



Managed Portfolios

Client offerings and services

Overview

Portfolio Service Offering

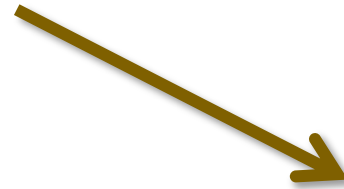
Managed Client Portfolios:

- Balanced client-centric portfolios following a specific mandate approved by the client.
- Asset allocation to exchange traded products across the various South African exchanges.
- Our investment committee utilises the extensive skill and experience of David Oberholzer, CFA and Olga Kotzé in portfolio construction and active investment management to tailor-make boutique investment portfolios.
- Investment portfolio minimums apply

The Investment Process

1. Meet with clients

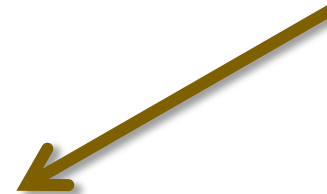
We meet with clients to identify specific client needs and investment objectives.



2. Construct client mandate

A broad client mandate is constructed and proposed to the client catering for your needs of:

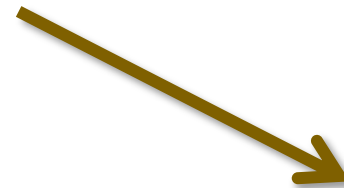
- Capital growth;
- Asset diversification;
- Managing investment risks; and
- Regular income



3. Strategic Asset Allocation Proposition

The portfolio manager proposes a strategic asset allocation to the investment committee.

This consists of a diversified portfolio of equities, bonds, listed property and commodities, based on your needs.



The Investment Process (cont'd)...

The Investment Process (cont'd)



4. Employing fundamental analysis

We employ fundamental analysis and strict screening criteria to identify investments that meet your needs.



5. Continuous assessment

Market conditions are monitored daily, and adjustments are made to your portfolio if we see an increase in any market risk or potential investment opportunities.

We also provide:

Monthly statements;
Quarterly portfolio reviews and
Performance reviews to each investor

Example Asset Allocation – South Africa Managed Portfolios



Note: This is an example of a portfolio asset allocation and selection. Portfolios are designed to suit individual investor requirements

Applicable Fees



Management fees
are discussed
individually with
clients

We Grow What You Value

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We Grow What You Value

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