



Investing together for a better future

3 June 2016

National Native title Conference

Darwin



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PART 1

- About IBA Investments
- Response to the needs of the native title sector

***\$314 million portfolio - 37 Indigenous communities nationally
22 direct investments - 4 trusts - 34 co-investors - 90 lease customers***

**Direct
Investments**

**Commercial
Property
Solutions**

**Leasing
Solutions**

**Traditional
Owner and
Sustainability
Unit**

**Transaction
Assessment
Structuring &
Execution
Services**

**Investor
Relations**

Our Impact

WEALTH

Portfolio
~ **\$314 million**

Indigenous investors
own **\$88.2 million**
(30% of total)

INCOME

\$5.4 million paid to
Indigenous Partners
(annually)

SUPPLY CHAIN

\$4.8 million
(annually)

Monthly average of
40 Indigenous
suppliers

EMPLOYMENT

241 Indigenous jobs
(28% of total portfolio
workforce)

\$18 million – salaries
and training

Foundation for sustainable development

ENGAGE

**CAPACIT
Y**

**PRODUC
TS**

Client Vision
Dialogue
Co-design
Impact Strategies

Governance
Management
Advisory

IBA Funds
Asset Leasing
JVs

Our Product Suite

Responding to the needs of the native title sector

Direct

Investments

Partnerships, JVs

**Access to scale &
3rd part resources**

**Management
expertise**

IBA Funds

**Diversified asset
base**

**Stable income
streams**

**Low fees & private
sector expertise**

Asset Leasing

Leverage income

Concessional interest

**Community
development &
businesses**

Indigenous Investment Principles



INDIGENOUS
INVESTMENT
PRINCIPLES

IBA is the main sponsor

Developed by over 20 Indigenous organisations

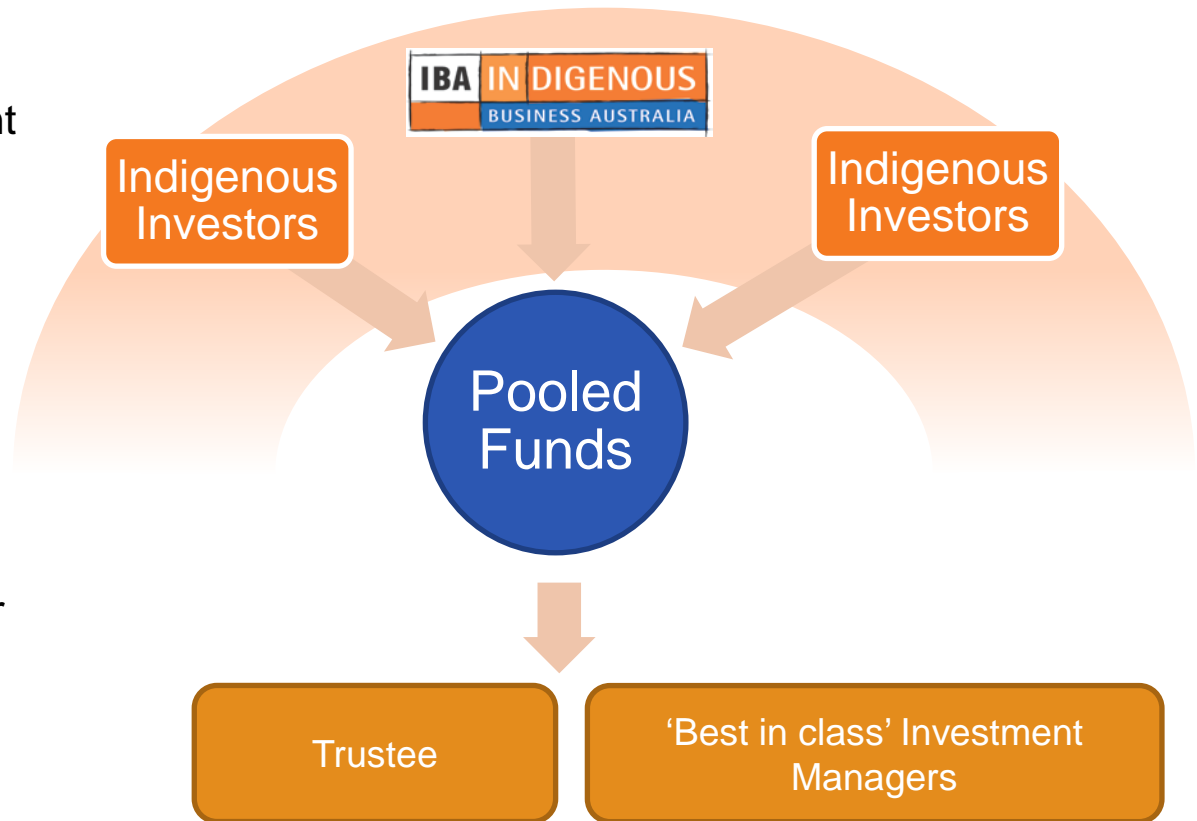
Assists organisations to establish investment governance that best meets their needs.



IBA FUNDS

Indigenous Prosperity Funds & Indigenous Real Estate Investment Trust

- Significant IBA co-investment
- Co-designed
- Indigenous owned
- Low fee structure
- Partnered with private sector specialists
- “Best in Class” investment managers



Part 2

- Investor case-studies
- Putting the *Indigenous Investment Principles* into practice
- Common scenarios

INVESTOR CASE STUDIES

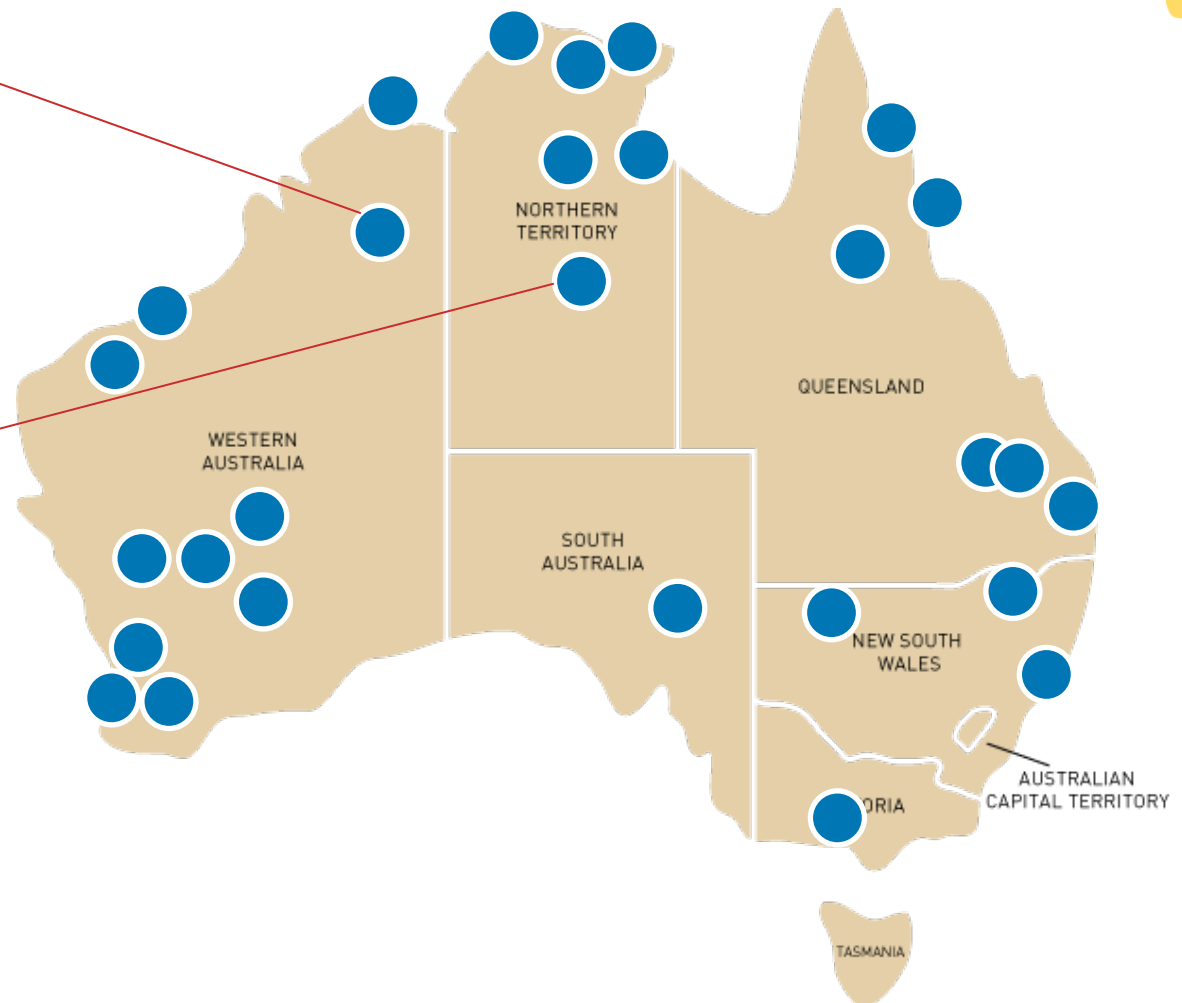
From our national investor community

Wunan

Rep: Ian Trust

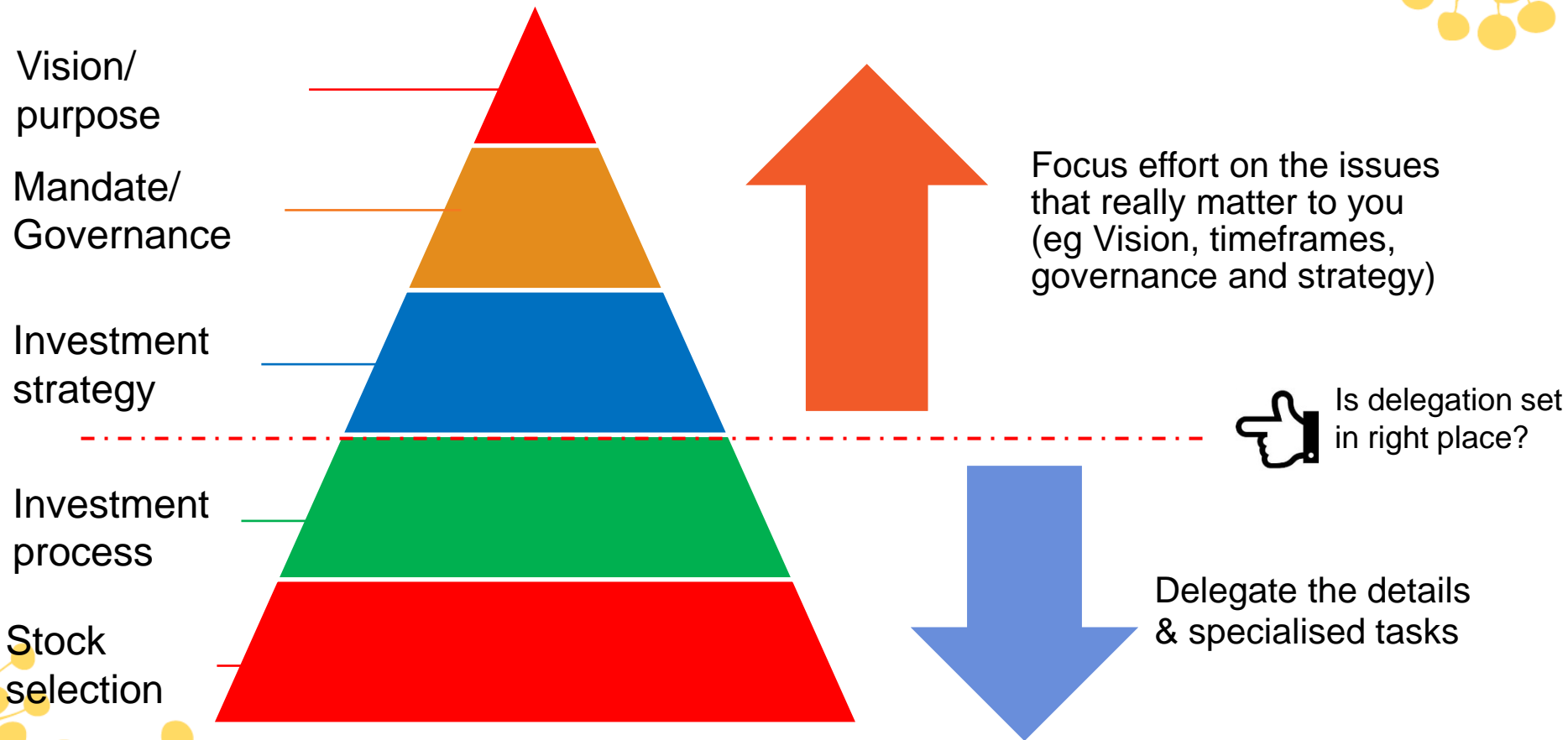
Manungurra

Reps: Graeme
Smith, Gordon
Noonan



Indigenous Investment Principles

Focus on strategy & delegate detail



IBA can assist Investors throughout all stages of the investment cycle

SPENDING NOW vs FUTURE SPENDING

Scenario:

- Native title settlement
- Traditional owners receive regular payments of \$250,000 per year over 20 years
- \$500k in term deposits
- The group wants to distribute the funds to family groups and support community development projects

INVESTING ON-COUNTRY OR OFF-COUNTRY?

Scenario:

- Organisation has accumulated funds of \$5 million in term deposits
- Royalty income is \$300,000 per annum for 10 years
- The board is thinking about investing in a tourism resort in the region

SPEND CAPITAL or LEVERAGE INCOME

Scenario:

- A native title organisation manages a portfolio of \$10 million which delivered a relatively stable income stream
- The board wants to generate local jobs by supporting local businesses and community development projects



MORE INFORMATION

**Should you have any further questions,
please contact**

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Australian Government

Indigenous Business Australia