



OikosInvest, Partner of FaithInvest Potential Investment Partner of FI Members

Pragmatic Faith-Consistent Investing
FaithInvest Inaugural Member's Conference, 8-9 June 2021, online

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www.oikosinvest.org



1. Structure of OikosInvest (OF)

- Founded in Sept 2020 as Foundation under Swiss Law
- Based in Geneva in the Ecumenical Center
- Board of Foundation with 4 members (will be soon enlarged):
 - Christoph Stückelberger, Prof. of Ethics, President, Switzerland/Geneva
 - Anis Asghar, international entrepreneur, UK/London
 - Bright Mawudor, Deputy General Secretary of All Africa Conference of Churches and Prof of Finance, Kenya/Nairobi
 - Joy Cadangen, International Accountant, Philippines/Switzerland, Geneva
- Staff: 3 leading persons hired, will start in Q3 in OF Offices in Geneva. Office in Nairobi to be opened in Q3/4 2021
- Capital: substantial Endowment Fund as Capital of OF.
- Website: www.oikosinvest.org (under construction, only landing page)



2. Vision/Objectives of OikosInvest (OF)

Vision

People live in a sustainable world where they can implement their right to food, water, healthcare, education, protection and shelter, equality and prosperity. The foundation supports faith-based and values-driven organisations, who actively support this vision, in an attitude of ecumenical and interfaith openness and cooperation.

Objectives

The objectives of the Foundation are

- to promote ethical and sustainable investments in projects, especially
 - The support of projects of faith-based and values-driven partners;
 - The support of projects in agriculture/food/water, health, education, environment and financial institutions;
 - The support of projects in other sectors as needed;
 - The support of projects in Africa and Asia and on all continents possible;
 - The promotion of ethical scientific research;
 - The promotion of ethics in economy, finance and investments;
 - The promotion of innovative technologies for these objectives;
 - The production and sales of goods and services deriving from above;
- to guarantee the efficiency, quality and values-implementation of the projects.



3. Funding and Projects of OikosInvest (OF)

- Investments in medium size projects, typically 1-10 Mio Euro
- Investments by Equity and Loans
- Risk: Willingness to invest in risky projects and areas, but of course linked to careful and strong due diligence, especially on project management
- OF got already over 30 applications, mainly from Africa, since May 2020 until now (example on next two slides)
- Plan is to invest only own substantial endowment capital of OF. Co-investors not excluded, but rather in second step.
- Delay in processing the applications as endowment capital is expected now only in July 2021 (originally expected beginning of 2021)

Project Example

Juice making

Agriculture

Uganda

	Page 1	Answers
1	Industry	Agriculture
2	Company/ Institution background (incl. e.g. religious affiliation), nature of business	The XX Church of Uganda in partnership with the XX Agro-Industries which were founded in 2020 and specializes in processing, packaging and marketing of agriculture produce.
5	Ask of Funds (equity / loans)	20% equity and 80% loan
6	Use of Funds	The total project cost of US\$10 million is ear marked for acquisition of fruit processing equipment and plant.
7	Impact	Employment opportunity – 1000 farmers and 500 direct jobs. Improved household income hence increase access to health and basic services
8	Value Addition Oikos	The fruits received from farmers are processed into various products while promoting sustainable farming practices such as a forestation which mitigates the impact of climate change on environment.
9	Growth Plan 5 Years with Budget and Cash Flow	Cash flow from operations
10	Valuation in case of equity	\$14 millions
11	Exit Strategy in case of equity	Sell off
12	Issues to address and Risks	Modern technology, accreditation and quality standards

OPXX

Juice Processing

Agriculture

Uganda

	Page 2	Answers
13	Investment	\$10 millions
14	Investment size in \$M and use of funds	The total project cost of US\$10 million is ear marked for acquisition of fruit processing equipment and plant.
15	Co-Investers / lenders	n/a
16	Own contribution	Land, current facilities
17	Geography	XX, Uganda
18	Management of the Company	<p>Advisory Board of the XX Church of Uganda, Bishop XX, King of the XX kingdom are experts in business and investments.</p> <p>Dr. XX, the interim Company Chief Executive Officer, is a seasoned executive with over 25 years' experience managing developing initiatives in agriculture, education and micro-finance sectors.</p> <p>Mr. XX, Chief Finance Officer, is an experienced manager with over 25 years' experience managing business operations on behalf of several private entities in agriculture and supermarket industries</p>
19	Organizational and legal structure	<p>Advisory Board of the XX Church of Uganda, Bishop Dr. XX and experts in business and investments.</p> <p>XX the interim Company Chief Executive Officer, is a seasoned executive with over 25 years' experience managing developing initiatives in agriculture, education and micro-finance sectors.</p> <p>XX Chief Finance Officer, is an experienced manager with over 25 years' experience managing business operations on behalf of several private entities in agriculture and supermarket industries</p>
20	Impact of the Project / Company	Employment opportunity – 1000 farmers and 500 direct jobs. Improved household income hence increase access to health and basic services
9 June 21		FI-OF-Stueckelberger



4. Procedure for Applications to OF

- Applications template available
- Direct online contacts, until staff are operational (Aug 2021)
Geneva: stueckelberger@oikosinvest.org +41 79 419 68 12
Nairobi: mawudor@oikosinvest.org



5. Partnership OikosInvest-FaithInvest

OF and FI as partners with complimentary roles:

- OF in concrete investment deals and their monitoring/implementation
- OF focus on Africa, from 2022 enlargement to specific countries in Asia (South East and South Asia)
- OF focus on Christian project partners in first round, but open to all religions and non-religious in second phase
- FI with strong competence in interfaith, setting standards, formation and tools for members
- FI-OF cooperation in trainings, identifying projects for investments by OF, joint multilateral advocacy? Others to be defined.



شكراً جداً (Shokran Gidan) merci
baie dankie teşekkürler ngiyabonga
kealeboga diolch yn fawr धन्यवाद (Danyavad)
謝謝 (xiexie) thank you asante sana
gracias Спасибо (spacibo) danke
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grazie adube oshe dankjewel
obrigado/a