OLD MUTUAL
Investment Group

Small Cap Portfolio

Portfolio Manager | Brian Pyle

INVESTMENT DESCRIPTION

The Small Cap Portfolio invests in listed companies falling outside of the FTSE/JSE Top 65 shares by market capitalisation. The portfolio has exposure to carefully selected, established and emerging smaller companies which show above average prospects for capital gains over the medium to longer-term. This portfolio is actively managed in accordance with the Best Investment View.

INVESTMENT OBJECTIVE

This portfolio aims to offer superior returns over the medium to longer term.

INVESTMENT COMPOSITION

The portfolio invests in quoted equities in the small companies sector, cash, derivatives and money market instruments.

SUITABLE INVESTORS

This portfolio is for investors wishing to diversify their portfolio to include a specialist, higher risk investment and who believe that smaller and emerging companies offer strong growth opportunities.

INVESTMENT TEAM

This portfolio is managed by Brian Pyle, who has full access to the depth of the research team, systems and infrastructure. Brian has eight years investment experience and has managed funds in the small cap space for six years. As Sector Head of small companies he is responsible for the management of the small cap component of the institutional funds, as well as the Small Companies unit trust. In addition he researches and analyses numerous JSE-listed companies in the mid- and small-cap arena.

The equity research team benefits from the dedicated skills of the Macro Strategy Investments Boutique and the Quantitative Research and Risk Team, who together, provide specialist input into share selection. A quantitative model is used as an objective tool, and provides added confidence to the fundamental research done.

Launch Date
May 2004

Fund Category
Specialist Domestic Equity

Product Vehicle
The client is the beneficial owner of the assets held in the portfolio.

Minimum Investment
R100 million

Benchmark
Typically FTSE/JSE Small Cap Index.

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