



THEME: HARNESSING INTEREST IN SUSTAINABLE INVESTMENT

We are excited to announce the official commencement of the **Think Business Investment Awards 2025**, marking the 11th edition of this prestigious celebration of Kenya's investment sector achievements. The gala event will take place on **Friday, 5th September 2025, at the Nairobi Serena Hotel, starting at 6:30 pm.**

Theme: Harnessing Interest in Sustainable Investment

This year's theme, *"Harnessing Interest in Sustainable Investment,"* underscores our commitment to recognising organisations and individuals who combine financial excellence with sustainable growth, innovation, strong corporate governance, and impactful sector education. The theme reflects the industry's shift towards investments that not only deliver returns but also create positive environmental and social impact.

Our Commitment and New Initiatives

Last year, we were unable to host the awards due to a low response, a challenge attributed to the five-year hiatus preceding our attempted return. We are determined to ensure the 2025 awards are a resounding success. To this end, we have implemented several strategic measures:

- **Media Partnership:** We have partnered with Radio Africa to promote the awards across their radio and digital platforms, ensuring extensive sector-wide awareness.
- **Sector Road Show:** We have commenced a road show to directly engage all players in the investment sector, renewing your buy-in and fostering stronger relationships.
- **Digital Campaign:** A comprehensive campaign will run on our website and all social media platforms to create awareness, provide updates, and facilitate active engagement with all stakeholders.
- **Customer Satisfaction Survey:** As a key component of the awards, we will conduct a comprehensive customer satisfaction survey to objectively assess customer experience across the sector. This survey will inform the judging process and ensure that customer perspectives are central to the awards.

For Previous Entrants

If you submitted entries last year, your submissions remain eligible for judging this year. You are also welcome to submit entries in additional categories or update and resubmit any time-sensitive entries, ensuring your achievements are fully recognised.

Let us unite to make the Investment Awards 2025 a landmark event, driving sustainable investment and sectoral growth. For further details or inquiries, please contact our awards team or visit www.thinkbusinessafrica.com.

Think Business is a leading competitive intelligence purveyor in the financial sector in Kenya, for over 20 years, engaging in strategic research, data analysis, publishing and industry awards, among them banking, insurance and investment.

A panel of expert judges will decide the winners in each category. The Judges' decisions will be based on entries as presented by companies coupled with financial information published by the companies. Judges may contact companies directly for any information they might need to help them in the judging process.

PKF East Africa, our Judging process partner, will oversee and audit the entire judging process including the selection of judges, financial data and market information presented as well as the determination of winners based on set criteria.

Important Timelines

Below is the schedule for the Investment Awards 2025:

Activity/Event	Date/Period
Launch of Awards	28th May 2025
Opening of Entries	1st June 2025
Road Show & Sector Engagement	1st June – 30th June 2025
Closing of Entries	15th July 2025
Customer Satisfaction Survey	1st July – 31st July 2025
Judging & Shortlisting	21st July – 15th August 2025
Announcement of Finalists	18th August 2025
Awards Gala	5th September 2025

Eligibility

- Entries are open to all licensed companies in the Capital Markets, Collective Investment Vehicles, Fund managers and Pension Funds and all other professionals in the industry licensed and regulated by the Capital Markets Authority (CMA) and Retirement Benefits Authority (RBA).
- Entries must be for projects that have been implemented within the previous 12 to 18 months.
- Each award category has its eligibility criteria. Kindly refer to it to ensure you are entering in the most appropriate categories.
- Where entry is submitted jointly by one or more parties, the judges have the authority to assess and determine if the entry was really a joint effort.
- The judges reserve the right to amend the judging criteria, change the maximum allocated score for any criteria, accept or reject entries.

Submission Guidelines

- Log on to our ThinkAwards portal <https://uat.craftsilicon.com/InvestmentAwards/> . You need accreditation to login.
- To get accreditation, share with us at least 2 emails addresses and telephone numbers of the people you have picked to submit your entries.
- Make sure it is clear what individual, department, company (or companies in the case of joint entries), you are entering. You can enter more than one project or program in a category.

- Fill in the entry slots with the required information. Note that each slot has a specified number of characters that should not be exceeded.
- Each category has its own judging criteria and parameters. Ensure that you provide information for each parameter as indicated in each award category.
- Pay attention to the maximum score awarded for each parameter.
- Attach relevant reference/supporting details including photos, videos as well as customer testimonials where applicable and available.
- If measurable targets were achieved, it is important to provide that evidence, i.e what the target was, if and how it was achieved.

N/B All information contained in your entries remain confidential and will only be used for the intended purpose of the awards and will not be released to any third parties without prior consent of the entrant.

AWARD CATEGORIES AND JUDGING CRITERIA

CLUSTER C: COLLECTIVE INVESTMENT SCHEMES

1. Unit Trust of the Year

Who qualifies to enter:

This category is open to all Registered Unit Trusts.

Judges will be looking at:

A. Corporate Governance Parameters	Max. Score
B. Other Parameters	Max. Score
Performance of each Trust over the last 18 months.	10%
Level of production and persistency in all production categories determined on the net flows (production less redemptions) over the last 18 months	5%
Innovation in technology, client service and communication to clients	10%
Value of assets under management.	10%
Allocation Criteria and Spread of Assets	5%
Ease of investing / withdrawing from Trust.	10%
Average Return on Investment on each Trust held.	10%
Overall growth of each Trust over the last 18 months (Clear demonstration of internal Vs external growth)	10%
Subtotal (Pro-rated to 70% of the total)	70%
TOTAL (A+B)	100%

2. Best Fund in Absolute Returns

Who qualifies to enter:

This category is open to all Registered Unit Trusts.

Judges will be looking at:

A. Corporate Governance Parameters	Max. Score
B. Other Parameters	Max. Score
Performance of each Trust over the last 18 months.	10%
Value of assets under management.	10%
Average Return on Investment	50%
Subtotal (Pro-rated to 70% of the total)	70%
TOTAL (A+B)	100%

3. Best Performing Equity Fund

Who qualifies to enter:

This category is open to all Registered Equity Funds.

Judges will be looking at:

A. Corporate Governance Parameters	Max. Score
B. Other Parameters	Max. Score
Performance of each Trust over the last 18 months.	10%
Overall growth of each Trust over the last 18 months (Clear demonstration of internal Vs external growth)	10%
Innovation in technology, client service and communication to clients	10%
Value of assets under management.	10%
Allocation Criteria and Spread of Assets	5%
Ease of investing / withdrawing from Trust.	10%
Average Return on Investment on each Trust held.	10%
Level of production and persistency in all production categories determined on the net flows (production less redemptions) over the last 18 months	5%
Subtotal (Pro-rated to 70% of the total)	70%
TOTAL (A+B)	100%

4. Best Performing Money Market Fund

Who qualifies to enter;

This category is open to all Registered Money Market Funds.

Judges will be looking at:

A. Corporate Governance Parameters	Max. Score
B. Other Parameters	Max. Score
Performance of each Trust over the last 18 months.	10%
Overall growth of each Trust over the last 18 months (Clear demonstration of internal Vs external growth)	10%

Innovation in technology, client service and communication to clients	10%
Value of assets under management.	10%
Allocation Criteria and Spread of Assets	5%
Ease of investing / withdrawing from Trust.	10%
Average Return on Investment on each Trust held.	10%
Level of production and persistency in all production categories determined on the net flows (production less redemptions) over the last 18 months	5%
Subtotal (Pro-rated to 70% of the total)	70%
TOTAL (A+B)	100%

5. Best Performing Balanced Fund

Who qualifies to enter;

This category is open to all Registered Balanced Funds.

Judges will be looking at:

A. Corporate Governance Parameters	Max. Score
B. Other Parameters	Max. Score
Performance of each Trust over the last 18 months.	10%
Overall growth of each Trust over the last 18 months (Clear demonstration of internal Vs external growth)	10%
Innovation in technology, client service and communication to clients	10%
Value of assets under management.	10%
Allocation Criteria and Spread of Assets	5%
Ease of investing / withdrawing from Trust.	10%
Average Return on Investment on each Trust held.	10%
Level of production and persistency in all production categories determined on the net flows (production less redemptions) over the last 18 months	5%
Subtotal (Pro-rated to 70% of the total)	70%
TOTAL (A+B)	100%

6. Best Performing Bond Fund

Who qualifies to enter;

This category is open to all Registered Bond Funds.

Judges will be looking at:

A. Corporate Governance Parameters	Max. Score
B. Other Parameters	Max. Score
Performance of each Trust over the last 18 months.	10%
Overall growth of each Trust over the last 18 months (Clear demonstration of internal Vs external growth)	10%
Innovation in technology, client service and communication to clients	10%
Value of assets under management.	10%
Allocation Criteria and Spread of Assets	5%
Ease of investing / withdrawing from Trust.	10%
Average Return on Investment on each Trust held.	10%
Level of production and persistency in all production categories determined on the net flows (production less redemptions) over the last 18 months	5%
Subtotal (Pro-rated to 70% of the total)	70%
TOTAL (A+B)	100%

7. Best Performing Other Fund

Who can enter:

This category is open to all registered unclassified Funds. E.g. Offshore Funds, Sharia Funds.

Judges will be looking at

A. Corporate Governance Parameters	Max. Score
B. Other Parameters	Max. Score
Performance of each Trust over the last 18 months.	10%
Overall growth of each Trust over the last 18 months (Clear demonstration of internal Vs external growth)	10%
Innovation in technology, client service and communication to clients	10%
Value of assets under management.	10%
Allocation Criteria and Spread of Assets	5%
Ease of investing / withdrawing from Trust.	10%
Average Return on Investment on each Trust held.	10%
Level of production and persistency in all production categories determined on the net flows (production less redemptions) over the last 18 months	5%
Subtotal (Pro-rated to 70% of the total)	70%
TOTAL (A+B)	100%

8. Best Unit Trust in Quality Client Service

Who qualifies to enter:

This category is open to all Registered Unit Trusts.

Judges will be looking at:

Parameters	Max. Score
Growth of the Trust over the last 18 months.	10%
A demonstrated excellent level of customer satisfaction	10%
Proof of the success of the high level of customer satisfaction through a high retention level of customers	10%
Evidence of a clear customer orientated approach	10%
Response to customer needs and enhanced quality of service	20%
Resources invested in Customer Service (Online Statements, Call centers, SMS Platforms etc)	10%
Availability of Personal Financial Advisors and their roles	10%
Redemption Period	10%
Any other measures to enhance client service (Social Media Interaction, Newsletters etc)	10%
Total	100%

9. Most Innovative Unit Trust

Who qualifies to enter:

This category is open to all entry is open to all unit trust products that entrants feel are most innovative.

Judges will be looking at:

The judges will be looking for breakthrough products developed through cutting edge design, research and development that have redefined the market by improving usability, access and value to the customer

Parameters	Max. Score
Demonstration of Investment in Research	25%
Execution of the Product Idea	25%
Impact of the Innovation to overall growth of the Trust	50%
Total	100%

10. Outstanding Industry Contribution- Collective Investment Schemes

Who qualifies to enter:

This category is open to individuals working in the Collective investment Schemes.

Judges will be looking at:

This is a special award which will be awarded to an individual considered to have made the greatest contribution to the growth of the Collective investment Schemes Sub Sector.

Appendix: ESG FACTORS

JUDGING CRITERIA_B. ENVIROMENTAL SOCIAL & GOVERNANCE (ESG) FACTORS	
Environmental	
Do you have any investments in green portfolios?	2%
Do you have a policy on funding non-environmentally friendly investments/ investors?	2%
What is the extent of your funding to environmentally friendly ventures? environmental protection	5%
Do you on your own or with other partners engage in environmental protection initiatives? List	7%
In your annual reporting do you produce a sustainability report? (Kindly attach it)	5%
Do you have financial solutions/products that generate a positive environmental impact?	2%
Do you have a policy on energy use, greenhouse gas emissions, water and hazardous waste	2%
Do you require your suppliers hold the same environmentally friendly values that you do?	5%
Sub total	30%
Social	
Are you in compliance with the banking sector charter?	2%
Do you have a deep understanding of the financial lives of your consumers? How are you using that insight to develop affordable, innovative and scalable products to help them improve their financial	5%
Do your working conditions, (even now with Covid-19) show a high regard for your employees' health	5%
Do you have a vehicle (i.e foundation) through which your CSR is undertaken?	2%
What is the level of staff, board and management involvements in the CSR activities?	2%
What is the regional spread (across the country) of the bank's CSR program (s)?	5%
What is the diversity of the CSR programs (i.e. education, health e.t.c)?	5%
What is the levels of innovation of your CSR program (identifying the need)?	5%
Have you committed to a long-term investment of resources towards the CSR program?	2%
Do you clearly measure the impact and solution of the CSR program(s) to the community?	7%
Sub total	40%

Governance	
Age diversity - What is the average age of board members?	2%
Gender - What is the ratio of Female: Male board members?	2%
Professional diversity- How many different professionals are on the board?	2%
Appointments - Do you have transparent and documented procedures for appointment of new Board members (e.g nomination committee)?	2%
Performance: Do you conduct annual performance evaluation of Board members, (including the CEO and Company Secretary)?	2%
Code of Ethics - do you have documented ethical standards and do you ensure it is complied with?	2%
Do you have a dedicated shareholder engagement/ outreach mechanism?	2%
Do you have an ESOP?	4%
Do you have competitive supplier acquisition process?	2%
Cybersecurity, being one of the biggest threats facing the global financial system, is it a top priority for your bank? Do you devote significant resources to protecting and continuously improving your	5%
Do you have an independent risk management and compliance process/system?	5%
Sub total	30%
TOTAL	100%