

Financial Portfolio

Sector Head |
Tracy Brodziak



INVESTMENT DESCRIPTION

The Financial Portfolio is a specialist equity portfolio that aims to derive significant investment returns from superior stock selection of the financial shares of the Johannesburg Stock Exchange (JSE). The portfolio seeks to produce long-term performance through achieving a balance between risk and reward. This portfolio is actively managed in accordance with the Best Investment View.

INVESTMENT OBJECTIVE

Typically the investment objective of the portfolio is to outperform the FTSE/JSE Financial Index. However, upon the clients request, a specific benchmark can be used as the internal benchmark against which the portfolio will be managed, taking into account the risk constraints and the expected performance targets.

INVESTMENT COMPOSITION

The fund will generally have exposure to equities in the Large Financial sector, cash deposits, derivatives and money market instruments.

SUITABLE INVESTORS

The fund aims to satisfy higher risk investors seeking superior returns over the medium to long term and who have a tolerance for short term fluctuations in capital value.

INVESTMENT TEAM

This portfolio is managed by Tracy Brodziak and supported by the financial sector analysts who have full access to the depth of the research team, systems and infrastructure. In addition, this team draws on the specialist skills of the Macro Strategy Investments Boutique and the Quantitative Research and Risk Team for input into share selection. Tracy holds a BBusSc Degree in Finance, is a qualified CA and CFA. She became sector head of financial services in March 2006 and is responsible for the fundamental analysis of the commercial banks.

Launch Date

January 1985

Portfolio Category

Specialist Domestic
Equity

Product Vehicle

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

Benchmark

Typically based on
FTSE/JSE Financial
Index

Minimum

Investment

R100 million

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