



OLD MUTUAL

Investment Group

Macro Strategy
Investments

Portfolio Manager |
Peter Brooke



Global Balanced Portfolio

INVESTMENT DESCRIPTION

The Global Balanced Portfolio's underlying investments comprise a balanced spread of SA and international assets. This portfolio seeks to produce long term capital growth through achieving a balance between income, capital growth, security and risk. Full discretion portfolios are managed according to the Best Investment View. The portfolio complies with Regulation 28 of the Pension Funds Act, 1956.

INVESTMENT OBJECTIVE

The Portfolio's objective is to deliver superior returns and long term capital growth, while actively minimising risk.

INVESTMENT COMPOSITION

SA Equities; SA Bonds; SA Cash; SA Listed Property; International Assets.

SUITABLE INVESTORS

The Portfolio aims to satisfy investors who seek superior returns over the medium to long term, who seek international exposure, and who have a tolerance for short term fluctuations in capital value.

INVESTMENT TEAM

The portfolio is managed by Peter Brooke, Boutique Head of Macro Strategy Investments. Peter joined Old Mutual Investment Group (previously OMAM) in May 2005. His experience as a bottom up analyst and an asset allocation portfolio manager ideally suits this role. Peter has more than 13 years industry experience. He leverages off the views of the five Macro Strategy Investments Boutique members, while the investment management of the underlying asset classes is outsourced to any of the Old Mutual Investment Group's boutiques, depending on the specific client mandate.

Launch Date

January 1993

Portfolio Category

Core Balanced

Product Vehicle

The client is the beneficial owner of the assets.

Benchmark

Dependant upon client mandate.

Minimum Investment

R100 million

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