

Firm Snapshot

Focus	Fund III	Platforms	Add-ons	Team
Software	\$800M	20	22	40+
		7 Fund I; 10 Fund II; 3 Fund III	11 Fund I; 11 Fund II	

Platform Investment Criteria

	Software Category	- Specialized / vertical application software IT - Infrastructure and DevOps / DevTools software - Information / data / analytics software
	Business Profile	\$5-30M revenue, majority of which is recurring - Proven unit economics and gross margins but flexible on current profitability - Location agnostic across North America and Europe
	Deal Type	- Primarily focused on majority recapitalizations; will consider minority growth capital investments - Founder-owned businesses and institutionally-backed companies - Willing to evaluate complex situations (carve outs, take privates, etc.)

The Resurgens Approach

Our approach is grounded in a clear commitment to actively driving value creation across each of our portfolio companies. We don't adhere to a "one-size-fits-all" playbook—every company has its own unique challenges and opportunities. With that in mind, we have assembled one of the largest and most experienced operating teams, relative to our fund size and number of portfolio companies, that leverage their experience to drive operational improvements in conjunction with management. Key focus areas include:

Investment in Products/R&D	Alignment of World-Class Talent	Go-to-Market and Operations Support	M&A Strategy Execution
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To view the full RTP team, please visit: www.resurgenstech.com/team

Resurgens' Current Portfolio

Add-ons and Criteria



OfficeSpace Software offers a cloud-based platform for workplace and visitor management.

officespacesoftware.com

RTP initial investment

date: November 2019

Realization: partial recapitalization of the business in Jan. 2022 by Vista Equity Partners



Greetly was acquired by OfficeSpace in May 2023

Current Add-on Acquisition Criteria:

- Workplace management software focused on space and move management, visitor management and/or conference room booking
- Workplace / tenant experience solutions



GitKraken (f.k.a. Axosoft) provides cross-platform Git productivity and collaboration tools for developers, including GitKraken Client, Git Integration for Jira, and GitLens for VS Code.

gitkraken.com

RTP initial investment

date: August 2020



BigBrassBand was acquired by GitKraken in August 2021



GitLens was acquired by GitKraken in October 2021



CodeSee was acquired by GitKraken in May 2024

Current Add-on Acquisition Criteria:

- Git Productivity, Compliance and Analytics



EnergyCAP provides energy management solutions for government, education, and commercial sectors. Clients use its platform for utility bill processing, energy data tracking, greenhouse gas monitoring, benchmarking, budgeting, forecasting, and achieving sustainability goals.

energycap.com

RTP initial investment

date: March 2021



Wattics was acquired by EnergyCAP in August 2022

Current Add-on Acquisition Criteria:

- Utility bill mgmt. and energy analytics solution (European customer base preferred)
- Sustainability reporting



AgencyBloc provides agency management software for independent insurance agencies, offering an industry-specific agency management system and CRM, along with commissions processing and sales automation tools.

agencybloc.com

RTP initial investment

date: October 2021



FormFire was acquired by AgencyBloc in July 2022



Radius was acquired by AgencyBloc in November 2022

Current Add-on Acquisition Criteria:

- Agency mgmt. / CRM and sales and marketing automation products
- Insurance contracting and licensing, quoting and enrollment, illustration, and other ancillary products



Superna provides unstructured data management, protection, and security solutions for scale-out network-attached storage systems, designed to help IT teams efficiently manage and safeguard data.

superna.io

RTP initial investment

date: March 2022



DefendX was acquired by Superna in December 2023

Current Add-on Acquisition Criteria:

- Data mgmt., governance, orchestration and security solutions focused on unstructured data and hybrid IT environments



Case IQ provides case management software to support workplace investigation teams across industries to address cases spanning ethics and compliance, HR, fraud, security, complaints, etc.

caseiq.com

RTP initial investment date: April 2022



WhistleBlower Security was acquired by Case IQ in October 2023



Lextegrity was acquired by Case IQ in January 2025

Current Add-on Acquisition Criteria:

- HR-focused and other vertical specific case management solutions
- Issue intake solutions
- GRC solutions



Wellspring provides SaaS solutions for innovation and IP management, supporting best practices across the global R&D market. Its software helps academic institutions, corporations, and government agencies research, develop, and commercialize new technologies.

wellspring.com

RTP initial investment date: June 2022



IP Pragmatics was acquired by Wellspring in February 2023



Sopheon was acquired by Wellspring in February 2024

Current Add-on Acquisition Criteria:

- Innovation management products
- Tech scouting/data products
- Patent renewal service providers



Knack offers a no-code application development platform that allows businesses to build applications with drag-and-drop tooling.

knack.com

RTP initial investment date: June 2022

Current Add-on Acquisition Criteria:

- API/Integration suite
- Application components (reporting, visualization, OCR, etc.)
- Form builder solution



MCIM provides end-to-end maintenance, operations, and facility management software for mission-critical facilities, most notably data center environments.

mcim24x7.com

RTP initial investment date: December 2022

Current Add-on Acquisition Criteria:

- Facility mgmt. (FMS), enterprise asset mgmt. (EAM) and/or computerized maintenance mgmt. (CMMS) software, particularly for critical infrastructure environments
- Data center infrastructure management (DCIM) software
- Commissioning and site selection solutions / data products focused on the global data center market

Resurgens' Current Portfolio

Add-ons and Criteria



Detection Technologies provides remote asset monitoring and optimization software for the upstream and midstream oil and gas industry.

detection.com

RTP initial investment date: June 2023



EZ Ops was acquired by Detection in July 2024.

Current Add-on Acquisition Criteria:

- Remote asset monitoring, optimization, or field mobility focused on upstream and midstream oil and gas



Valant offers an EHR and practice management software platform for behavioral health professionals in solo and group practices.

valant.io

RTP initial investment date: November 2023



ProHealthDesk was acquired by Valant in July 2024.

Current Add-on Acquisition Criteria:

- Revenue cycle mgmt. offerings focused on behavioral health
- Adjacent practice mgmt. / EHR products in sub-segments such as substance abuse, ABA, etc.



Avantra is an observability and automation solution to help companies manage their SAP environments more effectively and efficiently.

avantra.com

RTP initial investment date: September 2024

Current Add-on Acquisition Criteria:

- IT infrastructure and data governance solutions focused on SAP



Relay provides K-12 school districts with a workflow solution to document school-based services, verify compliance with government standards, submit Medicaid claims, and drive visibility and insights.

relayhub.com

RTP initial investment date: October 2024



Educational Advantage was acquired by Relay in May 2025.



Timberline was acquired by Relay in November 2025.

Current Add-on Acquisition Criteria:

- School-based service documentation and Medicaid billing solutions
- Adjacent software solutions with a focus on special education departments or other specialized services (mental health, nursing, speech, PT, OT, etc.)



movemedical.com

RTP initial investment
date: October 2024

Movemedical provides a software platform to enable medical device manufacturers to better manage their field inventory, surgical case scheduling and billing, and the "order-to-revenue" lifecycle for high-value, consumable medical devices.

Current Add-on Acquisition Criteria:

- Supply chain and inventory management solutions for medical devices, serving both medical device manufacturers and/or healthcare providers



theorgchart.com

RTP initial investment
date: January 2026

OrgChart is a leading organizational chart automation and workforce planning solution, built for HR professionals and the people leaders they support. OrgChart simplifies the complexity of HR work, providing unparalleled visibility into an organization's personnel, and surfacing valuable insights for strategic decisions about future organizational structures.

Current Add-on Acquisition Criteria:

- Workforce planning
- Compensation management
- Performance management



breezeway.io

RTP initial investment
date: March 2026

Breezeway is the leading operations platform for vacation rentals, built to coordinate and elevate the work behind five-star guest experiences. Breezeway's AI-powered workflows automate and control the service touch points that matter most, empowering property managers to deliver on time, to the highest standards, and with a human touch.

Current Add-on Acquisition Criteria:

- Operations & guest experience software, primarily serving short-term rental property managers



qarmainspect.com

RTP initial investment
date: August 2026

Qarma is an AI-powered quality and compliance platform that helps brands, retailers, sourcing companies, and manufacturers transform verified operational data into predictive intelligence across global supply chains. By bringing together quality inspections, supplier performance, and product compliance in a single platform, Qarma enables companies to prevent quality issues, reduce risk, and make smarter decisions.

Current Add-on Acquisition Criteria:

- Supply chain and product compliance solutions

Realizations



invmetrics.com

RTP initial investment

date: June 2017

Realization: sale of business in Dec. 2022 to Confluence, backed by Clearlake and TA Associates

Investment Metrics provides investment performance analytics and reporting solutions for the institutional investment industry, enabling professionals to analyze and report on over \$10 trillion in assets with accuracy and efficiency.



InvestorForce was acquired by Investment Metrics in a carve-out from MSCI in October 2018



Style Analytics was acquired by Investment Metrics in December 2020



castellanbc.com

RTP initial investment

date: May 2018

Realization: sale of business in July 2022 to Riskconnect, backed by TA Associates and Thoma Bravo

Castellan Solutions is a global provider of business continuity software and services. Its configurable SaaS applications help businesses mitigate risk, manage recovery, and safeguard operations, employees, and brands.



Clearview was acquired by Castellan in December 2018



Avolution was acquired by Castellan in April 2020



verityplatform.com

RTP initial investment

date: May 2019

Realization: sale of business in Oct. 2025 to TMX Group

Verity (f.k.a. MackeyRMS) provides SaaS-based research management software and financial data services for buy-side investment professionals, including asset managers, hedge funds, and asset owners.



InsiderScore was acquired by Verity in December 2020