

5 Steps™

to Create a
Positive Impact



In partnership with **Schroders**

1

Which impact
do I want to achieve?



Social

- Financial inclusion
- Women empowerment
- Affordable housing
- Job creation
- Health
- Education



Environmental

- Climate change adaption
- Energy efficiency
- Renewable energy
- Sustainable infrastructure
- Green buildings
- Sustainable agriculture

Examples, not a final and exhaustive list

2

What liquidity and risk
profile am I looking for?



Liquid

- Listed equity
- Fixed income/
listed debt



Semi-liquid

- Private debt



Illiquid

- Real estate
- Sustainable
infrastructure
- Private
equity

■ Risk/return □ Correlation with other asset classes

3

What is my
geographical focus?



Global



Regional



Developed



Developing

4

What is the adequate
impact investing vehicle?



Direct investment



Impact fund



Fund of funds



Blended finance



Passively managed product

5

How do I measure
the intended impact?



Investment intent



Impact KPIs



End beneficiaries



Contribution



Unintended side-effects