Endowments Investing Challenge shortlist reflects diverse response to impact-focused investor demands

Wednesday 25 February, 2026

Related Sectors:

Business & Finance ::

Related Keywords:

Impact Investing :: Environmental :: Social :: Endowment ::

Scan Me:

The UK charitable foundations and supporting organisations behind the future generations-focused Endowments Investing Challenge today announced their five shortlisted investment service providers and say they reflect a broad range of responses from the investment industry.

The shortlisted organisations are EdenTree Investment Management, Foresight, Octopus Capital, Tribe Impact Capital, and Triodos Investment Management.

The five organisations were selected from 60 applications, representing 55 investment service providers in seven countries, three continents, and reporting total assets under management of over £11 trillion. The shortlist is now competing for an investment mandate of up to £50 million. They will present their portfolios at a live event at London's Barbican Centre on 25 March, when the audience will vote for a winner.

"The number of applications shows us that despite turbulent times for sustainable investment strategies, there are firms responding to the demand from mission-aligned investors to create a portfolio that prioritises positive long-term impact," said James Anthony, Social Investment Portfolio Manager at Friends Provident Foundation.

The Endowments Investing Challenge was developed to find an investment service provider to develop a portfolio that puts the needs of future generations first. Seven young people - a Future Generations Panel – have been part of the process throughout, helping to shape the request for proposals and assessments and voting for a winner at the live event.

"The Endowments Investing Challenge is an opportunity to be innovative with how this money is invested, by taking the experiences of young people truly seriously," said Jayden, one of the members of the panel.

May, another panel member, added: "We've reached a strong consensus about the changes we want to see. The economy needs to change, and we've built confidence in how our experiences as young people can help make that change happen."

Sarah Benioff, Chief Executive of Cripplegate Foundation, said: " A shift is underway. More and more investors are looking for intentional impact from their capital – alongside transparency, inclusivity, and long?term thinking. This is a moment for investment service providers to rise to the challenge and deliver a balance of impact, financial performance, scalability, and the expertise needed to make it happen."

Responses from the shortlist

Andy Clark, CEO, EdenTree Investment Management, commented: "At EdenTree we believe investment should build a bridge to a fairer future. The Endowments Investing Challenge provides a unique opportunity to truly listen to the needs and concerns of the next generation. By partnering with the Big Issue Group to prioritise long-term positive impact, we hope to harness this opportunity to accelerate a more just, inclusive and resilient society while delivering lasting value for generations to come."

Seb Beloe, Managing Director at Foresight, said: "Our Sustainable and Impact strategies were built with investors like the Endowments Investing Challenge foundations firmly in mind. Our commitment is to serve our investors who want their capital to work hard in delivering competitive financial returns *by* helping to create a more sustainable global economy. We're excited about the opportunity to work closely with the foundations and to advance this shared mission together."

Jack Burnham, Head of Affordable Housing at Octopus Capital, said: "Rising demand and a shortage of affordable homes are creating one of the UK's most urgent challenges, but to accelerate the delivery of affordable homes, the sector needs long-term patient capital. That's exactly where endowments can play a vital role and where our Fund is well placed to provide mission-aligned investment opportunities."

Cate Quentin, Head of Wealth Management at Tribe Impact Capital, said: "At Tribe, we know capital is one of the most powerful forces shaping our future. Impact investing ensures that influence is used intentionally, delivering returns while addressing real-world challenges. The most exciting part of this

process is seeing younger voices genuinely influence that investment thinking. When future generations help shape capital allocation, we create strategies that are inherently more resilient, relevant, and aligned with lasting positive change."

Sjoerd Rozing, CFA, Portfolio Manager Triodos Future Generations Fund, commented: "One in three people worldwide is under 18, yet their interests are too often overlooked as stakeholders. It's time we put their needs at the heart of investing to secure a thriving future for all. The Endowments Investing Challenge brings vital awareness to this urgent issue, and we look forward to joining the event and sharing insights."

Company Contact:

Friends Provident Foundation

T. 07403868759
E. sarah.heathwood@friendsprovidentfound...
W. https://friendsprovidentfoundation.org/

Additional Contact(s):
enquiries@friendsprovidentfoundation.org.uk

View Online

Newsroom: Visit our Newsroom for all the latest stories:
https://www.friends-provident-foundation.pressat.co.uk