

PLATINUM CAUTIOUS PORTFOLIOS

AUGUST 2025

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

February 2025	1 Year	3 Years
Sanlam Portfolio (Reg. 13)	9.04%	12.65%
Sanlam Portfolio (Non Reg.13)	8.67%	13.2%
CAM Portfolio (Non Reg. 13)	10.37%	13.72%
Momentum Portfolio (Reg. 13)	10.10%	13.30%
Momentum Portfolio (Non Reg. 13)	14.38%	14.08%
Old Mutual Portfolio (Reg. 13)	14.53%	12.04%
CPI + 4%	7.20%	9.10%

NOTES:

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