

PLATINUM MODERATE PORTFOLIOS

APRIL 2024

FUND INFORMATION:

Benchmark	(ASISA) South African MA Medium Equity
Target	Namibia CPI + 5%
Risk Profile	Moderate
Time Horizon	Five Years

PORTFOLIO USE:

- For investing **medium term at limited risk**.
- **Maximum 50% equity exposure**.
- Regulation 13 compliant as well as non-compliant.
- The portfolio uses fund managers with a proven ability to **protect capital** as well as achieve **optimum growth**.

ASSET MANAGERS

	Allan Gray Namibia
	Capricorn Asset Management
	Ninety One Asset Management
	M&G Investments
	Peregrine Capital
 FAIRTREE	Fairtree Asset Management
	Gryphon Asset Management
	Arysteq Asset Management

April 2024	1 Year	3 Years	5 Years
Sanlam Portfolio (Reg. 13)	11.2%	11.3%	9.4%
Sanlam Portfolio (Non Reg. 13)	10.0%	12.7%	13.4%
CAM Portfolio (Non Reg.13)	7.6%	9.9%	10.5%
Momentum Portfolio (Reg. 13)	11.2%	10.2%	9.1%
Momentum Portfolio (Non Reg.13)	13.0%	12.6%	13.1%
Old Mutual Portfolio (Reg. 13)	10.6%	10.9%	9.3%
Old Mutual Portfolio (Non Reg. 13)	10.7%	11.3%	9.7%
Benchmark	6.9%	7.5%	7.4%
CPI + 5%	9.8%	10.9%	

NOTES:

- Performance rates exclude fees.
- Past performance is not a guarantee for future performance.