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*The Carlyle Group: IPO
of a Publicly Traded
Private Equity Firm*

Introduction

The IPO is such an important event that even Carlyle Group signifies it in the financial calendar. When it went public, it introduced significant questions in relation to the strategic development of these private equity firms, their organisational frameworks, and whether the concept of a public private equity firm was possible or not.



Background

The Carlyle Group was established in 1987 and transformed into a leading world company in private equity and investment funds; it controls assets in many spheres including aerospace/defense, and technology. Carlyle had a good investment portfolio; it was among the most influential firm in private equity due to the high returns that the firm used to post.



Going Public

The change of status from a private limited company to a public limited had its own set of problems for Carlyle. One of the issues that emerged was how to reunify public shareholders who required shareholder value and operational freedom, which private equity firms usually have.



Conclusion

Carlyle Group IPO was a landmark event in the history of the private equity. This case study also demonstrates how firms, such as Carlyle, could manage the emergence of change that is associated with a new financial structure of public shareholding. The case also provides important insights into the conceptual and practical issues arising in conceptualizing the transition from private equity to an IPO



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