



Financial Services

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 our in-house experts in portfolio construction and active investment management, to tailor **boutique investment portfolios** to every client's needs.
- Investment portfolio minimums apply

The Investment Process



Get to know you

We meet with clients to identify specific goals and determine how we can best assist your needs.



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 wants.



Construct client mandate

A broad client mandate is constructed and then proposed.

We prioritise the following needs:

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

Investment Process (cont'd)...

The Investment Process (cont'd)



Employing fundamental analysis

We execute an analysis and strict screening criteria to identify investments that meet your needs.



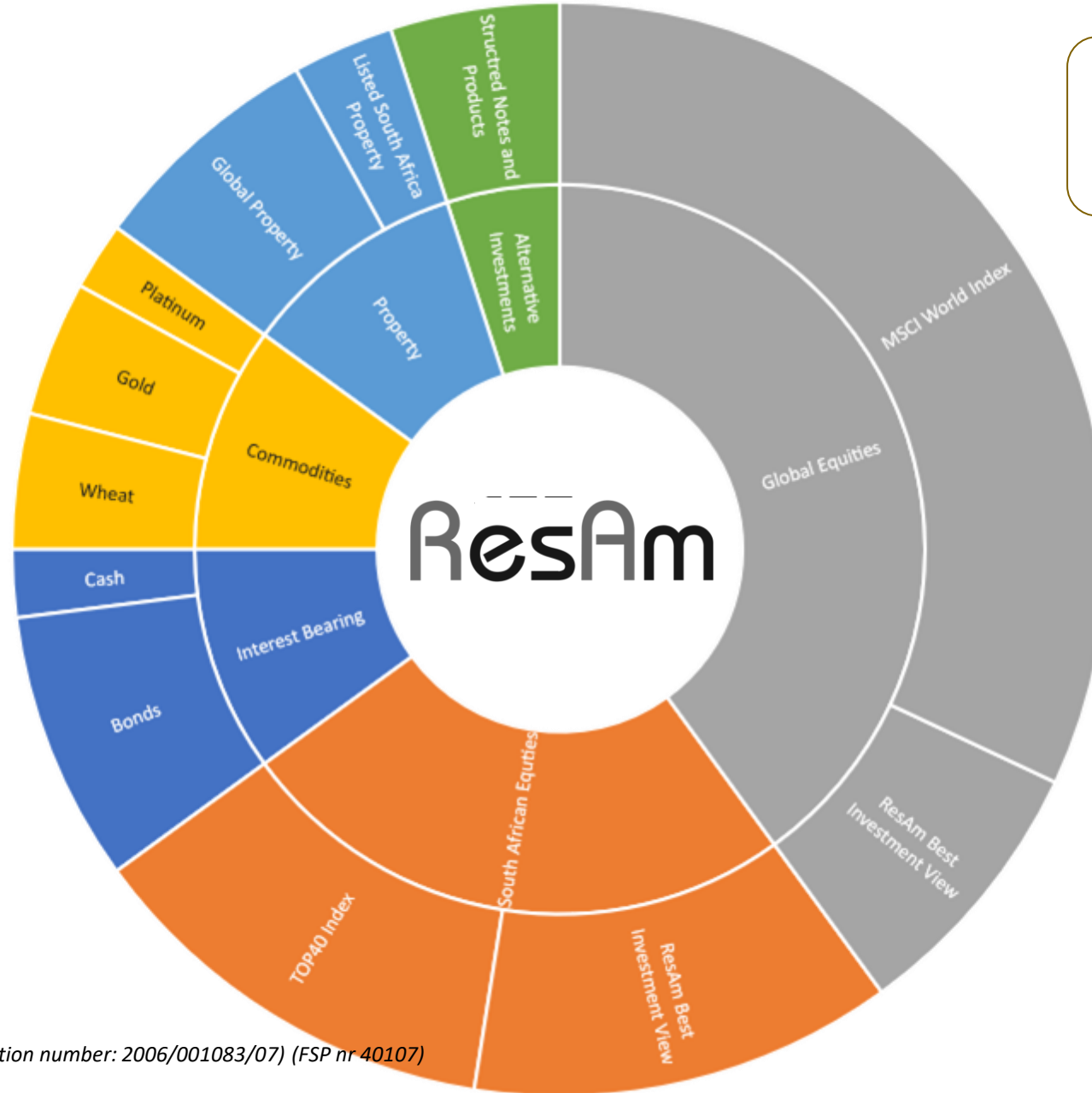
Continuous assessment

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.

Each client receives:

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 each client

We Grow What You Value

We'd love to hear from you!



 info@resam.co.za

 011 480 8630

 [LinkedIn](#)

 www.resam.co.za

 Kaya House, Ground Floor,
195 Jan Smuts
Avenue, Rosebank,
Johannesburg, 2193

