

**BLACKROCK CAPITAL INVESTMENT CORPORATION**

**BlackRock®**

# **Investor Presentation**

**March 2020**

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The following slides contain summaries of certain financial and statistical information about the Company. The information contained in this presentation is summary information that is intended to be considered in the context of our SEC filings and other public announcements that we may make, by press release or otherwise, from time to time. In addition, information related to past performance, while helpful as an evaluative tool, is not necessarily indicative of future results, the achievement of which cannot be assured. You should not view the past performance of the Company, or information about the market, as indicative of the Company’s future results.

# BlackRock Capital Investment Corporation Overview

**BlackRock Capital Investment Corporation (NASDAQ: BKCC) is a publicly traded and externally-managed BDC (business development company).**

- Provides middle-market companies with flexible financing solutions, including senior and junior secured and unsecured debt securities, as well as equity securities.
- Seeks and invests in opportunities which offer an attractive risk-adjusted return, while creating long-term partnerships with growing middle-market companies.
- Managed by a wholly owned indirect subsidiary<sup>14</sup> of BlackRock, Inc. (“BlackRock”) since March 6, 2015. BlackRock is the largest asset manager globally with approximately \$7.4 trillion under management, as of December 31, 2019.
- Under BlackRock’s management, from March 6, 2015 to December 31, 2019, we have deployed capital of approximately \$1.3 billion, of which \$421 million has been exited with a realized IRR of 14.1%.
- Experienced investment team possesses strong sourcing capabilities and sponsor relationships, employs rigorous bottom-up investment analysis and possesses restructuring/M&A skill set.
- BlackRock’s scope and scale enhances sourcing channels and provides informational advantage via company, sector and macro level insights.
- Integration of Tennenbaum Capital Partners into BlackRock is helping add value for shareholders through increased deal flow, added industry-specific expertise and increased diversity in portfolio construction.
- Evaluated over 4,700 investment opportunities since inception.
- Completed investments in 215 portfolio companies since inception.
- Has provided in excess of \$5.0 billion in capital to middle-market companies since inception.

## Key Metrics as of December 31, 2019

**Investment Portfolio<sup>6</sup>:**  
\$749.9 million

**Dividend Yield<sup>9</sup>:**  
11.3%

**Net Assets:**  
\$435.6 million or \$6.33 per share<sup>4</sup>

**Share Price:**  
\$4.97

**Quarterly Distribution Coverage<sup>10</sup>:**  
100%

**Market Capitalization:**  
\$342.1 million

Please see Notes to the Investor Presentation on page 13.

# Select Historical Financial Information

(\$ in Thousands, Except per Share Data)	Quarter Ended					Full Year Ended	Full Year Ended
	12/31/18	3/31/19	6/30/19	9/30/19	12/31/19	12/31/18	12/31/19
Net Investment Income / (Loss)	\$ 11,784	\$ 11,404	\$ 11,230	\$ 9,637	\$ 9,637	\$ 47,431	\$ 41,908
Net Investment Income / (Loss) per share <sup>1</sup>	0.17	0.17	0.16	0.14	0.14	0.66	0.61
Net Investment Income / (Loss), pre-incentive fee <sup>3</sup>	11,784	11,404	11,230	10,510	10,614	47,431	43,758
Net Investment Income / (Loss) per share, pre-incentive fee <sup>1,3</sup>	0.17	0.17	0.16	0.15	0.15	0.66	0.64
Net Investment Income / (Loss), as adjusted <sup>3</sup>	11,784	11,404	11,230	9,637	9,637	47,431	41,908
Net Investment Income / (Loss) per share, as adjusted <sup>1,3</sup>	0.17	0.17	0.16	0.14	0.14	0.66	0.61
Net Realized / Unrealized Gains (Losses) before taxes <sup>13</sup>	(46,428)	6,565	(21,819)	(22,329)	(11,211)	(56,594)	(48,795)
Net Realized / Unrealized Gains (Losses) before taxes per share <sup>1</sup>	(0.66)	0.09	(0.31)	(0.32)	(0.16)	(0.79)	(0.71)
Net Increase / (Decrease) in Net Assets from Operations	(32,423)	17,969	(10,589)	(12,692)	(1,574)	(9,162)	(6,887)
Net Increase / (Decrease) in Net Assets from Operations per share <sup>1</sup>	(0.46)	0.26	(0.15)	(0.18)	(0.02)	(0.13)	(0.10)
Net Increase / (Decrease) in Net Assets from Operations, as adjusted <sup>3</sup>	(32,423)	17,969	(10,589)	(12,692)	(1,574)	(9,162)	(6,887)
Net Increase / (Decrease) in Net Assets from Operations per share, as adjusted <sup>1</sup>	(0.46)	0.26	(0.15)	(0.18)	(0.02)	(0.13)	(0.10)
Net Assets	487,020	492,129	469,149	446,820	435,609	487,020	435,609
Net Asset Value per share <sup>4</sup>	\$ 7.07	\$ 7.15	\$ 6.82	\$ 6.49	\$ 6.33	\$ 7.07	\$ 6.33
Distributions Declared	12,552	12,391	12,391	9,637	9,637	51,269	44,055
Distributions Declared per share	\$ 0.18	\$ 0.18	\$ 0.18	\$ 0.14	\$ 0.14	\$ 0.72	\$ 0.64
Weighted Average Shares - Basic <sup>1</sup>	69,835,855	68,837,612	68,836,255	68,836,255	68,836,255	71,373,570	68,836,255
Shares Outstanding at End of Period	68,921,798	68,836,255	68,836,255	68,836,255	68,836,255	68,921,798	68,836,255
Distribution Coverage <sup>10</sup>	94%	92%	91%	100%	100%	93%	95%
Net Leverage <sup>5</sup>	0.36x	0.37x	0.53x	0.61x	0.70x	0.36x	0.70x

Items above may not foot due to rounding.

Please see Notes to the Investor Presentation on page 13.

# Portfolio Activity

(\$ in Millions)	Quarter Ended				
	12/31/18	3/31/19	6/30/19	9/30/19	12/31/19
New Investments at Cost <sup>2,11</sup>	\$ 32.0	\$ 58.0	\$ 105.6	\$ 66.8	\$ 73.0
Proceeds from Sales, Repayments and Other Exits <sup>11</sup>	(94.7)	(55.7)	(45.6)	(37.4)	(38.1)
Net New Investments	\$ (62.7)	\$ 2.3	\$ 60.0	\$ 29.4	\$ 34.9
Number of Portfolio Companies - Beginning of Period	28	27	28	38	43
Number of New Portfolio Company Investments	1	3	12	5	5
Number of Portfolio Company Exits	(2)	(2)	(2)	-	(1)
Number of Portfolio Companies - End of Period	27	28	38	43	47
<u>New Investments by Asset Class at Cost (\$):</u>					
Senior Secured 1st Lien Debt	\$ 3.6	\$ 12.7	\$ 61.6	\$ 52.8	\$ 23.8
Senior Secured 2nd Lien Debt	15.3	20.6	37.5	8.7	12.4
Subordinated / Unsecured Debt	12.4	23.9	6.1	4.9	36.8 *
Preferred Equity	0.7	0.7	-	-	-
Common Equity & Other	-	0.1	0.4	0.4	-
<u>New Investments by Asset Class at Cost (%):</u>					
Senior Secured 1st Lien Debt	11.3%	21.9%	58.3%	79.1%	32.5%
Senior Secured 2nd Lien Debt	47.7%	35.5%	35.5%	13.0%	17.0%
Subordinated / Unsecured Debt	38.8%	41.2%	5.8%	7.3%	50.5% *
Preferred Equity	2.2%	1.2%	0.0%	0.0%	0.0%
Common Equity & Other	0.0%	0.2%	0.4%	0.6%	0.0%

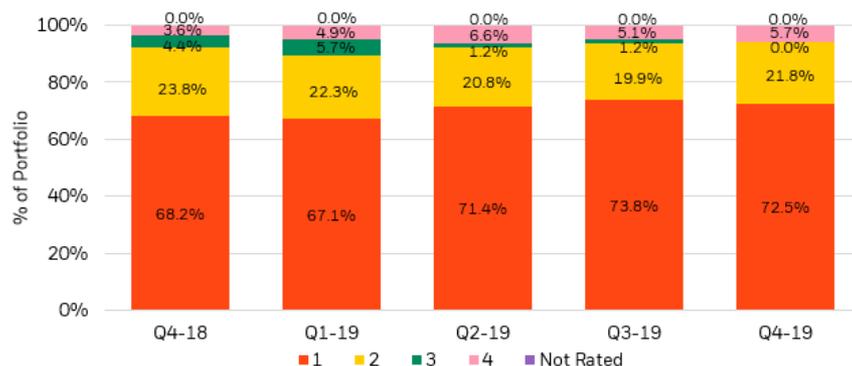
\*For the quarter ended December 31, 2019, of the \$36.8 million new investments in subordinated/unsecured debt, \$36.4 million pertained to gross deployment in Gordon Brothers Finance Company ("GBFC") unsecured debt. During the quarter, the Company also received \$16.9 million of repayments on GBFC unsecured debt. Therefore, the net deployment in GBFC unsecured debt for the quarter was \$19.5 million.

Please see Notes to the Investor Presentation on page 13.

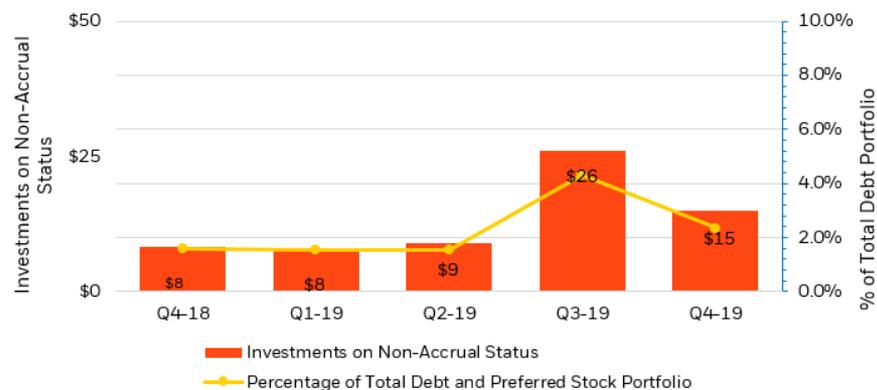
# Portfolio Status

(\$ in Millions)	Quarter Ended				
	12/31/18	3/31/19	6/30/19	9/30/19	12/31/19
Investment Portfolio at Cost <sup>6</sup>	\$ 753	\$ 755	\$ 792	\$ 821	\$ 856
Investment Portfolio at Fair Value <sup>6</sup>	672	680	719	726	750
Fair Value % Cost	89.2%	90.1%	90.7%	88.4%	87.6%
Number of Portfolio Companies	27	28	38	43	47
Average Investment Size at Cost	\$ 27.9	\$ 27.0	\$ 20.8	\$ 19.1	\$ 18.2
<i>Portfolio by Asset Class at Fair Value:</i>					
Senior Secured 1st Lien Debt	\$ 159	\$ 170	\$ 197	\$ 243	\$ 252
Senior Secured 2nd Lien Debt	155	148	183	171	176
Subordinated / Unsecured Debt	159	157	150	151	167
Preferred Equity	45	46	43	43	40
Common Equity & Other	154	159	146	118	115
Yield on Income Producing Securities at Cost	11.1%	11.3%	11.6%	10.8%	10.7%
Yield on Senior Secured Loans at Cost	10.3%	10.0%	10.8%	10.3%	10.2%
Yield on Other Debt Securities at Cost	12.6%	12.6%	12.5%	10.8%	10.8%
Yield on Income Producing Securities at Fair Value	11.5%	11.7%	11.7%	11.0%	10.9%
Yield on Senior Secured Loans at Fair Value	11.0%	10.7%	10.8%	10.3%	10.2%
Yield on Other Debt Securities at Fair Value	12.7%	12.7%	12.7%	11.4%	11.8%

### Portfolio by Internal Investment Rating (by FMV)



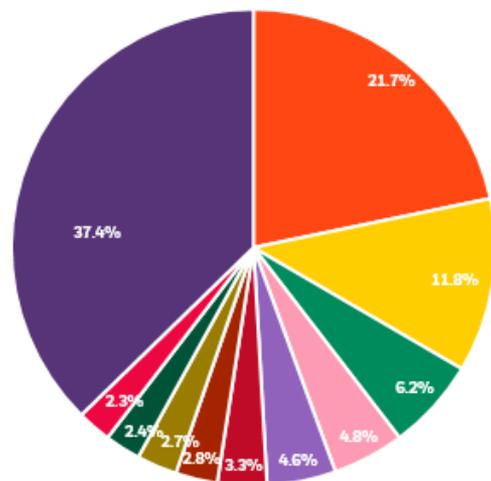
### Portfolio by Non-Accrual Status (by FMV)



Please see Notes to the Investor Presentation on page 13.

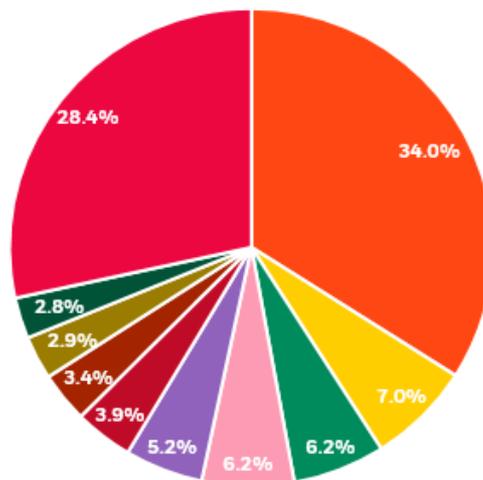
# Portfolio Composition at Fair Value at 12/31/2019

Portfolio Composition by Issuer



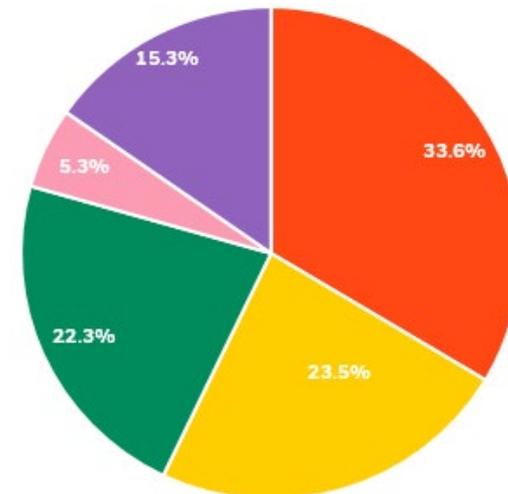
- Gordon Brothers Finance Company
- BCIC Senior Loan Partners
- First Boston Construction Holdings, LLC
- St. George Warehousing & Trucking Co.
- AGY Holding Corp.
- Zest Acquisition Corp.
- Paragon Films, Inc.
- Sur La Table, Inc.
- Red Apple Stores Inc.
- Vertellus Specialties Inc.
- Other

Portfolio Composition by Industry<sup>16</sup>



- Diversified Financial Services
- Chemicals
- Thrifts & Mortgage Finance
- Road & Rail
- Health Care Equipment & Supplies
- Health Care Providers & Services
- Software
- Energy Equipment & Services
- Containers & Packaging
- Other

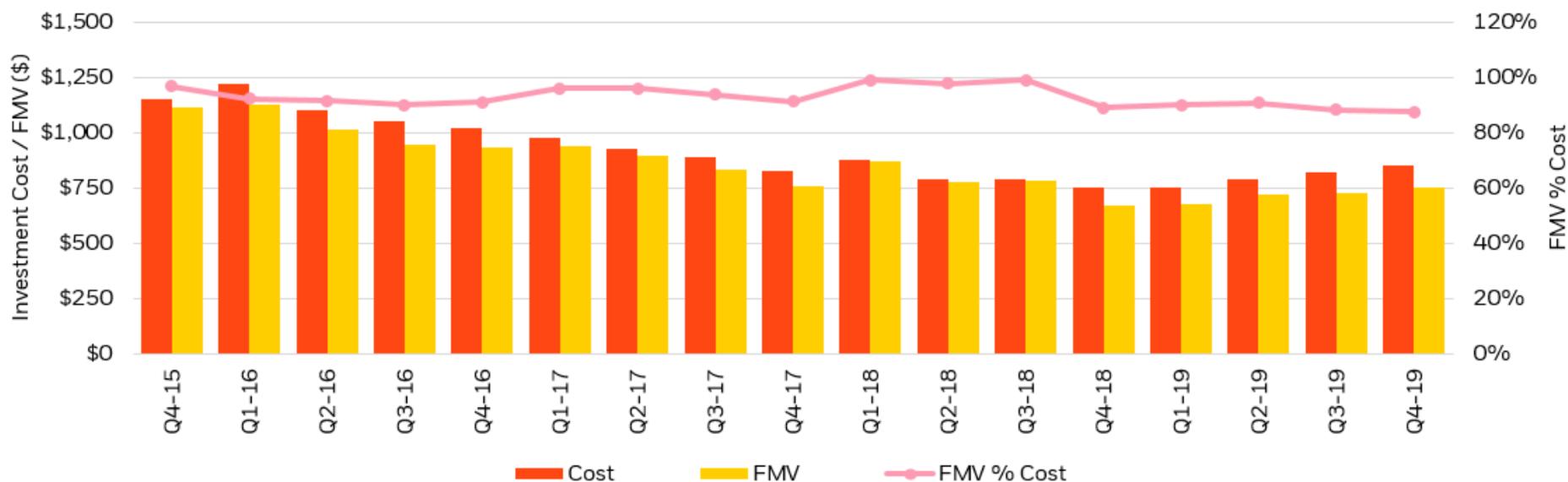
Portfolio Composition by Asset Class



- Senior Secured 1st Lien Debt
- Senior Secured 2nd Lien Debt
- Subordinated / Unsecured Debt
- Preferred Equity
- Common Equity & Other

# Portfolio Evolution

## Investment Cost / FMV



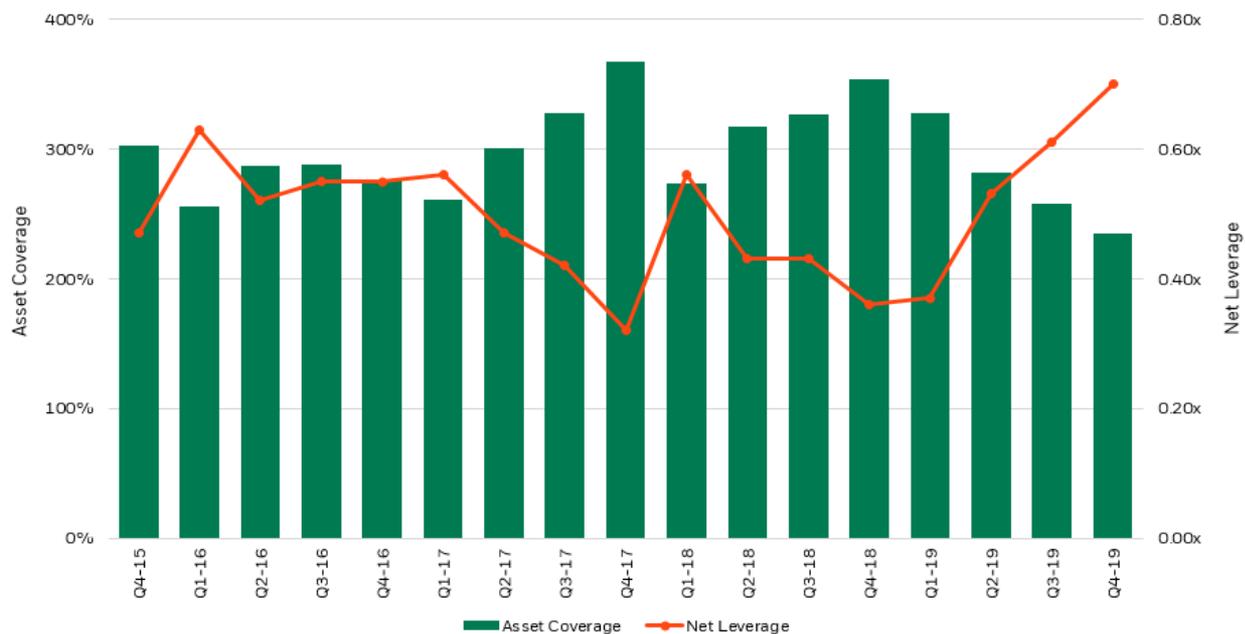
(\$ in Millions, Except per Share Data)

	Q4-15	Q1-16	Q2-16	Q3-16	Q4-16	Q1-17	Q2-17	Q3-17	Q4-17	Q1-18	Q2-18	Q3-18	Q4-18	Q1-19	Q2-19	Q3-19	Q4-19
Cost	\$1,153	\$1,219	\$1,105	\$1,050	\$1,022	\$978	\$929	\$890	\$829	\$877	\$793	\$787	\$753	\$755	\$792	\$821	\$856
FMV	1,117	1,126	1,012	947	931	939	893	834	758	870	776	781	672	680	719	726	750
FMV % Cost	97%	92%	92%	90%	91%	96%	96%	94%	91%	99%	98%	99%	89%	90%	91%	88%	88%
NAV per share <sup>a</sup>	\$10.17	\$9.46	\$9.13	\$8.38	\$8.21	\$8.22	\$8.33	\$7.96	\$7.83	\$7.65	\$7.56	\$7.66	\$7.07	\$7.15	\$6.82	\$6.49	\$6.33

Please see Notes to the Investor Presentation on page 13.

# Leverage Profile

Quarterly Leverage Metrics



(\$ in Millions)	Q4-15	Q1-16	Q2-16	Q3-16	Q4-16	Q1-17	Q2-17	Q3-17	Q4-17	Q1-18	Q2-18	Q3-18	Q4-18	Q1-19	Q2-19	Q3-19	Q4-19
FMV	\$1,117	\$1,126	\$1,012	\$947	\$931	\$939	\$ 893	\$ 834	\$ 758	\$ 870	\$ 776	\$ 781	\$ 672	\$ 680	\$ 719	\$ 726	\$ 750
Borrowings	364	443	350	323	337	372	300	251	211	314	245	236	190	212	255	279	316
Borrowings % FMV	33%	39%	35%	34%	36%	40%	34%	30%	28%	36%	32%	30%	28%	31%	36%	38%	42%
Asset Coverage Ratio <sup>7</sup>	302%	255%	287%	288%	275%	260%	300%	327%	367%	273%	317%	326%	354%	328%	282%	258%	235%
Net Leverage <sup>5</sup>	0.47x	0.63x	0.52x	0.55x	0.55x	0.56x	0.47x	0.42x	0.32x	0.56x	0.43x	0.43x	0.36x	0.37x	0.53x	0.61x	0.70x

- Asset coverage ratio<sup>7</sup> of 235% represents a \$112.1 million cushion to the minimum required ratio of 200% (or 150% under certain circumstances) per BDC regulations.
- Undrawn credit facility amount of \$165.6 million as of 12/31/19.

Please see Notes to the Investor Presentation on page 13.

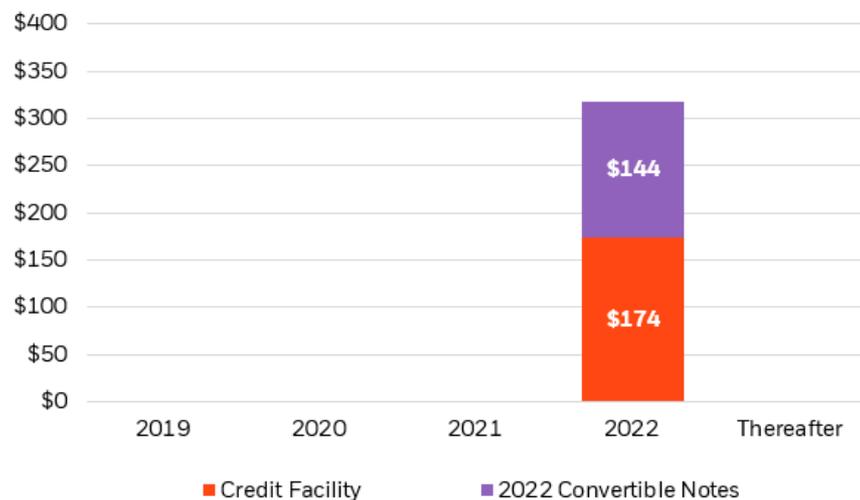
# Debt Summary

## Summary of Borrowings

(\$ in Millions)

Security	Amount as of 09/30/2019		Amount as of 12/31/2019		Rate	Maturity
	Available	Outstanding	Available	Outstanding		
Senior Secured Revolving Credit Facility <sup>8</sup>	\$340	\$137	\$340	\$174	L + 1.75% - 2.00%	2022
Unsecured Convertible Notes 2022 <sup>12</sup>	144	144	144	144	5.00%	2022
<b>Total</b>	<b>\$484</b>	<b>\$281</b>	<b>\$484</b>	<b>\$318</b>		

## Debt Maturity Profile



## Comparison of Debt Investments and Borrowings

	Amount as of 12/31/2019	
	Debt Investments, at FMV	Borrowings
<i>Percentage of Total Amount Outstanding:</i>		
Fixed Rate Securities	17.6%	45.2%
Floating Rate Securities	82.4%	54.8%
Weighted Average Yield <sup>15</sup>	10.7%	4.3%
Weighted Average Years to Maturity	3.8	2.4

Please see Notes to the Investor Presentation on page 13.

# Reconciliation of Net Investment Income/(Loss)

(\$ in Thousands, Except per Share Data)	Q4 2018		Q1 2019		Q2 2019		Q3 2019		Q4 2019		2018		2019	
	(\$)	Per Share												
<b>GAAP Basis:</b>														
Net Investment Income / (Loss)	\$ 11,784	\$ 0.17	\$ 11,404	\$ 0.17	\$ 11,230	\$ 0.16	\$ 9,637	\$ 0.14	\$ 9,637	\$ 0.14	\$ 47,431	\$ 0.66	\$ 41,908	\$ 0.61
Net Increase / (Decrease) in Net Assets from Operations	(32,423)	(0.46)	17,969	0.26	(10,589)	(0.15)	(12,692)	(0.18)	(1,574)	(0.02)	(9,162)	(0.13)	(6,887)	(0.10)
Addback: GAAP incentive management fee expense based on Gains	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Addback: GAAP incentive management fee expense based on Income net of incentive management fee waiver	-	-	-	-	-	-	873	0.01	977	0.01	-	-	1,850	0.03
<b>Pre-Incentive Fee<sup>3</sup></b>														
Net Investment Income / (Loss)	\$ 11,784	\$ 0.17	\$ 11,404	\$ 0.17	\$ 11,230	\$ 0.16	\$ 10,510	\$ 0.15	\$ 10,614	\$ 0.15	\$ 47,431	\$ 0.66	\$ 43,758	\$ 0.64
Net Increase / (Decrease) in Net Assets from Operations	(32,423)	(0.46)	17,969	0.26	(10,589)	(0.15)	(11,819)	(0.17)	(597)	(0.01)	(9,162)	(0.13)	(5,037)	(0.07)
Less: Incremental incentive management fee expense based on Income net of incentive management fee waiver	-	-	-	-	-	-	(873)	(0.01)	(977)	(0.01)	-	-	(1,850)	(0.03)
<b>As Adjusted<sup>3</sup></b>														
Net Investment Income / (Loss)	\$ 11,784	\$ 0.17	\$ 11,404	\$ 0.17	\$ 11,230	\$ 0.16	\$ 9,637	\$ 0.14	\$ 9,637	\$ 0.14	\$ 47,431	\$ 0.66	\$ 41,908	\$ 0.61
Net Increase / (Decrease) in Net Assets from Operations	(32,423)	(0.46)	17,969	0.26	(10,589)	(0.15)	(12,692)	(0.18)	(1,574)	(0.02)	(9,162)	(0.13)	(6,887)	(0.10)

Note: The Company incurred incentive fees based on income of \$2,122,796 and \$8,751,521, for the three months and year ended December 31, 2019, respectively. Our advisor has waived incentive fees of \$1,145,894 and \$6,901,924, for the three months and year ended December 31, 2019, respectively. This resulted in net incentive fees based on income of \$976,902 and \$1,849,597, for the three months and year ended December 31, 2019, respectively. The payment of incentive fees based on income of \$1,849,597 during the year was deferred in accordance with the investment management agreement.

Items above may not foot due to rounding.

Please see Notes to the Investor Presentation on page 13.

# Internal Investment Rating System Overview

**BlackRock Capital Investment Advisors, LLC (the “Advisor”)<sup>14</sup> employs a grading system for its entire portfolio in which all loans are rated on a scale of 1 to 4. This system is intended to reflect the performance of the borrower’s business, the collateral coverage of the loans and other factors considered relevant. The following is a description of the conditions associated with each investment rating:**

- **Grade 1:** Investments in portfolio companies whose performance is substantially within Advisor’s expectations and whose risk factors are neutral to favorable to those at the time of the original investment.
- **Grade 2:** Investments in portfolio companies whose performance is below Advisor’s expectations and which require closer monitoring. However, no loss of investment return (interest and/or dividends) or principal is expected.
- **Grade 3:** Investments in portfolio companies whose performance is below Advisor’s expectations and for which risk has increased materially since origination. Some loss of investment return is expected, but no loss of principal is expected. Companies graded 3 will generally be out of compliance with debt covenants and will be unlikely to make debt repayments on their original schedule.
- **Grade 4:** Investments in portfolio companies whose performance is materially below Advisor’s expectations where business trends have deteriorated and risk factors have increased substantially since the original investment. Investments graded 4 are those for which some loss of principal is expected.

# Notes to the Investor Presentation

1. Income statement data per share excludes the impact of diluted weighted average shares outstanding.
2. Includes PIK interest and dividends earned during the period presented.
3. As adjusted: Amounts are adjusted to remove the incentive management fee expense based on gains, as required by GAAP, and to include only the incremental incentive management fee expense based on Income. Until March 6, 2017, the incremental incentive management fee is calculated based on the current quarter's incremental earnings, and without any reduction for incentive management fees paid during the prior calendar quarters. After March 6, 2017, incentive management fee expense based on income is calculated for each calendar quarter and may be paid on a quarterly basis if certain thresholds are met. Amounts reflect the Company's ongoing operating results and reflect the Company's financial performance over time. The Company's investment advisor had agreed to waive the incentive fee based on income through December 31, 2018, which was extended to June 30, 2019. The Advisor voluntarily waived a portion of its incentive fees based on income from July 1, 2019 through December 31, 2019.  
  
Pre-Incentive Fee: Amounts are adjusted to remove all incentive management fees. Such fees are calculated but not necessarily due and payable at this time.
4. Balance sheet per share data utilizes total shares outstanding at end of period.
5. Net leverage is calculated as the ratio between (A) and (B) at the end of respective periods: (A) debt, excluding unamortized debt issuance costs, less available cash and receivable for investments sold, plus payable for investments purchased and legal settlement payable, if applicable, (B) net asset value.
6. Total investment portfolio excludes cash and cash equivalents.
7. Asset coverage ratio represents the ratio of total assets less non-debt liabilities to total indebtedness.
8. On March 15, 2018, the Company entered into a Third Amendment to the Second Amended and Restated Senior Secured Revolving Credit Facility, which permanently reduced the aggregate amount of multicurrency commitments under the Credit Facility from \$440,000,000 to \$400,000,000. On August 30, 2019, the Company entered into a Fourth Amendment to the Second Amended and Restated Senior Secured Revolving Credit Facility, which permanently reduced the aggregate amount of multicurrency commitments under the Credit Facility from \$400,000,000 to \$340,000,000. The interest rate applicable to Eurocurrency borrowings is generally LIBOR plus an applicable margin of either 1.75% or 2.00% based on a pricing grid using the borrowing base as a multiple of the combined debt amount.
9. Dividend yield as of a date is calculated by annualizing the most recent quarterly dividend announced on this release date as a percentage of the closing stock price on dividend yield date.
10. Distribution Coverage for any period represents the ratio of net investment income, as adjusted, for that period to distributions declared during the same period.
11. Exclusive of amounts due to restructurings, if applicable.
12. The Unsecured Convertible Notes 2022 have a par outstanding amount of \$144 million. For accounting purposes, approximately \$139 million is recognized as carrying value of debt balance (net of unamortized debt issuance cost of approximately \$2 million and unamortized discount of approximately \$2 million).
13. Net Realized / Unrealized Gains (Losses) does not include the change in deferred tax liability for the quarter and year ended 12/31/2018.
14. On January 16, 2018, we announced that BlackRock Advisors, LLC assigned the Management Agreement, dated March 6, 2015, to a wholly-owned subsidiary, BlackRock Capital Investment Advisors, LLC ("BCIA") pursuant to Rule 2a-6 of the 1940 Act. There was no change to fees, nor to the personnel overseeing the provision of investment management services to us.
15. The weighted average yield for borrowings is calculated based on the contractual rate.
16. As of December 31, 2019, the Company uses Global Industry Classification Standard ("GICS") codes to identify industry groupings.

Note: Schedules may differ from public filings due to rounding.

# Corporate Information

# Corporate Information

## Board of Directors\*

### **James E. Keenan**

Chairman of the Board  
Global Head of Fundamental Credit, BlackRock

### **John R. Baron\*\***

Managing Partner of Crystal Ridge Partners, LP

### **Jerrold B. Harris**

Former President and Chief Executive Officer of  
VWR Scientific Products Corporation

### **Mark S. Lies**

Former Global Head of Loan Products and Co-  
Head of Leveraged Finance for Lehman Brothers  
Holdings

### **Meridee A. Moore**

Senior Managing Member of Watershed Asset  
Management, LLC

### **William E. Mayer\*\*\***

Co-founder & Partner at Park Avenue Equity  
Partners, L.P.

### **Maureen K. Usifer\*\*\*\***

Former Chief Financial Officer of Seventh  
Generation Inc.

\*Full bios are available on the website

\*\*Governance Committee Chair

\*\*\*Lead Independent Director

\*\*\*\*Audit Committee Chair

## Corporate Officers

### **James E. Keenan**

Interim Chief Executive Officer

### **Michael Pungello**

Interim Chief Financial Officer and Interim  
Treasurer

### **Laurence D. Paredes**

General Counsel and Corporate Secretary

### **Charles Park**

Chief Compliance Officer

## Senior BlackRock US Private Capital Professionals

### **Nik Singhal**

Investor Relations & Business Strategy  
nik.singhal@blackrock.com  
212.810.5427

## Other Information

### **Independent Registered Public Accounting Firm**

Deloitte & Touche LLP  
New York, NY

### **Exchange**

NASDAQ Global Select Market

### **Listed Security**

BKCC Common Stock

### **Transfer Agent**

BNY Mellon c/o  
Computershare  
P.O. BOX 30170  
College Station, TX 77842-3170

### **Corporate Headquarters**

40 East 52nd Street  
New York, NY 10022

### **Website**

[www.blackrockbkcc.com](http://www.blackrockbkcc.com)