

 Early Warning System

EBRD-55712

Punkta Equity



## Quick Facts

Countries	Poland
Financial Institutions	European Bank for Reconstruction and Development (EBRD)
Status	Approved
Bank Risk Rating	U
Voting Date	2024-11-20
Borrower	Tricity Sarl
Sectors	Finance
Investment Type(s)	Equity



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### Project Description

According to the Bank's website, the project consists of an equity investment to acquire minority stake in select business lines of Punkta Group (the "Target") together with Innova Capital, a leading private equity firm based in Poland and a long-standing partner of the Bank, as the lead investor.

Through the proposed transaction, the Bank aims to foster regional consolidation, which supports in improving efficiency of the insurance brokerage market leading to greater market penetration and higher levels of industry growth over time.



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## Early Warning System Project Analysis

Categorised FI (ESP 2019).



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## Investment Description

- European Bank for Reconstruction and Development (EBRD)

Investment amount not available at the time of disclosure.



### Private Actors Description

*Tricity Sarl* is a new holding company to be established in Luxembourg. Punkta Group is one of the largest, independent insurance brokerage group in Poland.

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*Innova Capital* is a growth equity fund investment manager in Central and Eastern Europe (CEE).



Private Actor 1	Private Actor 1 Role	Private Actor 1 Sector	Relation	Private Actor 2	Private Actor 2 Role	Private Actor 2 Sector
-	-	-	-	Innova Capital Sp. z o.o.	Investor	-
-	-	-	-	Punkta Group	Undisclosed	-
-	-	-	-	Tricity Sarl	Client	-



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## Contact Information

### CONTACT INFORMATION

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### ACCESS TO INFORMATION

You can request information by emailing: [accessinfo@ebrd.com](mailto:accessinfo@ebrd.com) or by using this electronic form:  
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The Project Complaint Mechanism (PCM) is the independent complaint mechanism and fact-finding body for people who have been or are likely to be adversely affected by an European Bank for Reconstruction and Development (EBRD)-financed project. If you submit a complaint to the PCM, it may assess compliance with EBRD's own policies and procedures to prevent harm to the environment or communities or it may assist you in resolving the problem that led to the complaint through a dialogue with those implementing the project. Additionally, the PCM has the authority to recommend a project be suspended in the event that harm is imminent.

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[http://www.ebrd.com/eform/pcm/complaint\\_form?language=en](http://www.ebrd.com/eform/pcm/complaint_form?language=en)

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