



**OLD MUTUAL**

Investment Group

Macro Strategy  
Investments

Portfolio Manager |  
Peter Brooke



## SA Balanced Portfolio

### INVESTMENT DESCRIPTION

The SA Balanced Portfolio invests in a well diversified balance of South African assets to produce long term capital growth. This full discretion portfolio is managed according to the Best Investment View. The portfolio complies with Regulation 28 of the Pensions Fund act, 1956.

### INVESTMENT OBJECTIVE

The SA Balanced Portfolio aims to deliver consistent long term performance while actively minimising risk.

### INVESTMENT COMPOSITION

The portfolio comprises a mix of quoted SA equities, listed SA bonds, quoted SA property, SA money market instruments and derivatives.

### SUITABLE INVESTORS

This Portfolio aims to satisfy investors who seek superior returns over the medium to long term, 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 held in the portfolio.

#### Benchmark

Dependant upon client mandate.

#### Minimum Investment

R100 million

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