

# Post-Investment Process

## Steps at Closing:

1. Signing of transaction documents after ensuring that these are in line with the agreed terms.
2. Completion of CPs: as per the transaction documents.
3. Remittance of investment money.

## Post-Investment:

1. Completion of all actions to be done after closing: these will be listed in the transaction documents.
2. Register the asset on Fundwave: coordinate with the company and identify the right person within the team to coordinate for quarterly / annual reporting.
3. Quarterly financial reporting: Sowmya usually sends out the requests on Fundwave and the company fills in the details.
4. Quarterly impact reporting: Along with the request for financial reporting, impact reporting is done simultaneously. The requests for financial and quarterly reporting go out together
5. Annual Forecasts: This is also collected on Fundwave. Requests are usually sent out within a month after the financial year starts.
6. ESG Reporting: This is an annual reporting. At present, we are doing it on the ESG kit (an excel sheet), however, we are trying to integrate the same on Fundwave. After assessment, we identify any gaps and agree on an action plan with the company to close the gaps identified. This action plan has timelines attached to it and we usually follow up from time to time to ensure completion. Usually, an ESG assessment will be prior to investment and an action plan will be formulated at that time itself and hence doing a fresh assessment is usually not needed.
7. Board meetings / committee meetings: These are usually held on a quarterly basis. Formally it will be recorded in the transaction documents. Few companies have board meetings more frequently (Aviom), whereas others less frequently (Arohan).