

# PLATINUM CAUTIOUS PORTFOLIOS

SEPTEMBER 2024

## FUND INFORMATION:

Benchmark	(ASISA) South African MA Low Equity
Target	Namibia CPI + 4%
Risk Profile	Cautious
Time Horizon	24 months - 36 months

## PORTFOLIO USE:

- For investing **medium term** at limited risk.
- Maximum **35% equity** exposure. High exposure to cash and bonds.
- Regulation 13 compliant as well as non-compliant.
- The portfolio uses fund managers with a proven ability to **protect capital**.

## ASSET MANAGERS

	Allan Gray Namibia
	Capricorn Asset Management
	Ashburton Investments
	NAM Coronation
	Peregrine Capital
	Arysteq Asset Management
	M&G Investments
	Gryphon Asset Management

September 2024	1 Year	3 Years
Sanlam Portfolio (Reg. 13)	15.0%	10.3%
Sanlam Portfolio (Non Reg.13)	21.6%	16.4%
CAM Portfolio (Non Reg. 13)	15.1%	11.8%
Momentum Portfolio (Reg. 13)	15.1%	11.9%
Momentum Portfolio (Non Reg. 13)	21.7%	16.2%
Old Mutual Portfolio (Reg. 13)	16.6%	12.4%
Benchmark	16.4%	9.3%
CPI + 4%	7.3%	9.6%

NOTES:

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