OLD MUTUAL Investment Group | Absolute Return Investments

"Capital protection is the cornerstone of our investment philosophy."
Tom Connell | Boutique Head

BOUTIQUE OVERVIEW

The Absolute Return Investments boutique targets consistent inflation-beating returns. The business focuses exclusively on providing risk-managed investment offerings. The team's investment experience has been key to establishing a distinguished long-term track record for delivering absolute returns for our clients, irrespective of market conditions. Our business has been growing strongly as an increasing number of investors turn to us for their own solutions.

We tailor-make and manage investment strategies to match our clients' exact risk and return objectives, achieving an absolute or a targeted return for a specified risk across the full spectrum of asset classes. The common objective of all of our Absolute Return Investments is capital protection.

INVESTMENT PHILOSOPHY

Capital protection is the cornerstone of our investment philosophy. We are dedicated to structuring portfolios for more risk-averse investors whose priority is capital preservation, but who still want to benefit from rising financial markets. We pride ourselves on our careful, disciplined approach to managing downside risk, using our proven quantitative and derivative strategies where appropriate, while at the same time always seeking to maximise returns.

We can invest across most asset classes, including cash, fixed income, property and equities, constructing the most appropriate portfolios for a variety of risk levels. Of key importance, and of significant value to clients, is our highly active management style as we shift between asset classes to capture the best possible performance, while preserving capital. While the preservation of investment capital is high priority, we offer no guarantee against capital loss.

WHY CLIENTS CHOOSE US

- Comprehensive range of targeted, hedged and absolute return offerings.
- A team with extensive experience in derivatives trading, investment banking and asset management.
- Access to a unique, proprietary downside risk management model.
- A long-term track record of delivering absolute returns in various market cycles.
- Our fully transparent risk management strategy ensures clients' capital is secure in all market conditions.
- Peace of mind from Old Mutual's compliance and risk management support.

TEAM

Tom Connell – Boutique Head

Saul Burman – Portfolio Manager

Tassius Chigariro – Portfolio Manager

John Gilchrist – Portfolio Manager

Daniel Polakow – Derivative Specialist

Bryn Hatty – Portfolio Manager

Bivashen Naidoo – Portfolio Manager

Hanno Niehaus – Portfolio Manager

Nelisiwe Nzama – Portfolio Manager

RETAIL INVESTMENT OFFERINGS

Unit Trusts

- Old Mutual Capital Builder Fund
- Old Mutual Dynamic Floor Fund
- Four Plus Capital Fund of Funds

Life Funds

- Wealth Defender Fund
- Wealth Defender Income Fund

These funds are collective investments schemes or life funds and are accessible via Old Mutual Unit Trusts, Investment Frontiers, Galaxy and Max Investments.

Refer to the Quarterly Fund Performance Guide for further information.

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