



| Name | Action | Theme | Sub-Theme | Symbol | Current | | | Revenue | Gross Profit | Market Cap | EV | EV/S | |
|-------------------------|----------|-------------------|---------------|--------|----------|-----------|-----------|-----------|--------------|------------|----------|----------|------|
| | | | | | Price | Revs 2020 | Revs 2021 | Revs 2022 | Growth | Margin | | | (M) |
| Bentley Systems Inc | | XR/AR/VR | Construction | BSY | \$59.04 | \$802 | \$956 | \$1,087 | 19% | 79% | \$16,630 | \$17,783 | 18.6 |
| Agora Inc | | SW Infrastructure | Communication | API | \$22.85 | \$134 | \$161 | \$197 | 20% | 65% | \$2,648 | \$1,960 | 12.2 |
| Arlo Technologies Inc | | Broken Candy | Homes | ARLO | \$6.85 | \$357 | \$417 | \$462 | 17% | 16% | \$568 | \$389 | 0.9 |
| Avalara Inc | Graduate | SW Infrastructure | Commerce | AVLR | \$177.11 | \$501 | \$675 | \$833 | 35% | 71% | \$15,287 | \$14,824 | 22.0 |
| Coinbase Global Inc | | Crypto | Commerce | COIN | \$317.81 | \$1,277 | \$7,209 | \$6,585 | 464% | 89% | \$67,035 | \$64,577 | 9.0 |
| DraftKings Inc | Remove | Sports Betting | Commerce | DKNG | \$46.91 | \$615 | \$1,290 | \$1,796 | 110% | 44% | \$18,925 | \$17,634 | 13.7 |
| DocuSign Inc | Graduate | SW Infrastructure | Commerce | DOCU | \$275.50 | \$1,453 | \$2,086 | \$2,693 | 44% | 75% | \$54,196 | \$54,186 | 26.0 |
| Fathom Holdings Inc | | FinTech | Commerce | FTHM | \$25.00 | \$177 | \$301 | \$369 | 70% | 6% | \$370 | \$372 | 1.2 |
| Goosehead Insurance Inc | Graduate | FinTech | Commerce | GSHD | \$150.49 | \$117 | \$153 | \$214 | 31% | | \$2,979 | \$2,940 | 19.2 |
| HubSpot Inc | Graduate | SW Infrastructure | Enterprise | HUBS | \$79.28 | \$883 | \$1,271 | \$1,625 | 44% | 81% | \$37,476 | \$37,504 | 29.5 |
| WM Technology Inc | | SW Infrastructure | Cannabis | MAPS | \$12.28 | | \$201 | \$288 | 44% | | \$1,587 | \$1,477 | 7.4 |
| Matterport Inc | | SW Infrastructure | Real Estate | MTTR | \$20.17 | | \$118 | \$186 | 57% | | \$4,880 | \$4,598 | 38.8 |
| Schrodinger Inc | | BioTech | AI | SDGR | \$54.83 | \$108 | \$138 | \$219 | 28% | 59% | \$3,879 | \$3,286 | 23.7 |
| ShockWave Medical Inc | | MedTech | Devices | SWAV | \$211.05 | \$68 | \$223 | \$368 | 230% | 69% | \$7,418 | \$7,375 | 33.0 |
| Twilio Inc | Graduate | SW Infrastructure | Enterprise | TWLO | \$285.98 | \$1,762 | \$2,762 | \$3,609 | 57% | 52% | \$50,661 | \$45,535 | 16.5 |
| Unity Software Inc | | SW Infrastructure | Gaming | U | \$149.37 | \$772 | \$1,064 | \$1,342 | 38% | 78% | \$42,200 | \$40,244 | 37.8 |
| Workiva Inc | | SW Infrastructure | Enterprise | WK | \$147.84 | \$352 | \$431 | \$511 | 23% | 74% | \$7,463 | \$7,194 | 16.7 |
| Roblox Corp | | XR/AR/VR | Gaming | RBLX | \$84.93 | \$924 | \$2,677 | \$3,234 | 190% | 74% | \$48,848 | \$45,829 | 17.1 |