

# PLATINUM MODERATE PORTFOLIOS

SEPTEMBER 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

September 2024	1 Year	3 Years	5 Years
Sanlam Portfolio (Reg. 13)	18.3%	11.1%	8.9%
Sanlam Portfolio (Non Reg. 13)	20.5%	14.6%	13.8%
CAM Portfolio (Non Reg.13)	15.8%	12.3%	11.9%
Momentum Portfolio (Reg. 13)	19.5%	12.8%	11.0%
Momentum Portfolio (Non Reg.13)	21.3%	16.1%	13.7%
Old Mutual Portfolio (Reg. 13)	18.4%	13.5%	11.5%
Old Mutual Portfolio (Non Reg. 13)	19.2%	13.9%	12.1%
Benchmark	16.4%	9.3%	8.5%
CPI + 5%	8.3%	10.6%	

NOTES:

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