IGUAKO CAPITAL · Sector brief

Data Analytics: sector brief

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KIND	EXPOSURE	POSITIONS
Deployment	US$71 million across 4 positions	4

DIVISIONS

Information & Data, Quantitative Strategies, Private Equity

Overview

Data analytics positions are selected on one question: does the business own its inputs. IGUAKO Capital funds analytics companies that generate or licence their own primary data under a documented lawful basis, and declines those that assemble a product from data they cannot account for. Principle three of the Ethical Technology Charter is applied at diligence, not after completion.

The 4 positions total US$71 million. One holds an agricultural yield and soil dataset built from its own field instruments. One supplies movement telemetry to cold-chain operators. One publishes reference pricing for regulated industrial inputs. The fourth builds analysis tooling sold to institutional customers under licence rather than as a data product. All four hold written consent or a licence for every source they draw on.

Restraint in inference is a commercial constraint as much as an ethical one. None of the four businesses holds consumer data, and none is permitted to infer anything about an individual. That narrows the addressable market and removes an entire class of supervisory and reputational risk. The Information Governance Committee approves each new data source before an acquisition proceeds.

Thesis

An analytics business without provenance is a liability with revenue attached. IGUAKO Capital pays a premium for primary data with a documented origin and a lawful basis, and accepts the smaller market that follows. The positions renew at high rates because the customer inherits the provenance along with the numbers.

Themes

- Primary datasets generated by instruments the business owns
- Movement telemetry for cold-chain operators
- Reference pricing for regulated industrial inputs
- Analysis tooling licensed to institutional customers
- Documented provenance and lawful basis tested at diligence

Case studies

Case	Year	Jurisdiction
Ras Jazira Analytics	2024	United Arab Emirates

Research

- 2021-05-19: The licence stack: what you buy when you buy a data business
- 2023-04-18: Provenance before analysis: the register and what it excludes
- 2024-10-15: A diagnostics dataset and the limits the firm placed on it
- 2025-02-18: Building a reference-data spine for markets the vendors do not cover
- 2026-04-21: Showing clients which decisions were model-assisted

Colophon

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