



Capital Southwest Corporation

Investor Presentation

December 2017

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Forward-Looking Statements

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CSWC Senior Management



Bowen S. Diehl

- Joined Capital Southwest in March 2014
- Former Senior Investment Professional at American Capital (2001 – 2014)
- Co-Head of Sponsor Finance Group at American Capital (2007 – 2014)
- 15 years of investing experience in middle market debt and equity
- BE – Vanderbilt University. MBA – UT Austin
- Lives in Dallas with wife and three children



Michael S. Sarnier

- Joined Capital Southwest in June 2015
- Former SVP Treasurer at American Capital (2000 – 2015)
- 20 years of financial, treasury and BDC experience
- BA – James Madison. MBA – George Washington University
- Certified Public Accountant
- Lives in Dallas with wife and three children

CSWC Company Overview

CSWC is a middle-market lending firm focused on supporting the acquisition and growth of middle-market companies across the capital structure

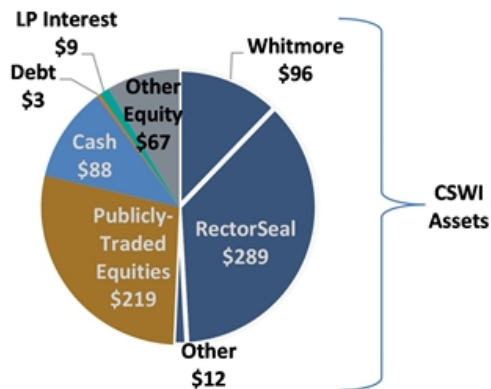
- CSWC was formed in 1961, and became a BDC in 1988
- Publicly-traded on Nasdaq under CSWC ticker
- Internally Managed BDC with RIC status for tax purposes
- 18 employees based in Dallas, Texas
- Relunched CSWC as a middle market lending firm in January 2015
 - ✓ Implemented credit strategy that fits extensive track record of investment team
 - ✓ Liquidated majority of legacy equity assets
 - ✓ Completed tax free spin off of wholly-owned industrial assets in September 2015
- Total Balance Sheet Assets of \$369 MM as of September 30, 2017
- Manage I-45 Senior Loan Fund (“I-45 SLF”) in partnership with Main Street Capital (Nasdaq: MAIN)

Pre-2015 Challenges

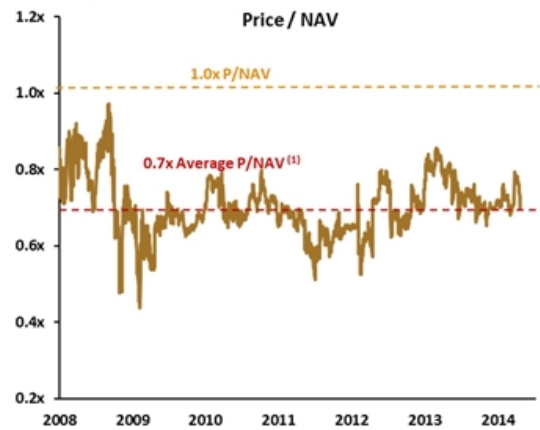
- Until spin off announcement, CSWC traded at a significant discount to NAV
 - ✓ Virtually 100% of CSWC's portfolio was invested in equity
 - ✓ There was significant concentration in two industrial companies, with very large embedded capital gains
 - ✓ Did not pay meaningful dividend

Asset Allocation – 6/30/14

(\$ in millions)



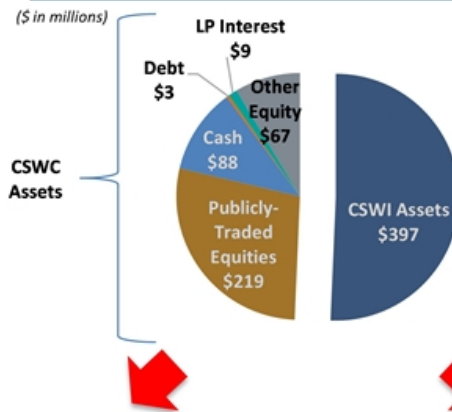
Significant Market Discount to NAV



(1) Average P/NAV from 1/2/08 to 9/30/14

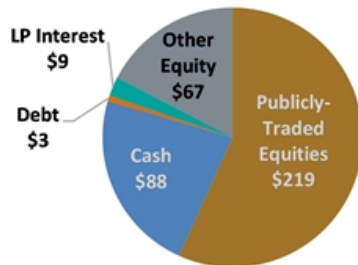
Solution: 2015 Tax Free Spin of Industrial Assets

CSWC Pre-Spinoff - 6/30/14



CSWC Portfolio - 6/30/2014 ⁽¹⁾

(\$ in millions)



CSW Industrials, Inc. ⁽²⁾

NASDAQ Ticker	CSWI
Market Cap	\$749.8 million
Debt	\$53.9 million
Revenue	\$351.2 million
EBITDA	\$60.4 million
EV/EBITDA Multiple	12.8x

(1) 6/30/2014 portfolio mix is pro forma for the spin off of the CSW Industrials companies

(2) Data from CapitalIQ on 12/07/17.

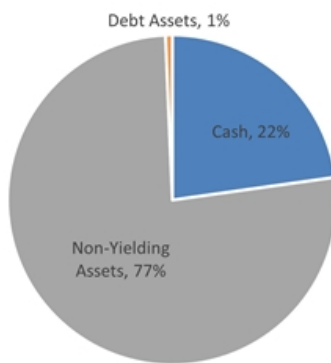
Portfolio Rotation to Income Generation

Since June 2014, CSWC has transformed its investment portfolio increasing income earning assets from 1% of the investable portfolio to 85%

- Exited 22 legacy portfolio equity investments, generating \$228 MM in proceeds
- Invested \$275 MM in 38 middle-market credit investments on balance sheet
- Invested \$353 MM in 77 middle-market credits within I-45 Senior Loan Fund ("I-45 SLF")

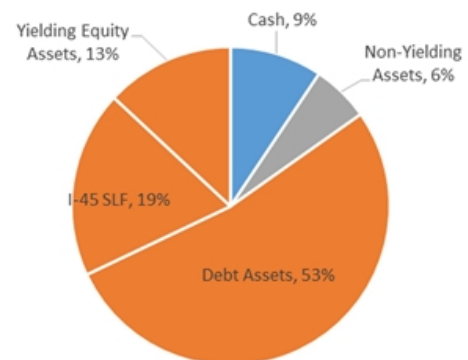
6/30/2014 (excl. CSWI Companies)

1% of Total Assets Generating Recurring Income



9/30/2017 Investable Assets

85% of Total Assets Generating Recurring Income

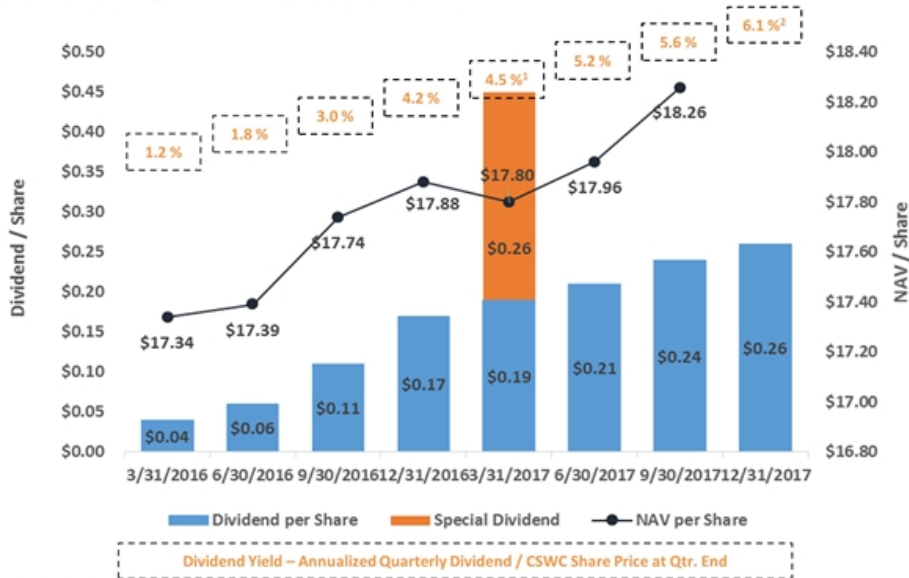


Key Highlights since launch of Credit Strategy

- Built investment and finance teams made up of people with long track records of investing in the middle market
 - ✓ Of the 18 employees, 15 joined CSWC since launching the middle market lending strategy
- Invested \$275 MM in 38 middle-market credit assets on balance sheet
 - ✓ Credit portfolio consists of \$187 MM investments at fair value (73% 1st Lien)
 - ✓ No non-accruals, debt marked at 99% of par
 - ✓ Generated 21% weighted average IRR on 14 exits
- Invested \$353 MM in 77 middle-market credits assets within the I-45 SLF
 - ✓ I-45 portfolio consists of \$224 MM investments at fair value (94% 1st Lien)
 - ✓ No non-accruals, debt marked at 99% of par
 - ✓ Generated 12.5% weighted average IRR on 28 exits

Evolution of CSWC Generating Consistent Dividend and NAV Growth

- Dividend Yield has increased as credit portfolio grows (6.1%² at 12/7/17 vs. 1.2% at 3/31/16)
- NAV growth is key to driving value for all stakeholders (\$18.26 per share at 9/30/17 vs \$17.34 per share at 3/31/16)
- Over the past seven quarters ending 9/30/17, CSWC has generated \$1.11 per share in Pre-Tax NII and paid out \$1.02 per share in regular dividends
 - ✓ Dividend coverage of 109% of Pre-Tax NII



(1) The Special Dividend of \$0.26 is not included in the Dividend Yield calculation.

(2) Based on \$17.09 closing price as of December 7, 2017 and a \$0.26 quarterly dividend declared for the quarter ended 12/31/17.

Two Pronged Investment Strategy

Lower Middle Market (“LMM”): CSWC led or Club Deals

- Companies with EBITDA between \$3 MM and \$15 MM
- Typical leverage of 2x – 4x Debt to EBITDA through CSWC debt
- Commitment size up to \$20 MM with hold sizes generally \$10 to \$15 MM
- Both Sponsored and Non-sponsored deals
- Securities include first lien, unitranche, second lien and subordinated debt
- Frequently make equity co-investments alongside CSWC debt

Upper Middle Market (“UMM”): Syndicated or Club, First and Second Lien

- Companies typically have in excess of \$50 MM in EBITDA
- Typical leverage of 3x – 5.5x Debt to EBITDA through CSWC debt position
- Hold sizes generally \$5 to \$10 MM
- Floating Rate First and Second Lien debt securities
- More liquid assets relative to Lower Middle Market investments
- Provides flexibility to invest/divest opportunistically based on market conditions and liquidity position

Portfolio Statistics by Investment Strategy

Portfolio statistics illustrate CSWC's prudent investment underwriting

Investment Portfolio - Statistics at 9/30/17		
US\$ in 000s	Lower Middle Market ⁽¹⁾	Upper Middle Market
Number of Portfolio Companies	13	13
Total Cost	\$131,762	\$83,283
Total Fair Value	\$170,139	\$84,320
Average Hold Size (at Cost)	\$10,136	\$6,406
% First Lien Investments (at Cost)	63.5%	61.6%
% Second Lien Investments (at Cost)	0.0%	38.4%
% Subordinated Debt Investments (at Cost)	14.3%	0.0%
% Equity (at Cost)	22.2%	0.0%
Wtd. Avg. Yield ⁽²⁾⁽³⁾	11.4%	9.9%
Wtd. Avg. EBITDA of Issuer (\$MM's) ⁽³⁾	\$9.1	\$93.8
Wtd. Avg. Leverage through CSWC Security ⁽³⁾⁽⁴⁾	3.5x	3.7x

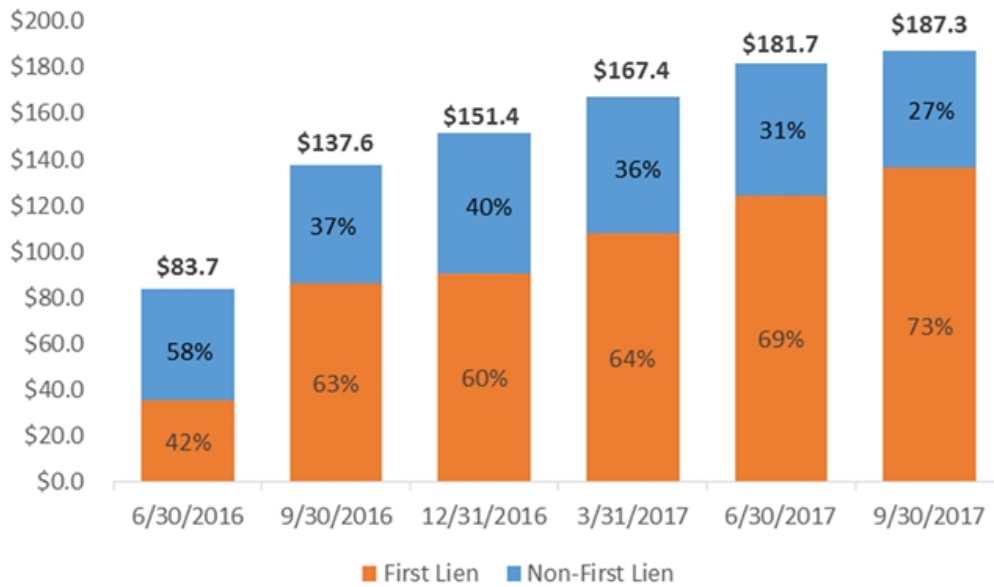
Note: All metrics above exclude the I-45 Senior Loan Fund

1. At September 30, 2017, we had equity ownership in approximately 84.6% of our LMM investments.
2. The weighted-average annual effective yields were computed using the effective interest rates for all debt investments at cost as of September 30, 2017, including accretion of original issue discount but excluding fees payable upon repayment of the debt instruments and any debt investments on non-accrual status. As of September 30, 2017, there were no investments on non-accrual status. Weighted-average annual effective yield is higher than what an investor in shares in our common stock will realize on its investment because it does not reflect our expenses or any sales load paid by an investor.
3. Weighted average metrics are calculated using investment cost basis weighting.
4. Includes CSWC debt investments only. Calculated as the amount of each portfolio company's debt (including CSWC's position and debt senior or pari passu to CSWC's position, but excluding debt subordinated to CSWC's position) in the capital structure divided by each portfolio company's adjusted EBITDA. Management uses this metric as a guide to evaluate relative risk of its position in each portfolio debt investment

Balance Sheet Credit Portfolio Mix

Credit portfolio has grown to \$187 MM and 73% first lien exposure at 9/30/17

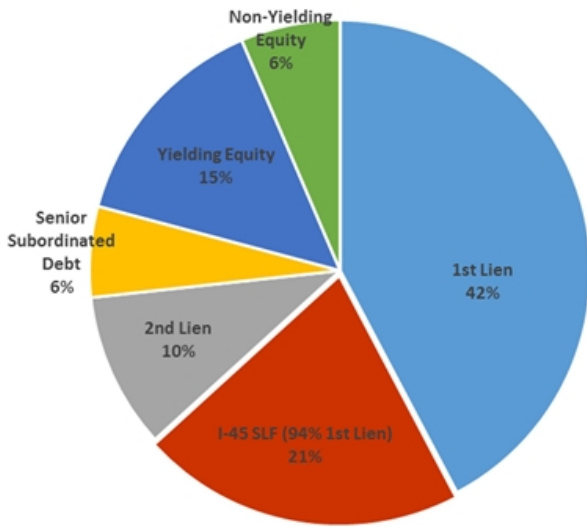
Credit Portfolio (Fair Value)



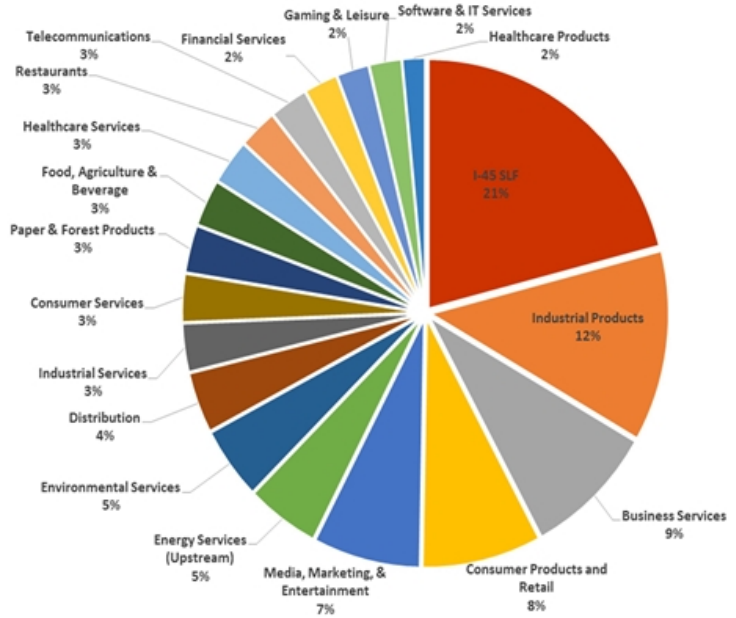
Portfolio Mix as of 9/30/17 at Fair Value

Current Portfolio of \$322 MM continues to be granular, diverse, and focused on income generating securities

Current Investment Portfolio (By Type)



Current Investment Portfolio (By Industry)



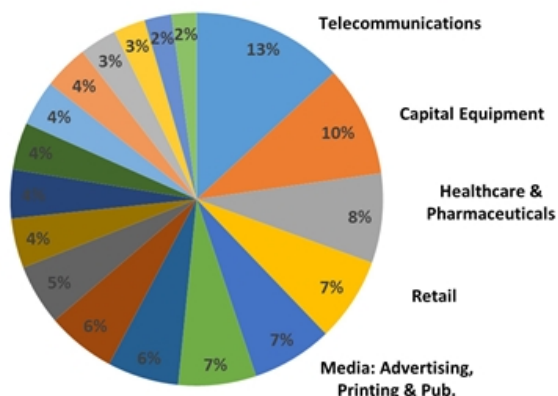
Senior Loan Fund (“I-45”)

- Joint Venture with Main Street Capital Corporation (NASDAQ: MAIN)
- Fund invests in predominately Upper Middle Market first lien loans
- Total target fund size of \$250 MM
 - ✓ Total Equity Commitment of \$85 MM from CSWC (80%) and MAIN (20%)
 - ✓ Total Debt Commitment of \$165 MM through Credit Facility led by Deutsche Bank
- Recurring Run-rate ROE to CSWC of approximately 13.0%, paid quarterly
- CSWC and MAIN jointly control Board of Managers
 - ✓ Capital raising, fund tracking, monitoring, and financial reporting are managed by CSWC
 - ✓ Origination capabilities are a joint effort between CSWC and MAIN
 - ✓ All credit decisions are joint/unanimous between CSWC and MAIN
- I-45 fully disclosed in CSWC financials, but “off-balance sheet” for purposes of 1:1 BDC Leverage Test

I-45 Portfolio Remains Granular and Diverse

\$224 MM in Portfolio Assets generate attractive risk adjusted returns

Current I-45 Portfolio (By Industry)



I-45 Portfolio Statistics				
	<u>12/31/2016</u>	<u>3/31/2017</u>	<u>6/30/2017</u>	<u>9/30/2017</u>
Total Debt Investments at Fair Value	\$186,643	\$200,243	\$209,863	\$223,807
Number of Issuers	41	43	46	46
Wtd. Avg. Issuer EBITDA	\$88,970	\$81,417	\$80,909	\$79,009
Avg. Investment Size as a % of Portfolio	2.4%	2.3%	2.2%	2.2%
Wtd. Avg. Net Leverage on Investments ⁽¹⁾	3.2x	3.0x	3.5x	3.5x
Wtd. Avg. Yield	8.0%	7.9%	7.9%	7.7%
Wtd. Avg. Duration (Yrs)	4.4	4.3	4.9	4.8

¹ Through I-45 Security

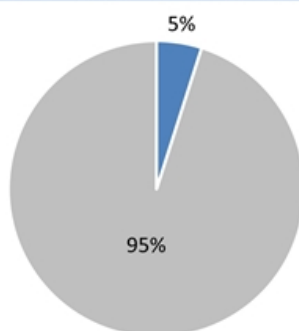
CSWC Capitalization

- \$180 MM Credit Facility: led by ING (eight banks)
 - ✓ Includes accordion up to \$250 MM
 - ✓ \$56 MM drawn as of 9/30/2017
 - ✓ Matures November 2021; L + 300 with step-down to L + 275
- Balance Sheet Cash: Approximately \$33 MM of cash and cash equivalents as of 9/30/2017
- Regulatory Leverage (Debt/Equity): 0.2x to 1.0x
 - ✓ Well below the 1:1 regulatory limitation
- \$165 MM I-45 Credit Facility: led by DB (four banks)
 - ✓ \$139 MM drawn as of 9/30/17
 - ✓ Matures July 2022; L + 240

Interest Rate Sensitivity

Debt Portfolio Exposure at 9/30/17 Well-Positioned for Changes to Base Interest Rates

Fixed vs. Floating Portfolio Composition ⁽¹⁾



■ Fixed ■ Floating

Change in Base Interest Rates	Illustrative NII Change (\$'s)	Illustrative NII Change (Per Share)
(50bps)	(\$311,322)	(\$0.02)
50 bps	\$901,016	\$0.06
100bps	\$1,802,031	\$0.11
150bps	\$2,703,047	\$0.17
200bps	\$3,604,063	\$0.22

(1) Portfolio Composition includes I-45 assets pro rata as a % of CSWC's equity investment in the fund

Note: Illustrative change in NII is based on CSWC's existing debt investments as of 9/30/17, adjusted only for changes in Base Rates. The results of this analysis include the I-45 Senior Loan Fund, which is comprised of 100% floating rate assets and liabilities.

Advantages of the Internally Managed BDC Structure

- Management interests are directly aligned with all Stakeholders
 - ✓ Both the asset manager and the managed investment assets are consolidated and therefore all stakeholders have an interest in both entities
 - ✓ Management owns equity directly in the BDC
 - ✓ All management activities flow to the benefit of all stakeholders
- Operating expenses of an internally managed BDC typically offer a lower fee structure than an externally managed BDC (Opex as a % of Assets)
 - ✓ Average of 2.2% for Internally Managed BDCs vs. 3.6% for similarly sized Externally Managed BDCs
- CSWC continues to thoughtfully manage its expense structure to offer a lower fee structure (Opex as a % of Assets)
 - ✓ Senior personnel and corporate infrastructure already in place
- Historically, performing Internally Managed BDCs have traded at 0.5x price to book premiums versus Externally Managed peers

Appendix A: Investment and Finance Teams

Investment Team with Strong Credit Experience

- CSWC has assembled an investment team made up of individuals with extensive track records in middle market lending

Name	Title	Years Experience	Year Joined CSWC	Relevant Experience
Bowen Diehl	Chief Executive Officer / CIO	22	2014	<ul style="list-style-type: none"> - Managing Director and Co-Head of Sponsor Finance at American Capital - Merrill Lynch Investment Banking - Chase Securities Investment Banking
Douglas Kelley	Managing Director	20	2015	<ul style="list-style-type: none"> - Managing Director of Sponsor Finance at American Capital - Investment banking at J.P. Morgan, The Beacon Group, Credit Suisse First Boston
Josh Weinstein	Managing Director	17	2015	<ul style="list-style-type: none"> - Principal at H.I.G. WhiteHorse - VP at WhiteHorse Capital Partners - Analyst at Morgan Stanley and Citigroup
Bill Ashbaugh	Managing Director Business Development	40	2001	<ul style="list-style-type: none"> - Managing Director in Corporate Finance at Hoak, Principal and Southwest Securities - VP of Corporate Finance at Rauscher Pierce Refsnes (now RBC Dain Rauscher)
Curtis Harrison	Principal	14	2017	<ul style="list-style-type: none"> - VP at Goldman Sachs Specialty Lending Group (GSSSLG) - MD at Kelly & Cornell, LLC
Ryan Kelly	Vice President	10	2010	<ul style="list-style-type: none"> - Analyst at Houlihan Lokey
Matt Darrah	Vice President	14	2016	<ul style="list-style-type: none"> - CFO of Rocket Learning - PM at Perot Investments (family office credit strategy) - Associate at American Capital - Analyst at Citigroup and Challenger Capital
Rachael Bazan	Associate	4	2016	<ul style="list-style-type: none"> - Analyst at ING
Spencer Klein	Associate	4	2015	<ul style="list-style-type: none"> - Analyst at J.P. Morgan
Michael Knapp	Associate	5	2015	<ul style="list-style-type: none"> - Analyst at Jefferies

Appendix B: Underwriting & Portfolio Management

Disciplined Investment Process: Investment Criteria

Experienced Management Team with Meaningful Equity Ownership	<ul style="list-style-type: none">• Relevant experience and track record of success• Significant economic interest in the future success of the company
Sustainable Business Model	<ul style="list-style-type: none">• Differentiated product and/or service that gives company a sustainable reason to exist• Leverageable cash flow with ability to maintain or grow margins
Strong Competitive Position	<ul style="list-style-type: none">• Market leader in its business segments• Quantifiable competitive advantage versus their competitors with barriers to entry
Diversification of Customers and Suppliers	<ul style="list-style-type: none">• Inability for any one customer to significantly affect the company's financial performance and ability to service debt• Sustainability of supply and cost of inputs
Ability of Capital Structure to Sustain Economic Cycles	<ul style="list-style-type: none">• Capital structure appropriate for business model and industry• Downside scenario modeling proves ability to sustain economic cycles while servicing debt with leverage inside enterprise value
Significant Equity Value Supporting Debt	<ul style="list-style-type: none">• Significant underlying equity value to support debt in capital structure

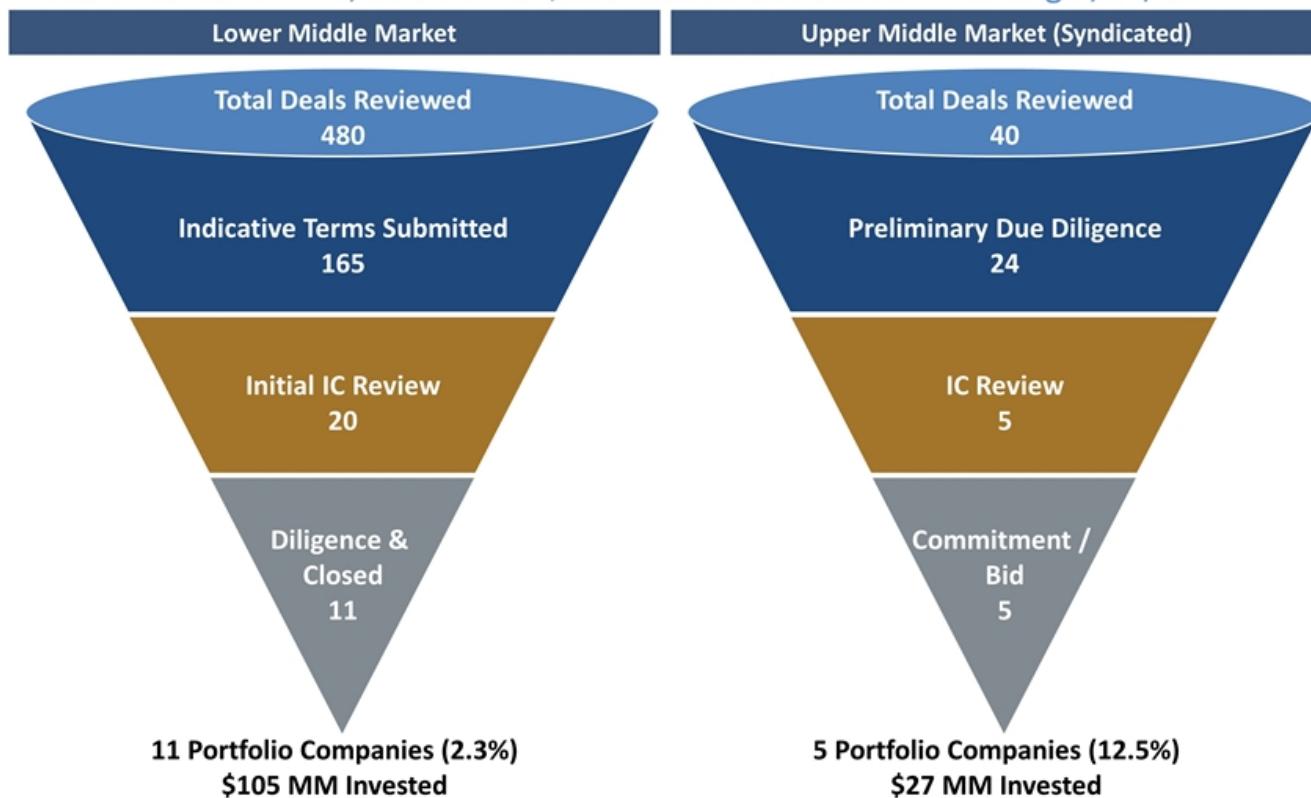
Disciplined Process: Focus on Capital Preservation



Consistent, Downside-Focused, Risk-Return Centric Credit Approach

Maintaining Investment Discipline as Pipeline Grows

520 Deals Reviewed, 16 deals or \$132 million closed in LTM ending 9/30/17



CSWC Taps Into a Broad Network of Deal Sources

Private Equity



Intermediaries and Lending Partners



Valuation Process Overview

- 3rd Party Valuation Consultants are an integral part of our valuation process
- Our 3rd Party Valuation Consultants value our portfolio based on the following guidelines:
 - All Lower Middle Market investments are valued at least 2x per year
 - Underperforming investments are generally valued 4x per year



Appendix C: Financial Statements

Balance Sheet

<i>(In Thousands, except per share amounts)</i>	Quarter Ended 12/31/2016	Quarter Ended 3/31/2017	Quarter Ended 6/30/2017	Quarter Ended 9/30/2017
Assets				
Portfolio Investments	\$267,131	\$286,880	\$306,582	\$321,860
Cash & Cash Equivalents	\$32,671	\$22,386	\$12,359	\$33,329
Deferred Tax Asset	\$1,940	\$2,017	\$1,858	\$1,846
Other Assets	\$10,592	\$14,469	\$10,391	\$11,635
Total Assets	\$312,334	\$325,752	\$331,190	\$368,670
Liabilities				
Credit Facility	\$15,000	\$25,000	\$25,000	\$56,000
Payable for Unsettled Transaction	\$0	\$0	\$9,263	\$0
Other Liabilities	\$11,890	\$15,680	\$9,500	\$20,156
Total Liabilities	\$26,890	\$40,680	\$43,763	\$76,156
Shareholders Equity				
Net Asset Value	\$285,444	\$285,072	\$287,427	\$292,514
NAV per Share	\$17.88	\$17.80	\$17.96	\$18.26
Debt to Equity	0.1x	0.1x	0.1x	0.2x
Shares Outstanding at Period End	15,965	16,011	16,006	16,019

Income Statement

<i>(In Thousands, except per share amounts)</i>	Quarter Ended 12/31/16	Quarter Ended 3/31/17	Quarter Ended 6/30/17	Quarter Ended 9/30/17
Investment Income				
Interest Income	\$3,611	\$4,113	\$4,520	\$5,282
Dividend Income	\$3,078	\$3,002	\$3,004	\$3,088
Fees and Other Income	\$176	\$611	\$200	\$139
Total Investment Income	\$6,865	\$7,726	\$7,724	\$8,509
Expenses				
Cash Compensation	\$1,476	\$1,704	\$1,638	\$1,606
Share Based Compensation	\$321	\$382	\$368	\$384
General & Administrative	\$1,144	\$1,360	\$1,228	\$1,364
Spin-off Related Expenses	\$172	\$172	\$172	\$173
Total Expenses (excluding Interest)	\$3,113	\$3,618	\$3,406	\$3,527
Interest Expense	\$343	\$543	\$738	\$911
Pre-Tax Net Investment Income	\$3,409	\$3,565	\$3,580	\$4,071
Taxes and Gain / (Loss)				
Income Tax Benefit (Expense)	(\$536)	(\$284)	(\$144)	(\$134)
Net realized gain (loss) on investments	\$72	\$4,098	\$624	\$210
Net increase (decrease) in unrealized appreciation of investments	\$4,940	(\$1,402)	\$1,384	\$4,496
Net increase (decrease) in net assets resulting from operations	\$7,885	\$5,977	\$5,444	\$8,643
Weighted Average Diluted Shares Outstanding	15,932	16,044	16,072	16,078
Pre-Tax Net Investment Income Per Dil. Weighted Average Share	\$0.21	\$0.22	\$0.22	\$0.25
Quarterly Dividends per Share	\$0.17	\$0.19	\$0.21	\$0.24

Portfolio Statistics

Continuing to build a well performing credit portfolio with no non-accruals

	Quarter Ended 12/31/2016	Quarter Ended 3/31/2017	Quarter Ended 6/30/2017	Quarter Ended 9/30/2017
Portfolio Statistics				
Fair Value of Debt Investments	\$151,465	\$167,447	\$181,725	\$187,316
Average Debt Investment Hold Size	\$5,826	\$5,980	\$6,490	\$6,938
Fair Value of Debt Investments as a % of Par	98%	99%	99%	99%
% of Debt Portfolio on Non-Accrual (at Fair Value)	0.0%	0.0%	0.0%	0.0%
Weighted Average Investment Rating ⁽¹⁾	1.9	1.9	2.0	2.0
Weighted Average Yield on Debt Investments	10.3%	10.3%	10.5%	10.7%
Total Fair Value of Portfolio Investments	\$267,131	\$286,880	\$306,582	\$321,860
Weighted Average Yield on all Portfolio Investments ⁽²⁾	10.7%	10.5%	10.4%	10.7%
Investment Mix (Debt vs. Equity) ^{(3) (4)}	73% / 27%	75% / 25%	76% / 24%	74% / 26%
Investment Mix (Yielding vs. Non-Yielding) ⁽⁴⁾	94% / 6%	95% / 5%	95% / 5%	94% / 6%

(1) CSWC utilizes an internal 1 - 4 investment rating system in which 1 represents material outperformance and 4 represents material underperformance. All new investments are initially set to 2.

(2) Includes dividends from Media Recovery, Inc. and I-45 Senior Loan Fund.

(3) Excludes CSWC equity investment in I-45 Senior Loan Fund.

(4) At Fair Value

Investment Income Detail

Constructing a portfolio of investments with recurring cash yield

- Recurring cash interest income continues to grow quarter over quarter
- Earned less non-recurring prepayment fees in Q2 2018 versus previous quarter
- PIK income remains a minor portion of NII

<i>(In Thousands)</i>	Quarter Ended 12/31/16	Quarter Ended 3/31/17	Quarter Ended 6/30/17	Quarter Ended 9/30/17
Investment Income Breakdown				
Cash Interest	\$3,490	\$3,913	\$4,264	\$5,082
Cash Dividends	\$3,078	\$3,002	\$3,004	\$3,018
PIK Income	\$0	\$63	\$73	\$70
Amortization of purchase discounts and fees	\$120	\$136	\$183	\$200
Management/Admin Fees	\$105	\$115	\$128	\$139
Prepayment Fees & Other Income	\$73	\$497	\$72	\$0
Total Investment Income	\$6,865	\$7,726	\$7,724	\$8,509
Key Metrics				
Cash Income as a % of Investment Income	98%	97%	97%	97%
% of Total Investment Income that is Recurring ⁽¹⁾	90%	90%	93%	97%

(1) Non-Recurring income principally made up of acceleration of unamortized OID and prepayment fees

Corporate Information

Board of Directors
Inside Directors Bowen S. Diehl
Independent Directors David R. Brooks Jack D. Furst T. Duane Morgan William R. Thomas John H. Wilson

Corporate Offices & Website
5400 LBJ Freeway 13th Floor Dallas, TX 75240 http://www.capitalsouthwest.com

Senior Management
Bowen S. Diehl <i>President & Chief Executive Officer</i>
Michael S. Sarner <i>Chief Financial Officer, Secretary & Treasurer</i>

Investor Relations
Michael S. Sarner Capital Southwest 214-884-3829 msarner@capitalsouthwest.com

Securities Listing
NASDAQ: CSWC

Fiscal Year End
March 31

Independent Auditor
RSM US Chicago, IL

Corporate Counsel
Jones Day / Eversheds Sutherland

Transfer Agent
American Stock Transfer & Trust Company, LLC 800-937-5449 www.amstock.com

Industry Analyst Coverage		
Firm	Analyst	Contact Information
Robert W. Baird & Co.	Bryce Rowe, CFA	Direct: 804-447-8019
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