

Investment Screening – Template

The screening template provides a framework for high-level scoping of business need and strategic fit.

OVERVIEW OF INVESTMENT OPPORTUNITY		
Short summary of the opportunity		
STRATEGIC ALIGNMENT	FINANCIAL VIABILITY	OPERATIONAL FEASIBILITY
<p>Market Environment</p> <ul style="list-style-type: none"> <input type="checkbox"/> Information on the attractiveness of the market: size (current and future), market growth rate? <input type="checkbox"/> What are market trends? Are we taking advantage of the future market trend by investing? <input type="checkbox"/> Is this investment opportunity aligned with the key success factors in this market? 	<p>Capital Intensity</p> <ul style="list-style-type: none"> <input type="checkbox"/> How much capital investment is required as start up for this opportunity? <input type="checkbox"/> What are the ongoing working capital requirements for this opportunity? 	<p>Management Capability</p> <ul style="list-style-type: none"> <input type="checkbox"/> Does our management have experience in this industry/geographic segment?
<p>Competitive Advantage</p> <ul style="list-style-type: none"> <input type="checkbox"/> What sustainable advantages will AGI enjoy over competitors? <input type="checkbox"/> What are the sustainable barriers to entry that will protect AGI investment? 	<p>Quality of Returns & Liquidity Event</p> <ul style="list-style-type: none"> <input type="checkbox"/> How quickly we can expect the investment deliver returns and cash flows? <input type="checkbox"/> How reliable are the expected returns and cash flows? <input type="checkbox"/> How will AGI realize the financial rewards from this investment? 	<p>Infrastructure Scalability</p> <ul style="list-style-type: none"> <input type="checkbox"/> Are the requisite infrastructure foundations in place to efficiently operate this investment? <input type="checkbox"/> Will we be able to achieve economy of scale with this infrastructure?
<p>Portfolio Synergies</p> <ul style="list-style-type: none"> <input type="checkbox"/> How is this investment aligned to existing business operations of AGI entities? <input type="checkbox"/> Will this investment add value to existing AGI entities? If yes, how? 	<p>Risk Assessment</p> <ul style="list-style-type: none"> <input type="checkbox"/> Does this investment have a risk profile in line with AGI Board guidance? <input type="checkbox"/> How easily can critical risks be mitigated and managed? 	<p>Deployment Model</p> <ul style="list-style-type: none"> <input type="checkbox"/> Do we have a clear execution plan for delivering this investment opportunity?
RECOMMENDATION <input type="checkbox"/> Go <input type="checkbox"/> No Go <input type="checkbox"/> More info Needed		

Recommendation will provide clarity on the decision of the screening process to either accept investment proposal for further evaluation or reject proposal or request more information.