

## Social investments made by investors into charities and social enterprises

### INVESTMENTS MADE at 31<sup>st</sup> Mar 2019 - totalling **£19m**

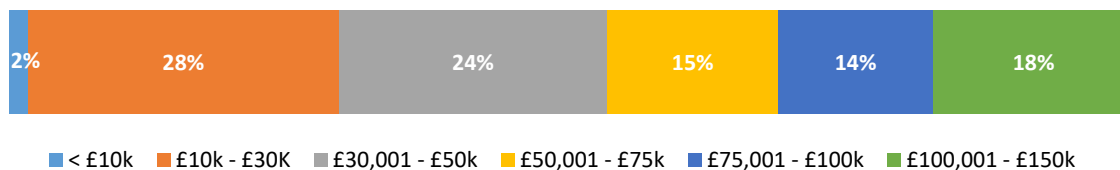


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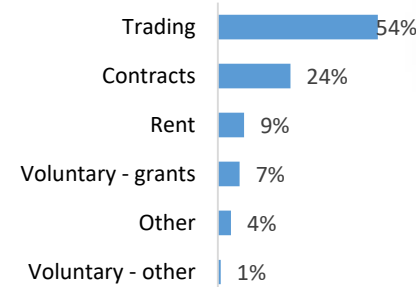
Of the **297** investments made into charities and social enterprises by the social investors to date...

- £64k** Average investment
- 48 months** Average loan term
- 5 FTE** Median investee employees
- 7.33%** Average interest rate
- £232k** Median turnover of recipients
- 54%** Loan recipients also received a Growth Fund grant
- 26%** Borrowers that received Reach Fund or other capacity building support
- 13%** Of total investment given as grant

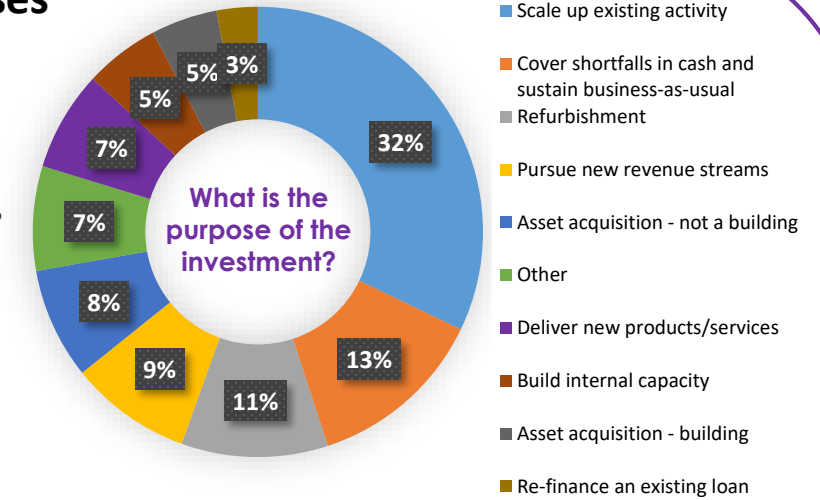
### What is the spread of the investment size?



### What is the primary source of income of investees?

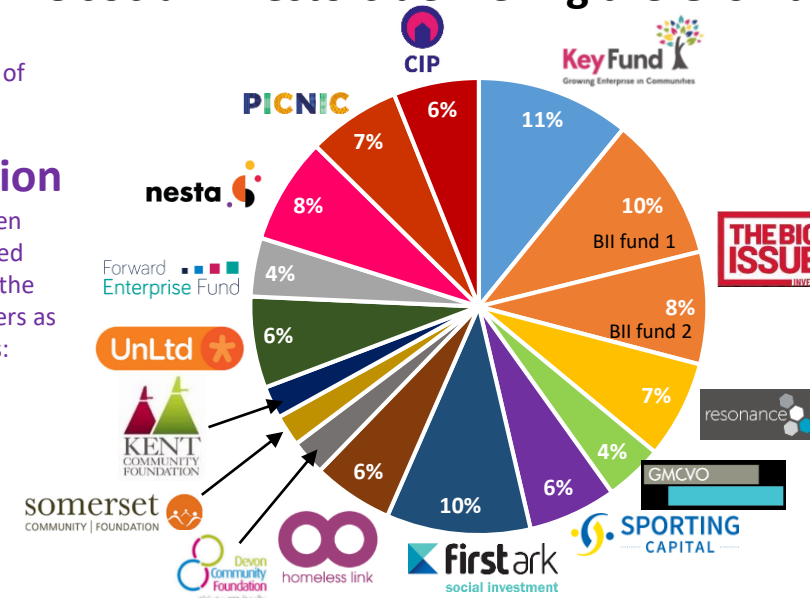


### What is the purpose of the investment?



## 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 Mar 2019: CAPACITY BUILDING

## REACH

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

<b>290</b> Grants awarded to date	<b>£4.07m</b> Grants awarded to date
<b>39</b> Grants awarded this quarter	<b>£593k</b> Grants awarded this quarter
<b>29</b> Social investor 'Access Points'	<b>£14.04k</b> Average Grant size




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For more information see [reachfund.org.uk](http://reachfund.org.uk)

## Enterprise Development Programme

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

<b>54</b> Feasibility Grants awarded to date	<b>19</b> Development Grants awarded to date
<b>19 Homeless 35 Youth</b>	<b>7 Homeless 12 Youth</b>
<b>£7.6k</b> Average feasibility grant size	<b>£29.2k</b> Average development grant size
<b>40</b> Enterprise Learning places awarded	
<b>20 Homeless 20 Youth</b>	



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For more information see [sibgroup.org.uk/enterprise-development-programme](http://sibgroup.org.uk/enterprise-development-programme)

## Connect Fund | Building a better social investment market

Themes

Capacity Building 13	Data Sharing 2	Diversity 8	Networks 9
Business development 5	Skill development 10	Standards & Templates 1	Market Information 3

**£2.1m** has been awarded so far

**1** investment & **50** grants have been made across eight themes



The Connect Fund hosted **'The Gathering'** where various delegates in the social investment market were brought together in March

Over **160+** people attended the two-day conference



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

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## OUR ENDOWMENT

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

<b>46.8%</b>	<b>[Tier 1]</b> Charities and social enterprises delivering social impact in the UK
<b>0.3%</b>	<b>[Tier 2]</b> Charities and social enterprises delivering social impact elsewhere
<b>18.2%</b>	<b>[Tier 3]</b> Other organisations delivering social impact
<b>34.2%</b>	<b>[Tier 4]</b> Other organisations that have best in class ESG indicators (priority on S&G)
<b>0.56%</b>	Cash

Read more about our total impact investment approach [here](#)

Portfolio investments at 31<sup>st</sup> March 2019