

# *focused 75 domestic*

Just as the African drum has its own unique rhythm, the light bulb represents a specialised sense of innovation and intellect. Find your own unique investment and stay light-years ahead.



## Focused range **Focused 75 Domestic**

This aggressive multi-manager portfolio is aimed at maximum long term capital growth.

### About the Focused range

The Focused range of multi-manager portfolios provides a robust solution to accumulating long term capital through varying phases of the market's cycle. The range provides risk-targeted solutions around an array of different strategic asset allocations to reflect different tolerances to market risk.

### Portfolio mandate

The portfolio is designed to maintain a strategic equity exposure of 75%. Underlying managers have been given broad active mandates within their specific market sectors. Ideally, the portfolio should outperform the benchmark by maximising the stock selection views of an array of specialist managers and minimising, where possible, the style and industry biases at the aggregate portfolio level.

### Investment strategy

- Employs multiple specialist managers who are mandated to derive alpha (excess return) from differentiated segments of the market
- Employs the highest allocation to equities permitted by Prudential Investment Guidelines
- Maximises the portfolio's exposure to those investment decisions that have the highest probability of adding value over time.
- Regulation 28 compliant

### Investor profile

#### Time horizon

- Long term (12 years +)

#### Needs

- Maximum long term capital appreciation

#### Risk meter

- The portfolio may experience a high degree of volatility in the short term due to the high equity content
- Possibility of capital loss over short term due to high equity content
- Low income yield



### A flexible asset allocation process: Dynamic Rebalancing

This product has a flexible asset allocation process that enhances performance without either compromising on the acceptable level of risk in the portfolio, or the probability of achieving our targeted performance by relying on market forecasts. This process uses a combination of fundamental and technical signaling techniques to detect when markets show considerable long term momentum, or extreme points of valuation. It will adjust the actual asset allocation by upweighting or downweighting an asset class from the strategic allocation with a maximum tolerance limit, according to the risk budget of the portfolio.

## Asset allocation and benchmark

This portfolio has a strategic asset allocation and benchmark of:

### 75% Domestic equity

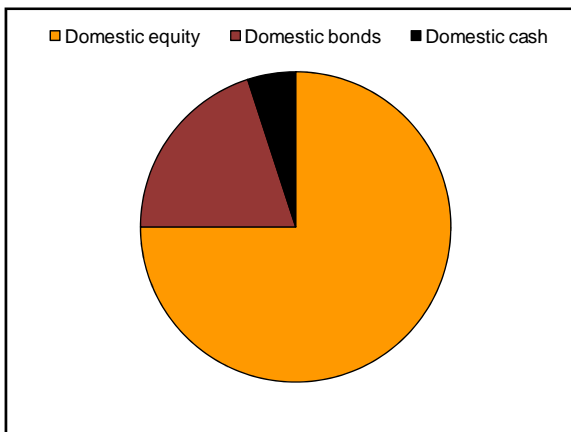
- FTSE/JSE Shareholder Weighted All Share Index (SWIX)

### 20% Domestic bonds

- BESA All Bond Index

### 5% Domestic cash

- STeFi Index



The product can deviate from the strategic asset allocation with an active allocation tolerance limit of not more than 4%, depending on the active asset allocation process

## Specialist manager mandate allocations

### Equities

- Prudential
- Coronation
- RE:CM
- Allan Gray
- Investec

### Bonds

- RMB
- Prescient
- Futuregrowth

### Cash

- RMB
- Prescient

**Note:** The portfolio complies with the prudent investment guidelines set out in Regulation 28 of the Pension Funds Act. This fact sheet does not purport to offer advice or make any recommendation. Always consult with your professional advisor before making any investment related decision.

- Authorised as a financial services provider (FSP) under the Financial Advisory and Intermediary Services Act, 2002 number 19840
  - Registered as an administrator in terms of Sec 13B of the Pension Funds Act, number 24/401
- E&OE

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