

NEWS RELEASE



Dr. Stephan Wessel
CEO
Montana Capital Partners



Vinti Khanna
Managing Director,
Head of Alternative Assets
PSS

CONNECT WITH US:

Visit mcp.eu

Follow on [LinkedIn](#)

Montana Capital Partners announces landmark deal with PFI.

BAAR-ZUG, Switzerland, 3rd April 2025 – Montana Capital Partners (mcp) has acquired a substantial private equity portfolio from Prudential Financial, Inc. (PFI), a global financial services company based in the US. mcp is an established mid-market global private equity secondaries investment manager and part of PGIM Private Alternatives, the US\$330 billion private alternatives strategies manager of PGIM, the global asset manager of PFI.¹

The deal portfolio consists of mid-market inflection buyout assets across a number of funds and co-investments and has been acquired on behalf of mcp’s most recent edition of the Opportunities Secondary Program (OSP) and select mcp co-investors.

“The nature of this transaction makes it a landmark deal in the middle market”, **Dr. Stephan Wessel, CEO and managing partner of mcp**, commented. “We were able to apply our data-driven underwriting approach to identify assets that align with mcp’s investment criteria while meeting PFI’s portfolio rebalancing objective. This kind of partnership, providing such a highly customized portfolio management solution, is unique and likely to be a model replicated in the future.

“This deal underscores the benefit of PGIM’s collaborative approach and the value of being part of the PFI platform and is a key step in what we hope will be a long-term partnership between mcp and PFI’s CIO team”, Wessel added.

The portfolio will continue to be managed by Prudential Select Strategies (PSS), a subsidiary of PFI, managing approximately US\$18 billion in alternative assets for PFI and third-party investors.¹

“Following PFI’s strategic asset allocation targets, this transaction allows us to pursue additional value enhancing investments, while retaining ownership of our general partner relationships”, **Vinti Khanna, managing director, head of alternative assets at PSS**, added. “At the same time, this deal supports our efforts in leveraging our investment capabilities as an independent fiduciary manager.”

MEDIA CONTACT

Paul René Frigo

+49 (0)69 244 341 730

paul.frigo@pgim.com

ABOUT MCP

Montana Capital Partners AG (“mcp”) is an established global private equity secondaries investment manager with a focus on the mid-market. As an adviser or a delegated portfolio manager to six funds, i.e., the Opportunity Secondary Program, mcp (together with its affiliates) advises/manages total assets of US\$3.9 billion for its investors.²

mcp pursues a differentiated investment approach providing customized liquidity solutions in the secondary mid-market with a focus on proactive sourcing and a balanced portfolio construction across GP-led and LP-led transactions. mcp employs more than 40 professionals across its offices in Baar, Switzerland, and New York and has invested in more than 130 transactions since its inception.

mcp is part of PGIM, the global investment management business of PFI. (NYSE: PRU) with US\$1.38 trillion in assets under management, including more than US\$330 billion in private alternatives strategies,¹ benefiting from its combined market positioning and global footprint. For more information visit mcp.eu.

ABOUT PGIM

[PGIM](http://pgim.com) is the global asset management business of PFI. (NYSE: PRU). In 41 offices across 19 countries, our more than 1,450 investment professionals serve both retail and institutional clients around the world.

As a leading global asset manager with US\$1.38 trillion in assets under management,¹ PGIM is built on a foundation of strength, stability, and disciplined risk management. Our multi-affiliate model allows us to deliver specialized expertise across key asset classes with a focused investment approach. This gives our clients a diversified suite of investment strategies and solutions with global depth and scale across public and private asset classes, including fixed income, equities, real estate, private credit, and other alternatives. For more information visit pgim.com.

Prudential Financial, Inc. (PFI) of the United States is not affiliated in any manner with Prudential plc, incorporated in the United Kingdom, or with Prudential Assurance Company, a subsidiary of M&G plc, incorporated in the United Kingdom. For more information please visit news.prudential.com.

¹ As of 31 Dec. 2024.

² As of 30 June 2024. Figure includes funds raised as of 31 Oct. 2024.

For media use only. All investments involve risk, including the possible loss of capital.

These materials are not intended as an offer or solicitation with respect to the purchase or sale of any security or other financial instrument or any investment management services and should not be used as the basis for any investment decision. No liability whatsoever is accepted for any loss (whether direct, indirect, or consequential) that may arise from any use of the information contained in or derived from this report.

Past performance is not a guarantee or reliable indicator of future results. Performance is defined as outperformance (net of fees) relative to each individual strategy’s respective benchmark(s). Net performance reflects the deduction of investment advisory fees and other expenses incurred in the management of advisory accounts. Performance fees vary across the PGIM and PSS businesses and reduce an investor’s net return.

The opinions expressed in this article are those of the author(s) and do not reflect the views or opinions of PGIM Inc. or PSS. PGIM Inc. and PSS are not responsible for, nor do they endorse nor confirm, accuracy of the opinions. All trademarks and other intellectual property used or displayed are the ownership of their respective owners. Unless noted otherwise in this article, PGIM Inc. and PSS are not affiliated with, nor do they endorse any mentioned company or any linked third-party content.

PGIM and its affiliates may develop and publish research that is independent of, and different than, the recommendations contained herein. PGIM and PSS' personnel other than the author(s), such as sales, marketing and trading personnel, may provide oral or written market commentary or ideas to their clients or prospects or proprietary investment ideas that differ from the views expressed herein.

In the United Kingdom, information is issued by PGIM Private Alternatives (UK) Limited with registered office: Grand Buildings, 1-3 Strand, Trafalgar Square, London, WC2N 5HR. PGIM Private Alternatives (UK) Limited is authorized and regulated by the Financial Conduct Authority ("FCA") of the United Kingdom (Firm Reference Number 181389). These materials are issued by PGIM Private Alternatives (UK) Limited to persons who are professional clients as defined under the rules of the FCA. In the European Economic Area ("EEA"), information is issued by PGIM Luxembourg S.A. with registered office: 2, boulevard de la Foire, L1528 Luxembourg. PGIM Luxembourg S.A. is authorized and regulated by the Commission de Surveillance du Secteur Financier in Luxembourg (registration number A00001218) and operating on the basis of a European passport. In certain EEA countries, this information, where permitted, is presented by PGIM Limited in reliance of provisions, exemptions, or licenses available to PGIM Limited under the temporary permission arrangements following the exit of the United Kingdom from the European Union. PGIM Limited has its registered office: Grand Buildings, 1-3 Strand, Trafalgar Square, London WC2N 5HR. PGIM Limited is authorized and regulated by the Financial Conduct Authority ("FCA") of the United Kingdom (Firm Reference Number: 193418). These materials are issued by PGIM Luxembourg S.A. and/or PGIM Limited to persons who are professional clients as defined in the relevant local implementation of Directive 2014/65/EU (MiFID II) and/or to persons who are professional clients as defined under the rules of the FCA.

THE PURSUIT OF OUTPERFORMANCE