Investment Solutions

Allan Gray Classic Balanced

Single Manager Portfolio Range

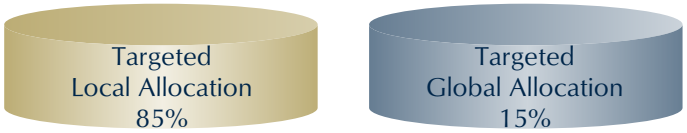
Investment Portfolio Profile

The local component of the assets in this portfolio is managed by Allan Gray Limited (Allan Gray) and the global component by Investment Solutions in its Global Balanced Portfolio.

Allan Gray is a focused, bottom-up share-selecting investment manager that buys companies with strong balance sheets and superior management teams. The manager follows a Deep Value approach, investing in assets it believes offer superior fundamental value. It analyses company value by comparing the price of the asset to its intrinsic or underlying value. Assets trading at prices significantly below intrinsic value are considered attractive and could be included in Allan Gray's investment portfolios.

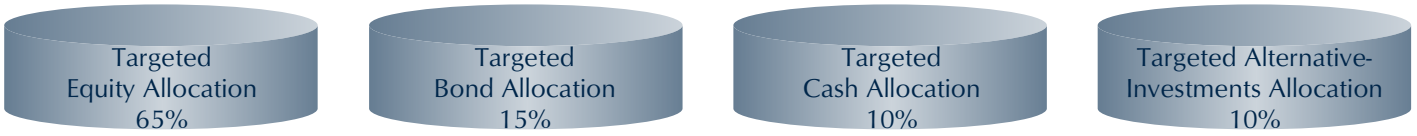
Investment Strategy

Local and Global Allocation



Local Investment Strategy

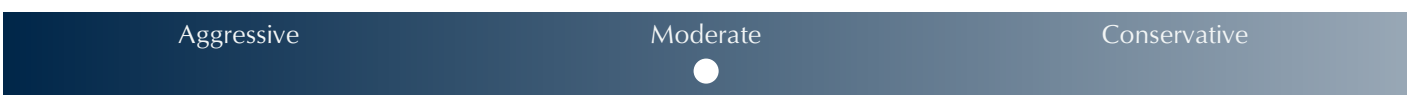
Global Investment Strategy



The asset allocation may be adjusted away from the targeted allocation limits depending on market conditions. Global allocation is optional and availability depends on legislation and capacity. More detail on the global component is included in the Global Portfolio Range brochure.

Risk Meter

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



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IT ALL ADDS UP!

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