

Overview

Experienced private equity investors dedicated to partnering with owners and management teams in the lower middle market to drive growth and operational improvement

Business Attributes

- Market leader with a proprietary product, solid value proposition & brand value
- Above average market growth prospects
- Serving specialty channels
- End market / sector diversity
- Combination of manufactured product & global sourcing
- Barriers to entry
- New product development engine
- Manageable customer & supplier concentration
- Strong continuous improvement & safety culture
- Attractive gross margins with “value add” EBITDA margins



Representative Industries

- Aerospace & Defense
- Automotive Aftermarket
- Building Products
- Enthusiast Products
- Industrial Technology & Components
- Personal Protective Equipment & Apparel
- Process Automation
- Test & Measurement
- Water & Filtration

Situational / Operations Experience

- Management succession and transition
- Global sourcing and supply chain initiatives including operations in China, Mexico and Indonesia
- Executed 30+ strategic add-on acquisitions
- Strategic planning development and execution
- Expansion, re-design and re-direction of sales teams
- ERP, CRM and other critical systems implementations
- Greenfield facility expansions as well as warehouse consolidations

Investment Criteria

- Manufacturers & Distributors
- Industrial & Consumer Products
- Engineered Products & Services
- Under-Invested Companies
- Market Leaders with Clear Value Proposition & Barriers to Entry



EBITDA



Enterprise Value



HQ in North America

Representative Investment Experience

Auto Aftermarket



Enthusiast Products



Niche Manufacturing



Aerospace and Defense



Other Consumer



Watervale Team

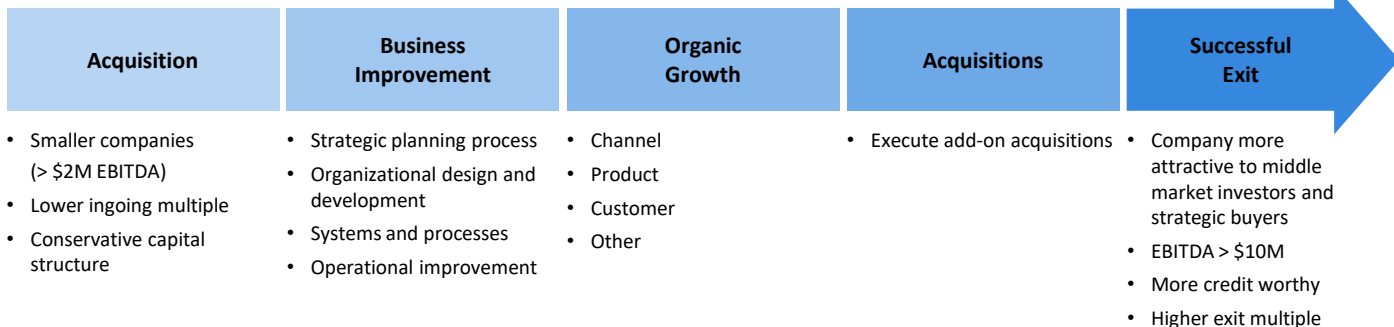
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30+ years of combined private equity experience

Investment Strategy



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