

Performer portfolio

Performer is a moderate-to-high risk-balanced portfolio and targets CPI inflation-beating returns over the long term. The portfolio adopts Living* Investing as a philosophy, which entails a risk-based forward-thinking investment approach, which aims to achieve client outcomes with a greater degree of certainty. The asset allocation is dynamic to allow the portfolio to participate on the upside and to protect on the downside in falling markets, which means accumulating from a higher base, thus adding value in the long term. The portfolio blends diversified strategies including alternatives, both locally and offshore, to capture different sources of returns.

37.5% Equity portfolio

The 37.5% Equity portfolio is managed within conservative investment parameters. Asset allocation is robust and modelled on risk budgeting to match client needs. Diversified strategies are blended within each asset class to meet our objective of consistently adding value over the long term through growth in capital value and income, while minimising risk and loss of capital. Assets are allocated to equities, bonds and cash, with a focus on fixed interest securities in the local component. The global component has a similar investment profile, with allocations to global equities, bonds, cash and alternative investments.

Transforming the industry

As a large and respected industry player, we believe we have a responsibility to stimulate the growth and development of up-and-coming asset managers, with particular focus on black-owned companies. Alexander Forbes Investments has developed a programme to promote a more competitive and sustainable industry by supporting up-and-coming black asset managers, and new capabilities within more established houses, to allow them to build expertise and track records. Our programme is being implemented across our portfolios, with a target allocation of up to 20% to smaller managers.

Responsible investing

Responsible investing practices are aligned with our mission: to achieve consistent and responsible investment outcomes for our clients. Annually we are assessed by the United Nations-supported Principles for Responsible Investing and **in 2017 we achieved an "A" for strategy and governance, and an "A+" for listed equity - the highest attainable rating, achieved by only 10% of the 790 asset managers reporting globally.**

The Alexander Forbes Investments' approach to responsible investing is focused on: assessing asset managers' approach to integrating environmental, social and governance considerations into their investment decisions; monitoring their commitment to active ownership, through their proxy voting and engagement activities; and encouraging them to promote the development of responsible investment practices within the industry - and disclose these activities.

In addition, Alexander Forbes Investments and the World Wide Fund for Nature have established a relationship to enhance sustainability in the investment industry. Together we developed and distributed to asset managers an environmental sustainability questionnaire. This is used in their engagement on environmental issues with investee companies.

Alexander Forbes Investments is a signatory to the United Nations-supported Principles for Responsible Investment, and endorses the Code for Responsible Investing in South Africa.

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