLY VENTURES

serena
CAPITAL

IQ CAPITAL

Crane

F² M
Mosaic
Ventures

AIHREN

OSI
OSI
OSI

K

SILK

APEX
VENTURES

VITO VENTURES

OpenOcean

korelya
capital

Luminous Ventures

karma.vc

GENERALIST

H-FARM

kima
ventures

Point Nine

CONNECT
VENTURESfirstminute.
capital

sep

draper

esprit

BGF
VENTURESHIGHLAND
CAPITAL PARTNERS

Seedcamp

WM

hoxton ventures

passion
capital

DN Capital

LARS
STARBalderton
capitalACCEL
PARTNERS

G/ PARTECH

Northzone

info VENTURES

techstars

SPINLAB

piton
CAPITAL

KINOP

seed+speed
THE SALES VCWaking
Ventures

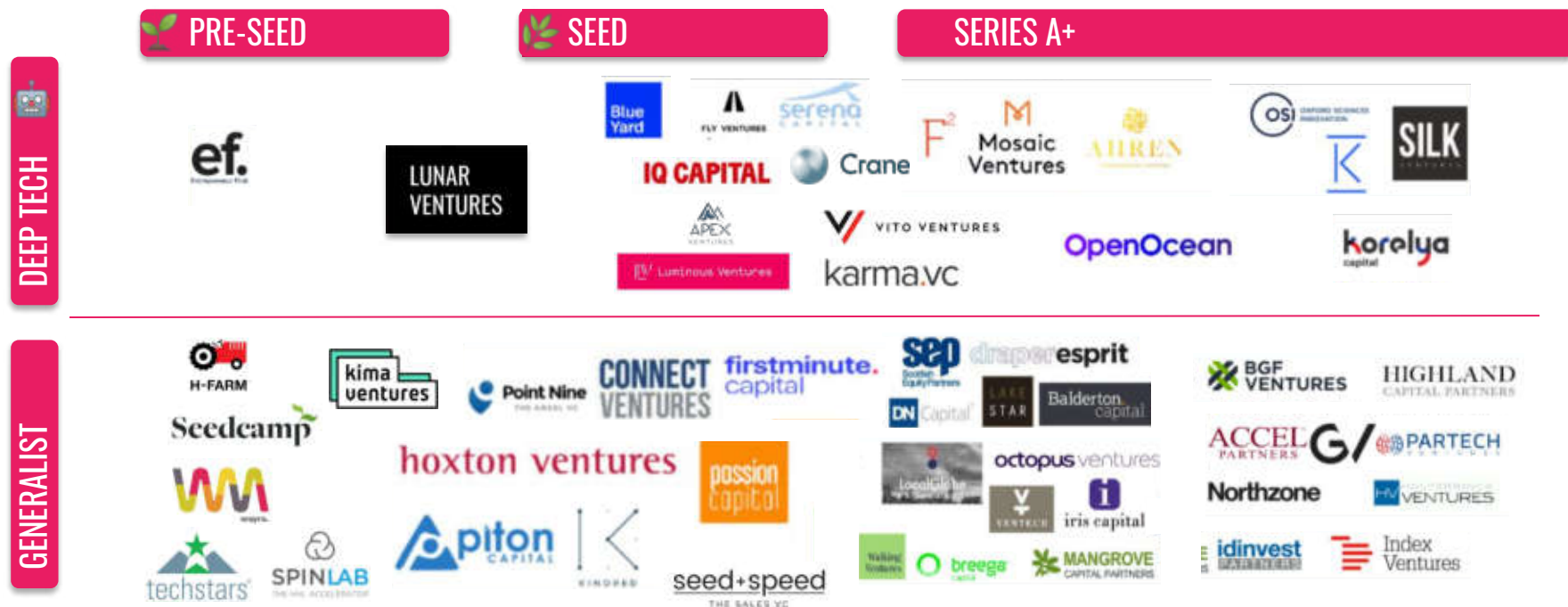
breega

MANGROVE
CAPITAL PARTNERS

idininvest

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Ventures

Lunar fills the investor gap for pre-traction Deep Tech startups





THANK YOU

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Credits:
Cloud by Jejen Juliansyah Nur
Agung from the Noun Project