

**ADFW**

ABU DHABI FINANCE WEEK

27-30 NOV 2023

Venue:  
ADGM, Abu Dhabi, UAE**COLLAB**

COLLATE. CONNECT. CREATE.

Asset Abu Dhabi GP x LP Programme  
27th Nov, 2023**EMIRATES**

FAMILY OFFICE ASSOCIATION

International Family Office Congress  
28th Nov, 2023**ADFW**

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28th Nov, 2023**Sindhu Krishna**Head of Sustainable Investments  
The Phoenix Group**Company Profile:**

Phoenix is the UK's largest long-term savings and retirement business. Our customer brands include SunLife, Standard Life, Phoenix Life, and ReAssure.

**Attendee Brief Bio:**

With her team of 20 FTEs, Sindhu Krishna analyses and integrates the ESG and other sustainability considerations across the wider Group's investment portfolios for customers and wider stakeholders shareholders. This is about c£259bn of AUA. She has been part of the Phoenix Investment team for nearly 12 years and prior to this worked in investments at Zurich Insurance Group. Sindhu is a CFA charter holder and also holds an MBA from Warwick Business School. She is also a Non-Executive Director and represents Phoenix on the board of Transition Pathway Initiative.

**Please list your organization's primary function:**

Long-term savings and retirement business

**What is your main function within the company:**

Head of Sustainable Investments

**Are you responsible for hiring investment managers?**

Yes

**Total Assets Under Management:**

c£260bn

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**What percentage of the total funds are allocated to alternatives?**

c6-8%

**Please indicate the range or size of allocations you make:**

In general, £50-75m average allocation be it on an individual deal level or a fund participation level (could go higher)

**In your own words please tell us specifically what types of investments you are looking for:**

Investments that help Phoenix offer good outcomes to customers and shareholders. Such outcomes would include attractive risk-adjusted returns, investment protection as well and achieving purpose-driven goals (sustainable outcomes including social and environmental outcomes)

**Have you invested in first-time funds in the past?**

Yes

**What is your IRR target and over what duration?**

Target IRRs can vary based on the type of capital invested along with considerations for credit, liquidity, and sustainability risks

**In what geographical regions and specific subregions or countries are you looking for future investments?**

Global, Europe, Asia, USA, MENA, and LATAM

**Please specify if you have any restrictions to investing in specific asset classes or strategies or regions:**

Typically investments in the investment grade space and those situated in OECD countries. Certain pockets of capital may impose other regulatory constraints that are informed by the Solvency II / PRA construct that we operate in.

**Products planning to invest within the next 3 to 6 months:**

Absolute Return, Commodities / Managed Futures, Credit funds, Equity Products, Farmland / Forestry / Agriculture, Fixed Income and Money Market, Hedge Funds, Infrastructure, Private Debt, Private Equity, Real Estate & Property Investments, Renewables & Cleantech, Venture Capital, and ESG

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