Investment Portfolio Profile

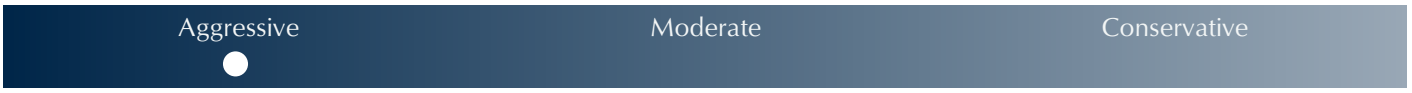
The investment managers selected for this portfolio may invest in global equities within predominantly developed countries, denominated in a variety of global currencies. The managers may either have active investment management styles or quantitative investment management styles. Through active stock selection they keep volatility of returns below that of the average active global equity portfolio. Apart from the actively managed portion, a relatively small portion is invested in an enhanced equity-index fund, which may further reduce the relative volatility of the portfolio.

Global Investment Strategy

At times Investment Solutions may have a local cash allocation for liquidity purposes. Global availability depends on legislation and capacity.

Risk Meter

Risk refers to the predictability or volatility of returns over a five-year period.



The portfolio is aimed at investors pursuing exposure to global equity markets. Investment Solutions expects this portfolio to have:

- A low probability of capital loss over the longer term (however, due to volatility of the exchange rate of the currencies there may be capital loss in Rand terms)
- Investment returns in Rand terms to be more volatile due to movements in the exchange rate of the currencies

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