

# **MONEY** & BUSINESS PARTNERSHIP

## **THE FUTURE OF IMPACT PERFORMANCE: REDEFINING ROI IN 5 YEARS**



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Founder & CEO of AURA

in collaboration with the Intergen.Family



# THE REALITY

**“The investment decision we make today will have a profound, lasting impact on our economy, our environment, and our quality of life for generations to come.”**

- Micheal W. Frerichs, Illinois State Treasurer



VISION

# WHAT IS IMPACT INVESTING?

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**Impact:** The longer-term, deeper change resulting from outcomes.

**Investment:** The action or process of investing money for profit.

**Impact investments** are investments made with the intention to generate positive, measurable social and environmental impact alongside a financial return. Impact investments can be made in both emerging and developed markets, and target a range of returns from below market to market rate, depending on investors' strategic goals.

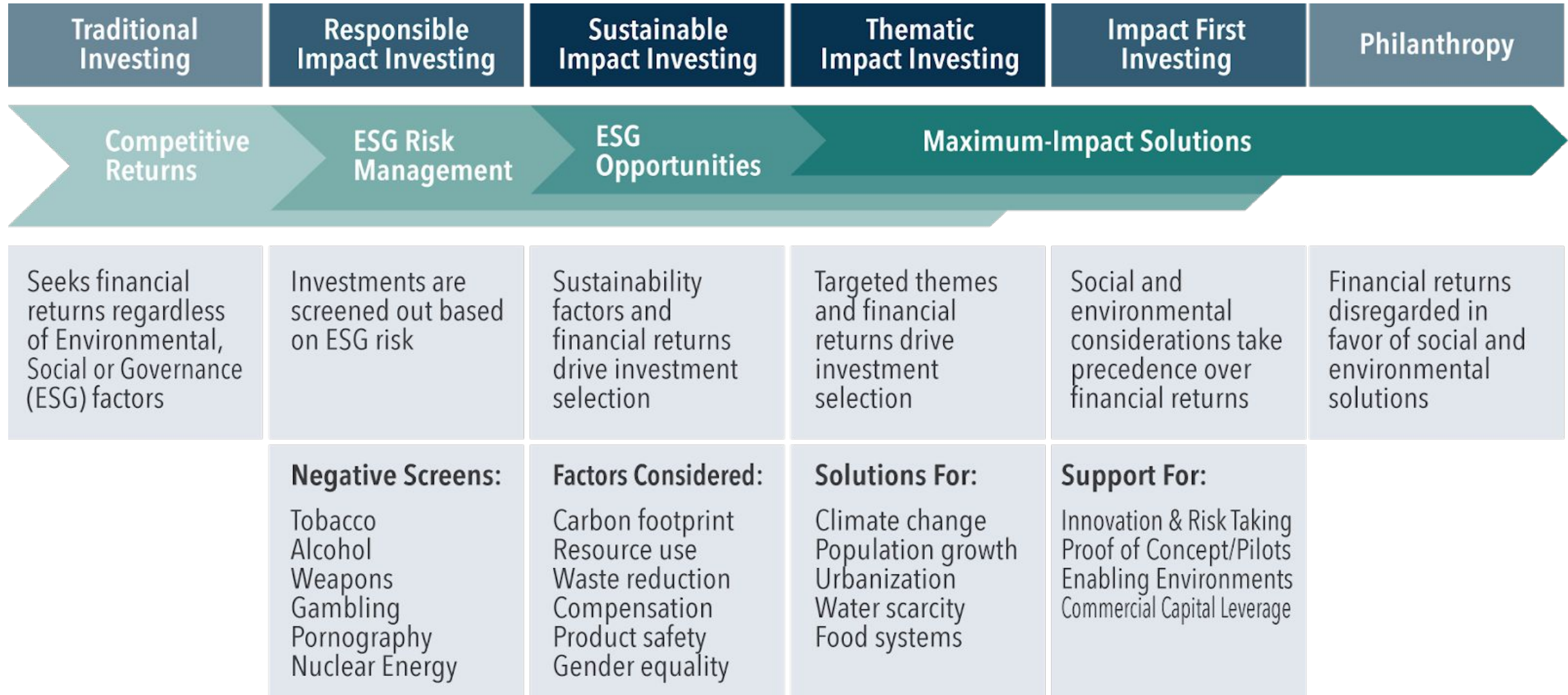
[https://impactinvestingaustralia.com/glossary/investment\\_meaning](https://impactinvestingaustralia.com/glossary/investment_meaning)

<https://theqiin.org/impact-investing/need-to-know/>

# THE UNITED NATIONS SUSTAINABLE DEVELOPMENT GOALS



# IMPACT INVESTMENT SPECTRUM



# WHY IS IMPACT INVESTING IMPORTANT?

Impact investing doesn't mean that it is better than traditional investment; however, according to Harvard College Impact Investing Group, it complements it with enhanced insights and additional information to enable asset owners or fiduciaries to make better decisions.

**We are needing to take BETTER decisions in order to:**

- **Meet global challenges**
- **Achieve market-rate returns**
- **Stabilize your portfolio**
- **Put your capital to work**
- **Align values with investments**
- **Meet client demand**
- **Connect with big thinkers**
- **Change the culture of investing**
- **Be a global citizen**
- **Heal the world**

**“A Morgan Stanley study finds that social impact funds on average had lower volatility than comparable non-impact funds.”**

SOURCE

**88% REPORTED  
MEETING OR EXCEEDING  
THEIR FINANCIAL  
EXPECTATIONS, WHILE  
99% REPORTED  
MEETING OR EXCEEDING  
THEIR IMPACT  
EXPECTATIONS.**

SOURCE

**ACCORDING TO THE GIIN  
ANNUAL IMPACT INVESTOR  
SURVEY, IMPACT INVESTMENTS  
ARE MEETING OR EXCEEDING  
INVESTOR EXPECTATIONS.**



# FIVE DIMENSIONS OF IMPACT

**“EVERYTHING WE DO IMPACTS PEOPLE AND THE PLANET. TO UNDERSTAND ANY IMPACT, WE NEED TO UNDERSTAND FIVE DIMENSIONS OF PERFORMANCE.”**

SOURCE, IMPACT MANAGEMENT PROJECT

# INDUSTRY LEADERS GUIDE THE WAY: GLOBAL IMPACT INVESTING NETWORK (GIIN)

Source: <https://thegiin.org/research/publication/imm-survey-second-edition> January 2020 Global Impact Investing Network



# INDUSTRY LEADERS GUIDE THE WAY: IRIS+

IRIS+ is the generally accepted system for measuring, managing, and optimizing impact.



Create an account to get started

Get Started

Join the over 23,000 users who have registered to use IRIS+ materials.

Source: <https://iris.thegiin.org/>



# INDUSTRY LEADERS GUIDE THE WAY: SOPACT

**Impact  
Measurement &  
Management  
DONE RIGHT.  
-SOPACT**

Source: <https://www.sopact.com/impact-management>



About the Fourth Sector

Growing the Sector

Programming

About the Group

DONATE



# INDUSTRY LEADERS GUIDE THE WAY: THE FOURTH SECTOR GROUP

Source: <https://www.fourthsector.org/opportunities>

# CONSCIOUS CAPITALISM IS CATALYST FOR CHANGE

Impact investing offers investable solutions to addressing today's global challenges, and seeks to add value to society.

For the impact investor, value creation for society and financial return are equally important.

84% of investors say they're interested in impact investing, or putting their money behind companies that make a positive difference in the world.

By making impact investing the new normal, we can spur systemic change in the global financial markets.


**Because how we invest defines the world we want to live in.**

<https://www.upthereeverywhere.com/blog/coronavirus-a-big-wake-up-call-and-why-the-world-needs-to-change-the-way-it-works>

<https://www.morganstanley.com/access/impact-investing-why-it-matters>

<https://www.triodos-im.com/knowledge-centre/why-is-impact-investing-important>

**84% OF  
INVESTORS SAY  
THEY'RE INTERESTED  
IN IMPACT INVESTING**



**“ By focusing on teaching businesses about the ROI they can achieve by preserving and investing in nature, you’re expanding the scope of the impact you can have.”**

- Ramez Naam

INTERGEN.FAMILY

**ALIGN WITH US**

**hello@intergen.family**



## RESOURCES

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<https://impactinvestingaustralia.com/glossary/investment-meaning>

<https://thegiin.org/impact-investing/need-to-know/>

*Image Note: Use SDG iconography:*

<https://www.shutterstock.com/image-illustration/3d-rendered-illustration-united-nations-sustainable-1516953236>

<https://www.forbes.com/sites/forbesfinancecouncil/2017/04/13/10-reasons-why-you-should-consider-impact-investing/?sh=35cf7a07a115>

<https://www.pionline.com/esg/global-impact-investment-market-going-strong-despite-pandemic-giin>

<https://impactmanagementproject.com/impact-management/impact-management-norms/>

<https://thegiin.org/research/publication/imm-survey-second-edition>

January 2020 Global Impact Investing Network

<https://iris.thegiin.org/>

<https://www.sopact.com/impact-management>

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