



IAN CALLAGHAN ASSOCIATES

INCLUSIVE CAPITAL

My consultancy and advisory practice specialises in the arena of “inclusive capital” — investments which have the objective of allowing populations that would otherwise be underserved to enjoy the benefits of advances in technology, communications and finance, through products and services which are affordable and accessible to them. Typically these products and services will also bring with them environmental and social improvements and benefits, so another term often used is “impact investing”.

My personal experience in this field now spans a decade, on both the “sell” and “buy” sides of investments. I have been responsible for mobilising over \$500 million in all types of transaction from fundraising for companies, funds and financial institutions to corporate finance deals such as equity exits. These transactions have included some landmarks in impact investing: the largest ever microfinance deal; the

first micro-insurance fund; the first dedicated currency hedging platform; the first gender-focused microfinance equity fund.

SERVICES

- ▶ **Transaction advisory:**
Fundraising
M&A
- ▶ **Strategic advisory:**
Corporate Strategy
Capital Strategy
- ▶ **Senior Advisory and Board Positions**
- ▶ **Research**

All of the above for companies, funds and financial institutions

This experience has been garnered at three “blue-chip” institutions. Most recently, I was founding Managing Director of Enclude Capital Advisory (ECA), created from former Shorebank International and Triodos family entities. One of the very

few dedicated and regulated financial transactions arrangers in the impact space, ECA has to date arranged some \$250 million in transactions since inception in 2012. Prior to this I was a Senior Director with the Omidyar Network and at Morgan Stanley, I led the pioneering Microfinance Institutions Group, which arranged the two largest microfinance transactions ever completed.

Clients have also included some of the most prominent names in impact investing, including DFIs, foundations, and asset managers.

My professional network of associates can complement my skills and experience where needed, in order to fulfil mandates where a blend of professional skillsets is required.

The main services we can offer are listed in the box above.

Further details and blog: www.iancallaghanassociates.uk

Contact: ian@iancallaghanassociates.uk