Infra Dig – AIP tackles investing in infrastructure

Angus Leslie Melville

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The intricacies of investing in infrastructure are delved into in fantastic detail in this latest episode of Infra Dig, the IJGlobal podcast service, with 2 guests giving their views.

IJGlobal editorial director Angus Leslie Melville sits down for a chat with AIP Management co-heads of investment Greg Falzon and Domenico Tripodi for a far-reaching discussion on all matters infra.

This latest episode runs for a little more than 35 minutes and sees the AIP duo provide a 360 view of the infrastructure landscape.

This latest episode can be accessed on Spotify (embedded above) as well as through Apple Podcasts and on the Amazon service. It is also hosted across a slew of other platforms, open access on all of them.

Greg kicks off the discussion with an overview of "infrastructure" as an asset class laying down a view of the market that is informed by many years of having worked in it – with a particular slant on AIP's focus… equity investments in the energy transition space.

"Within that broad infrastructure definition," says Greg, "we focus on energy investments in the energy transition space. That covers the obvious things like renewable energy generation – so, wind and solar.

"But also, we need to get the green electrons that we have made to the right place at the right time. So that brings in grid, interconnectors, storage assets like batteries.

"And then they need to provide useful energy services, so that brings in thinks like electric transportation, electrification of industrial processes, heat, etc.

"We are quite diversified across that value chain and we can seek relative value across that entire field."

Domenico then tackles the role that infrastructure plays as an anchor in portfolio construction – and he sees investors rotating back to Core with a bit of Core + to up the ante.

He says of AIP Management: "We always try have a very sound, well thought investment strategy, selecting the most

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attractive markets, assets, partners and provide a superior risk-adjusted return.

"But still, when you go back to the societal role of infra and the risk attached to it, we need to remind ourselves that we are still talking about moderate risk, stable cash flows with downside protection which Core and Core +."

Tune in to the latest episode to hear about the above, and a good deal more…

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