



MOTSWEDI

Economic Transformation Specialists

Asset Manager Survey

March 2024





Motswedi

Economic Transformation Specialists

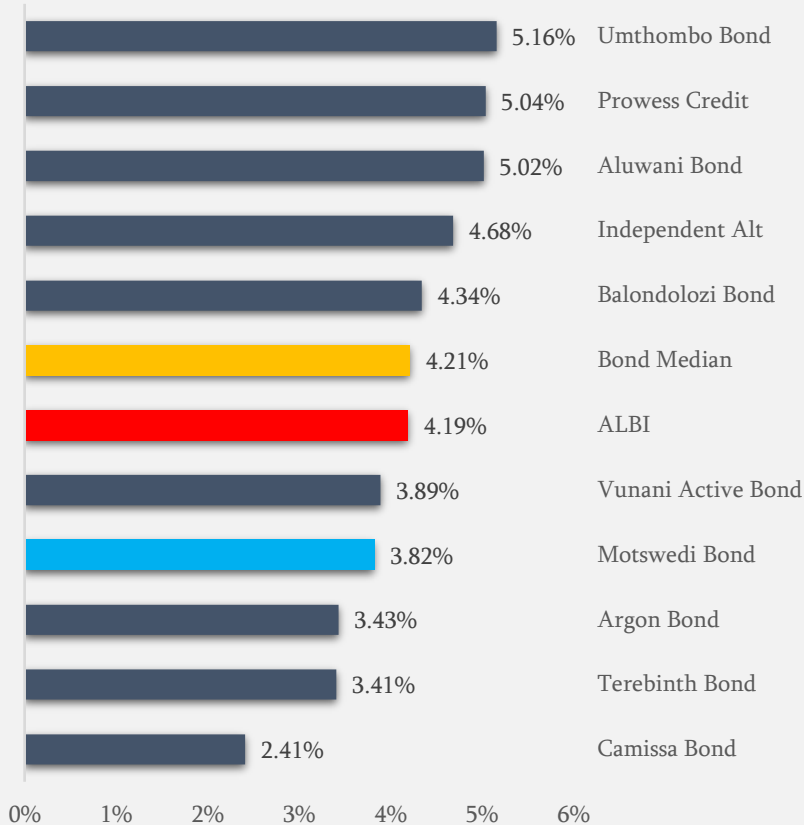
Mission Statement

To help develop the South African economy, through the asset management industry, by encouraging real economic transformation, financial inclusion, gender equality, pay equity, job creation, and social equity in a systematic and responsible way, both in the public and private markets. In doing so, stimulate the asset management industry to deliver a more competitive and vibrant environment for capital investors.

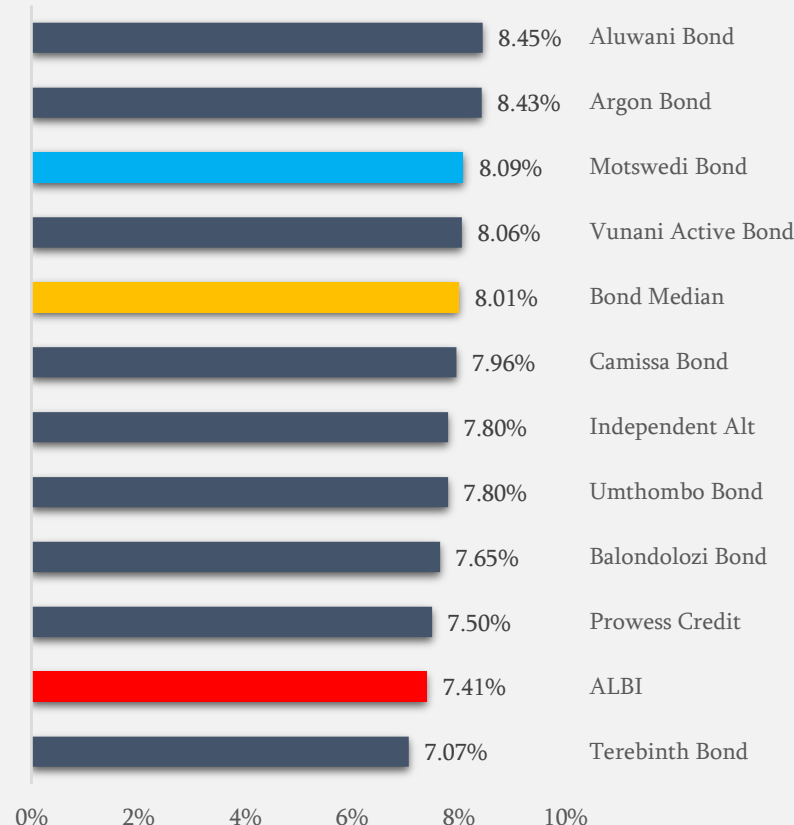


SA Bonds - ALBI

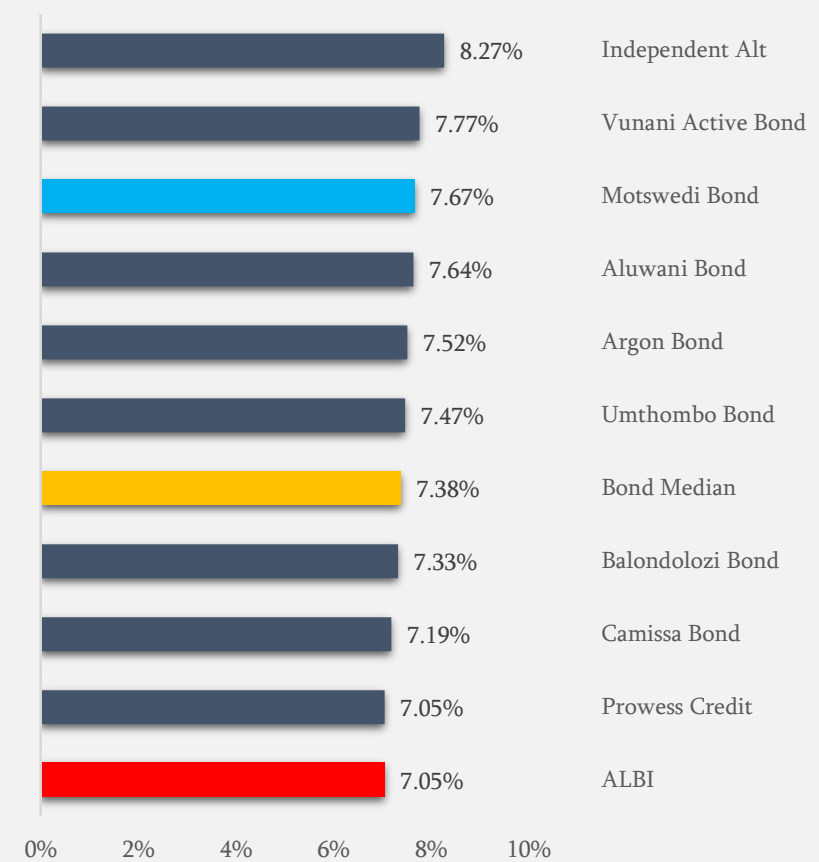
SA Bond
All Bond Index (ALBI)
1 year to March 2024



SA Bond
All Bond Index (ALBI)
3 years to March 2024

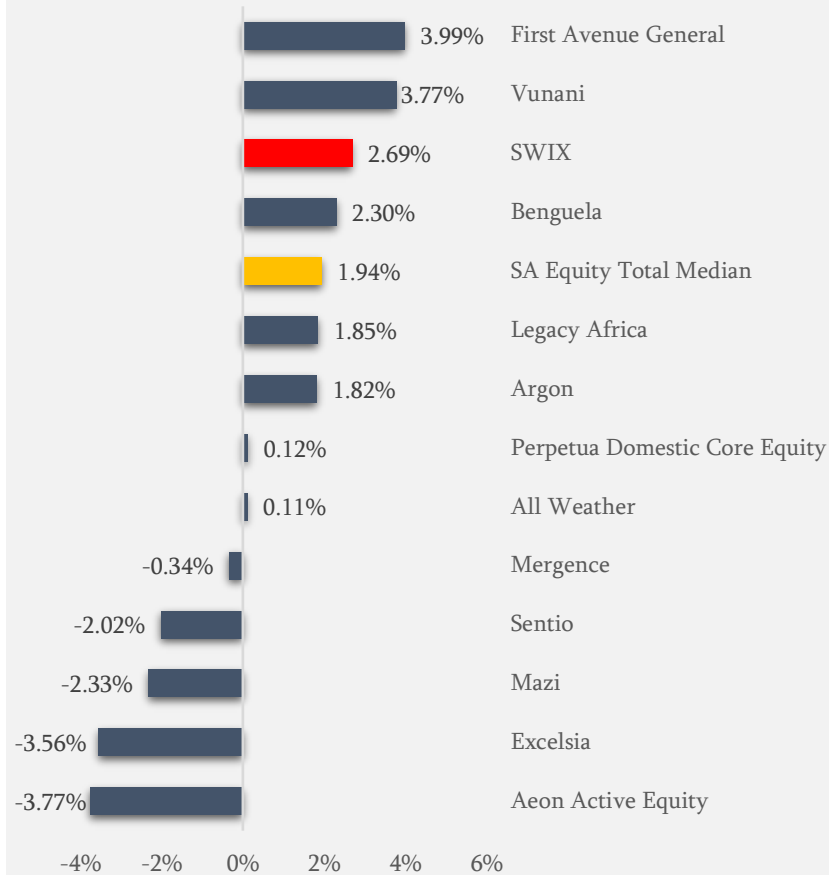


SA Bond
All Bond Index (ALBI)
5 years to March 2024

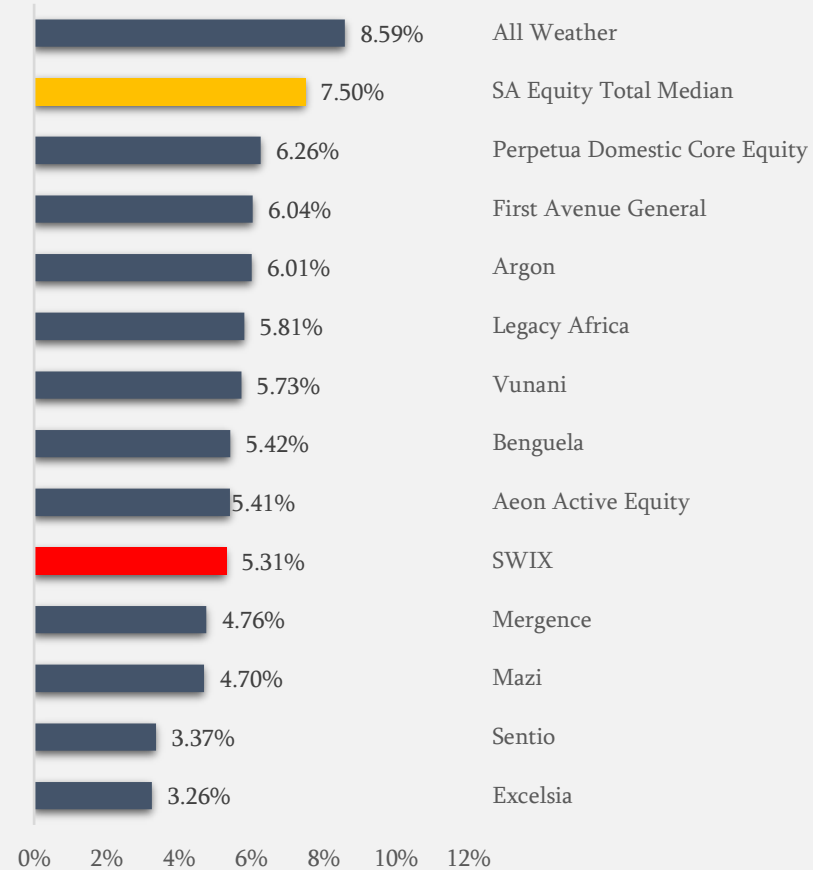


SA Equity - SWIX

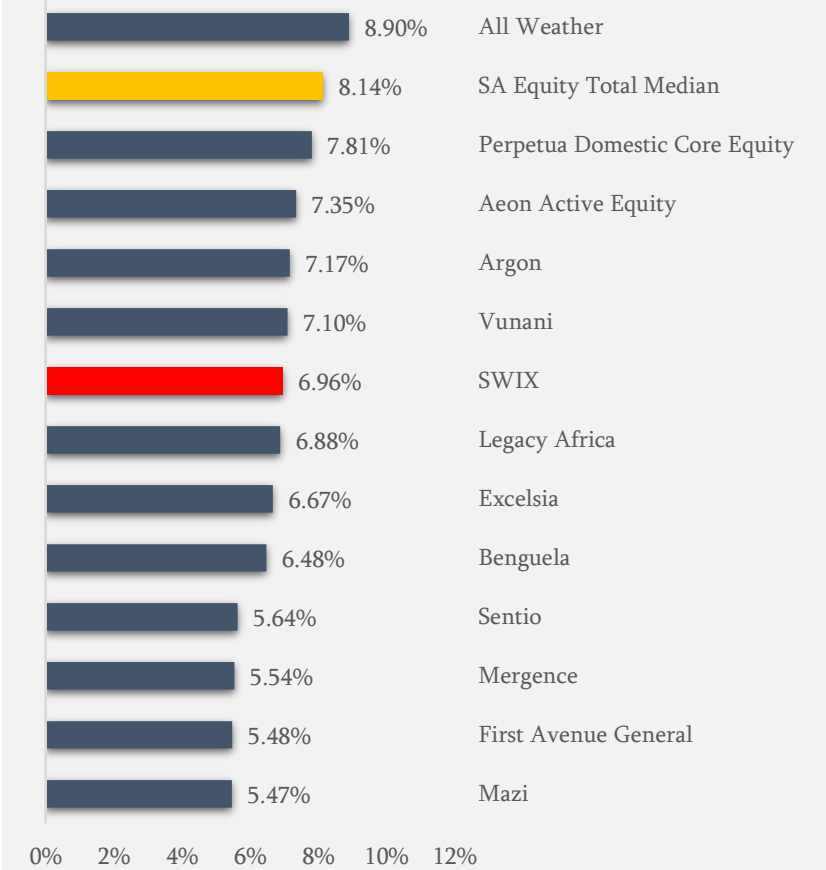
SA Equity
SWIX (Benchmark Cognisant)
1 year to March 2024



SA Equity
SWIX (Benchmark Cognisant)
3 years to March 2024

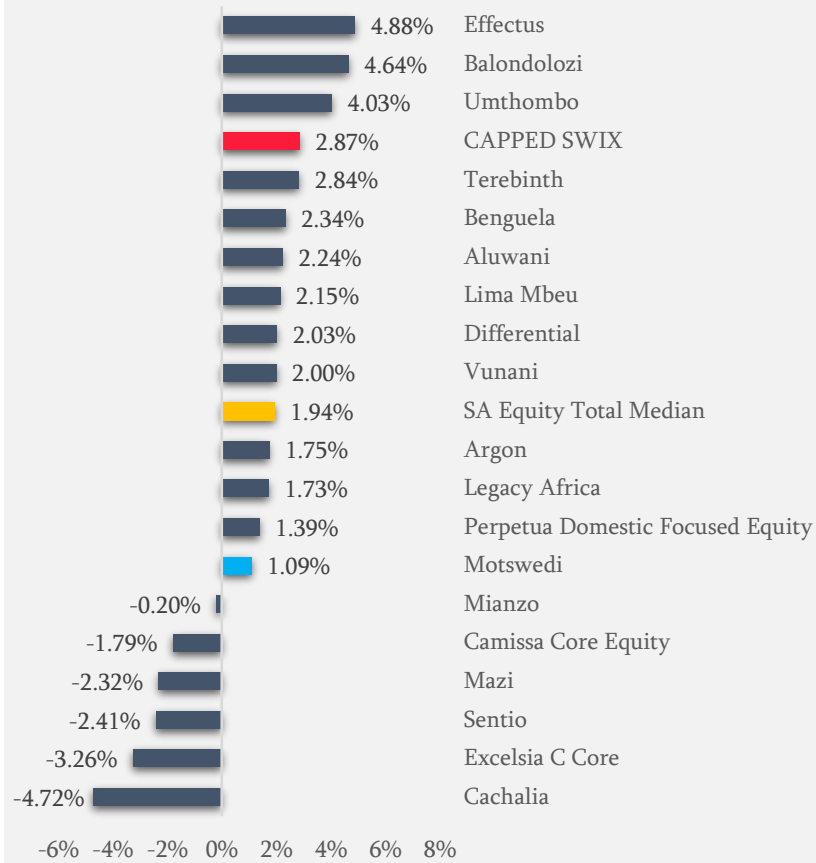


SA Equity
SWIX (Benchmark Cognisant)
5 years to March 2024

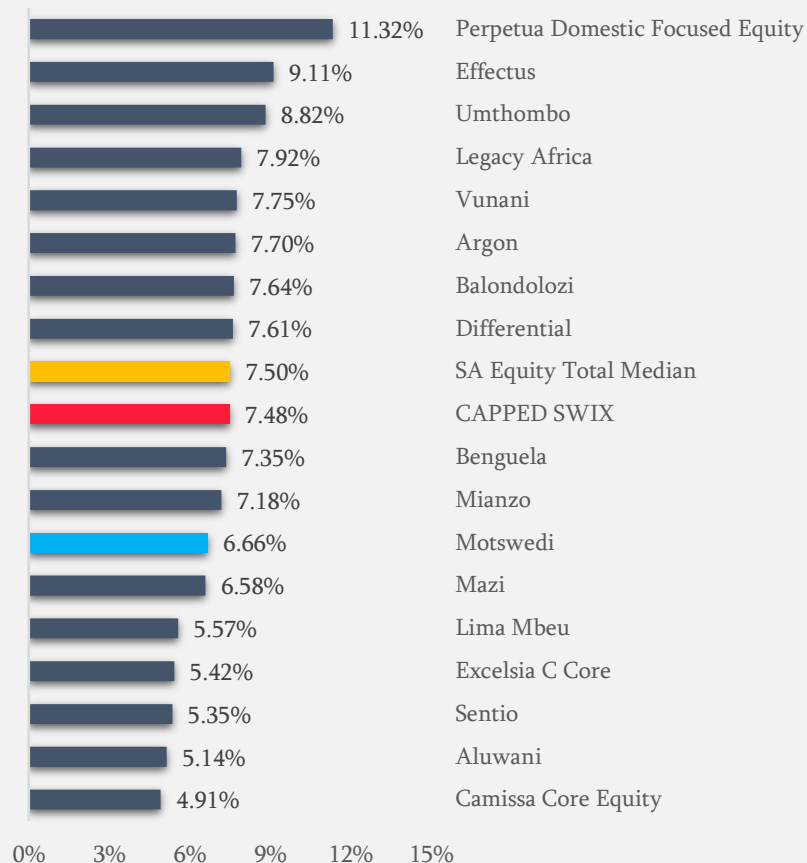


SA Equity - Capped SWIX

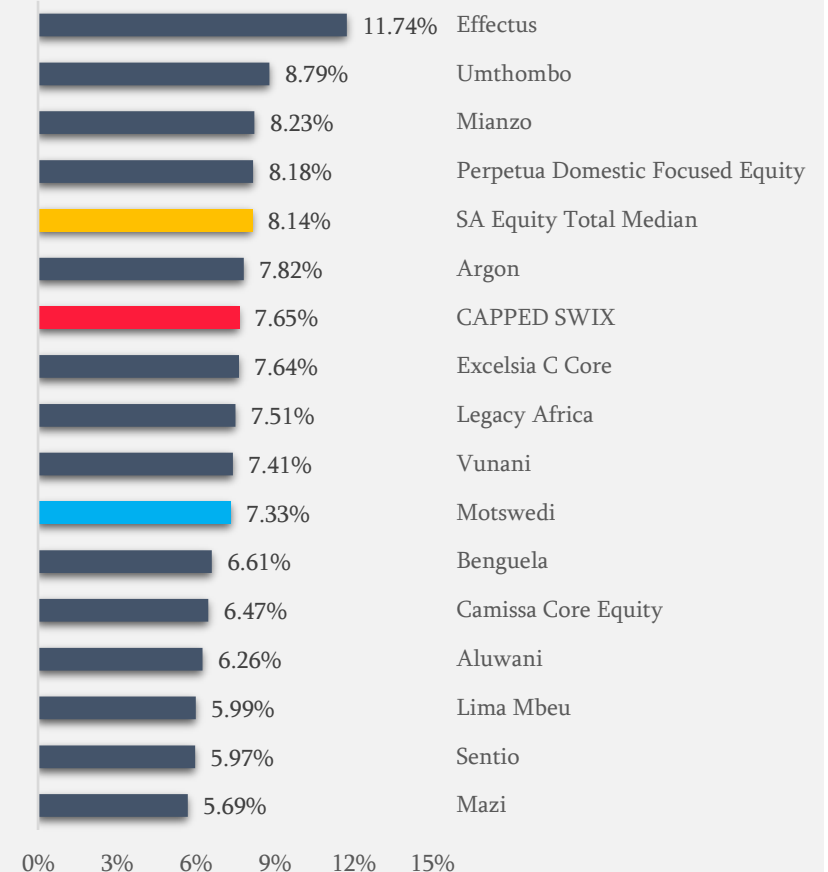
SA Equity
Capped SWIX (Benchmark Cognisant)
1 year to March 2024



SA Equity
Capped SWIX (Benchmark Cognisant)
3 years to March 2024

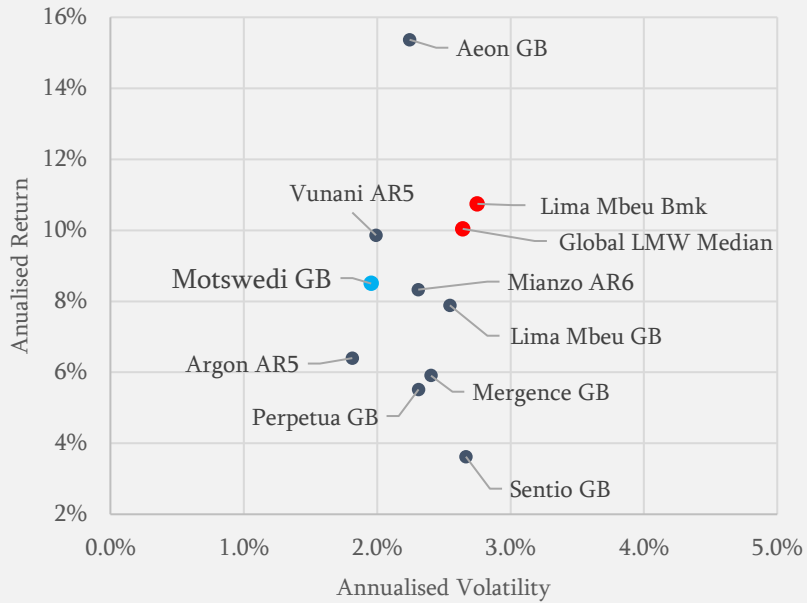


SA Equity
Capped SWIX (Benchmark Cognisant)
5 years to March 2024

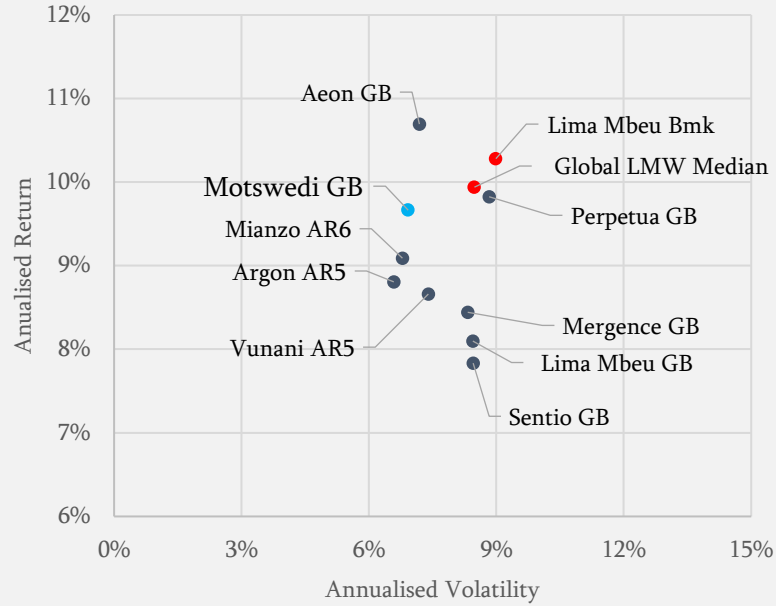


Global Multi-Asset (Regulation 28)

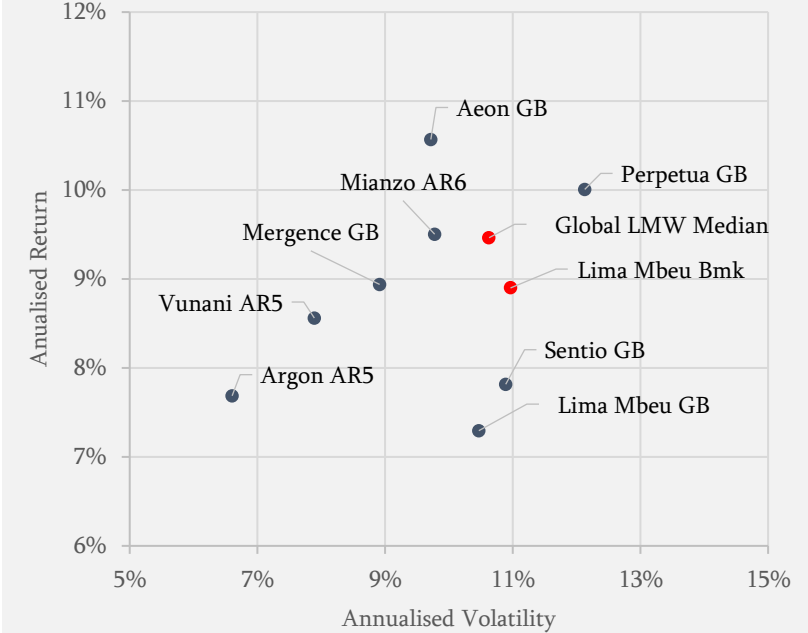
Global Multi-Asset
Medium to High Equity
1 Year to March 2024



Global Multi-Asset
Medium to High Equity
3 Years to March 2024



Global Multi-Asset
Medium to High Equity
5 Years to March 2024



Benchmarks/ Target

Headline CPI + 5%	Aeon Global Balanced	Argon Absolute Return	Mianzo Absolute Return	Mergence Absolute Return	Mergence Global Balanced	Motswedi Balanced	Perpetua Global Balanced	Vunani Absolute Return
Custom	Lima Mbeu Multi-Asset							

THANK YOU

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Definitions:

Emerging asset manager means firm with total AUM less than R50 billion

Mainstream asset manager means firm with total AUM more than R50 billion

Transformation means;

- Minimum 51% Black ownership
- Minimum 50% Black representation at Board
- Minimum 50% Black representation at Management
- Minimum 50% Black representation in Investment Team or Portfolio Management

Black people means Africans, Coloureds and Indians

Mainstream median means the middle number in a sorted, ascending or descending, for investment returns of strategies with market value above R50 billion

ALBI means All Bond Index

SWIX means FTSE/JSE Shareholder Weighted Index All Share

Capped SWIX means FTSE/JSE Capped Shareholder Weighted Index All Share

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