

Social investments made by investors into charities and social enterprises

INVESTMENTS MADE
at 31st Dec 2018 - totalling **£15.2m**



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Of the **239** investments made into charities and social enterprises by the social investors to date...

£64k
Average investment

47 months
Average loan term

5 FTE
Median investee employees

7.37%
Average interest rate

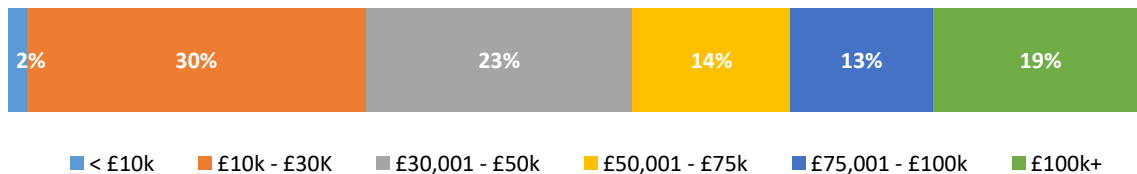
£234k
Median turnover of recipients

55%
Loan recipients also received a Growth Fund grant

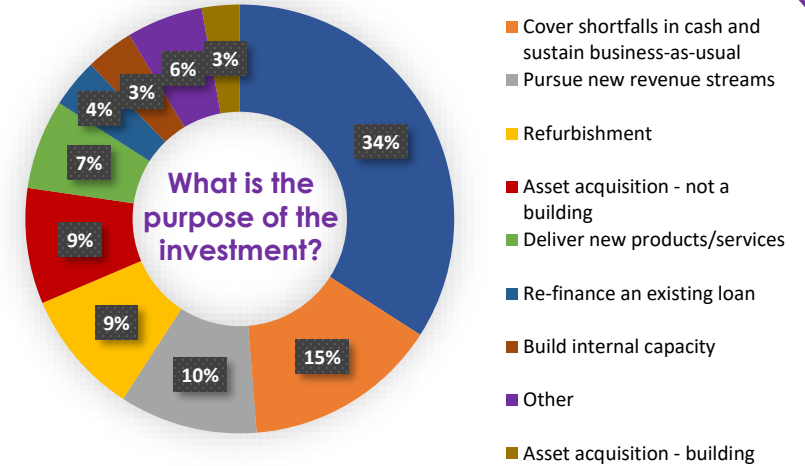
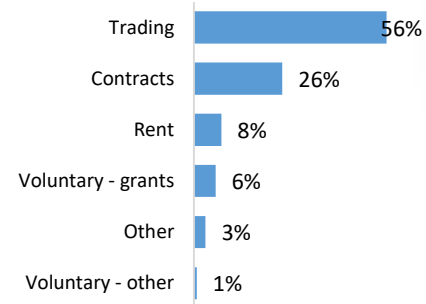
26%
Borrowers that received Reach Fund or other capacity building support

12%
Of total investment given as grant

What is the spread of the investment size?

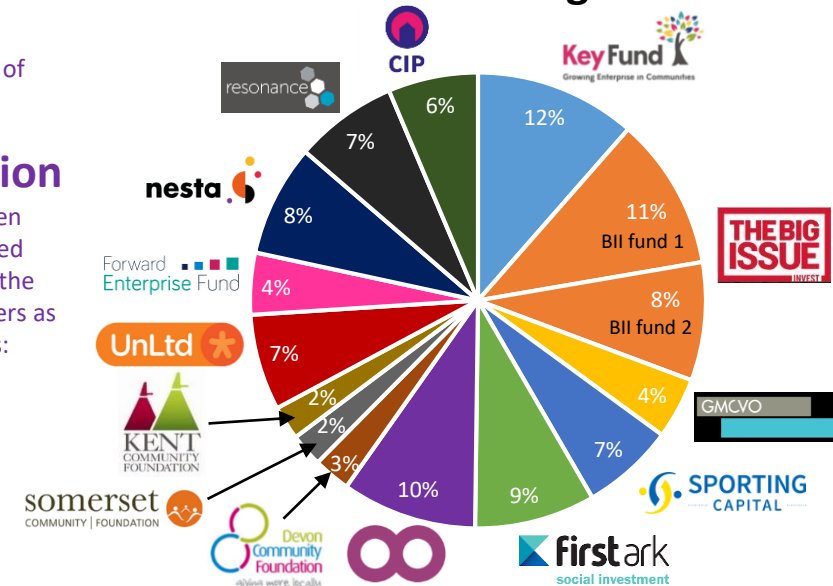


What is the primary source of income of investees?



The social investors delivering the Growth Fund

A total of **£47 million** has been allocated across the providers as follows:




With one additional fund approved and set to launch in early 2019.

Quarterly Dashboard to 31 Dec 2018: CAPACITY BUILDING

REACH

Investment readiness grants for charities & social enterprises via social investor 'Access Points'

252 Grants awarded to date	£3.48m Grants awarded to date
29 Grants awarded this quarter	£359k Grants awarded this quarter
25 Social investor 'Access Points'	£13.9k Average Grant size




[CLICK HERE to view interactive map](#)

For more information see reachfund.org.uk

Enterprise Development Programme

Helping charities and social enterprises transition to new enterprise models or grow existing ones.

21 Feasibility Grants awarded to date 7 Homeless 14 Youth	6 Development Grants awarded to date 3 Homeless 3 Youth
£8.3k Average feasibility grant size	£31.1k Average development grant size
40 Enterprise Learning places awarded 20 Homeless 20 Youth	



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For more information see sibgroup.org.uk/enterprise-development-programme


Connect Fund | Building a better social investment market

£2.05m has been awarded so far

1 investment & **46** grants have been made across eight themes



Skill Development 8 grants	Market Information 3 grants
Diversity 8 grants	Standards 1 grant
Data Sharing 2 grants	Capacity Building 13 grants
Networks 9 grants	Business Development 2 grants & 1 investment



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Strengthening the social investment market to better meet the needs of VCSEs - <http://www.connectfund.org.uk>

OUR ENDOWMENT

Invested under our 'total impact' approach whilst being spent down to fund these programmes

46.7%	[Tier 1] Charities and social enterprises delivering social impact in the UK
0.3%	[Tier 2] Charities and social enterprises delivering social impact elsewhere
17.8%	[Tier 3] Other organisations delivering social impact
34.1%	[Tier 4] Other organisations that have best in class ESG indicators (priority on S&G)
1.1%	Cash Read more about our total impact investment approach here

Portfolio investments at 31st Dec 2018