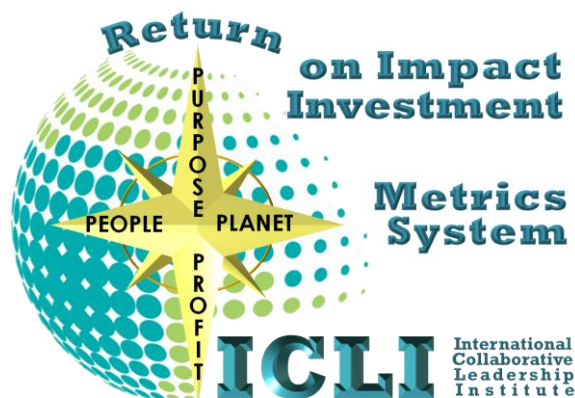


Background Material for Return on Impact Investment (ROII)



About the Need for Return on Impact Investment (ROII)

The new metric will be based on best practices, use multivariable analysis, real time analytics, econometrics, and big data analytics.

The ROII will be market sector agnostic, flexible to use for single and portfolio analysis, and become the antecedent to the impact investment market index, much as the SP500 and Quinipiac Index has become. The ultimate goal of this research initiative is to create the third party, independent impact investment market verifier.

Frequently, investors are asking the companies in which they invest to demonstrate long term thinking and to consider the mark they make on the world. Recognizing that financial performance and sustainability are not a zero-sum game, measurement of the total ROI which includes evaluation of the invested dollars on the environment, society, and governance has crept into annual reports of many publically traded companies without the benefit of a standard metric for analysis.

Investment houses must consider how their investment practices demonstrate an influence on society. These same financial houses need to access some method to quantify this influence while they cannot ignore the rise of ESG activism in their own boardrooms and within their investor community.

Impact investment brings with it the obligation to evaluate the financial return through a financial market method which accounts for influence on People, Planet, Profit, and Purpose.

This new standard for determining the P4 ROI is guided by best practices and thought leadership from the disciplines of social economics, social entrepreneurship, quantitative analytics, international development, collaborative econometrics, and mathematical modeling.



The first working conference which launches the plan to build this model is planned for September 20-22 with a research plan to be released for review and investment late Q4, 2018.

Information available at info@icli.org