

# Independence that drives better outcomes

Independence is often assumed but not always assured. At Investment Solutions by Alexforbes, it's a conscious choice and a cornerstone of how we deliver value.

We operate independently across manager research, selection and portfolio construction. Our solutions are guided by investment merit, not ownership or product bias. This gives your practice and your clients the benefit of objectivity, transparency and outcomes built on sound investment principles.

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## Comprehensive investment solutions suite

We provide you with access to a broad range of investment options, whether you prefer full involvement in the investment process or opt for ready-built model portfolios and off-the-shelf solutions. Our product set includes third-party products and Investment Solutions model portfolios, leveraged through the Alexforbes platform and MANCO capabilities. This enables us to deliver flexible, cost-effective and exclusive investment opportunities, along with a world-class DFM solution tailored to your practice.

No product pushes

No in-house bias

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## Niche opportunity sets

We give you access to hedge funds, private markets and other niche strategies that are often too complex or costly to access independently. Through our strategic partnerships, scale and institutional strength, we source specialised opportunities without being tied to any provider and without platform constraints.

Exclusive strategies

No provider ties

No platform constraints

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## Succession planning

We give you peace of mind knowing that your practice will continue seamlessly when you retire or face unexpected events. Our well-capitalised balance sheet provides the financial backing for a smooth transition, ensuring continuity. Your practice remains fully independent, retaining control over your client relationships, investment decisions and the ethos that's earned your clients' trust.

Independence preserved

Legacy protected

## 4

**Buying power**

By leveraging the size and position of South Africa's largest multi-manager, we access preferential fees and advantageous fee structures. This scale translates into tangible cost savings for your clients and greater competitiveness for your practice. We use scale to reduce costs, not to profit from layers.

No double dipping

No fee layering

## 5

**Global advantage**

We give you access to exclusive global propositions through our strategic partnership with Mercer. This partnership is built on a shared multi-management philosophy and manager research approach, ensuring world-class capabilities without compromising independence. Mercer, like us, has no ties to underlying asset managers and uses a **segregated mandate** approach. We do not limit our solutions to Mercer and, where appropriate, we leverage other leading global managers to deliver the best investment outcomes.

Global access

No manager ties

Independent choices

## 6

**Manager research and selection**

We do not manage assets directly. Instead, we research the asset manager universe locally and globally, identify asset managers' core competencies and combine them into optimally blended, multi-managed solutions. We assess managers using a structured, forward-looking process that blends qualitative insight and quantitative rigour to evaluate consistency, style integrity and performance potential. We believe that thorough manager research allows us to assess the likelihood of a strategy delivering performance that optimises targeted investment outcomes. This ensures our solutions are built for the future, with portfolios that include top-rated managers selected for their ability to perform across market cycles.

Merit-based manager selection

No manager bias

Every practice is different and so are the needs of its clients. That's why we don't promote a single product or push a fixed solution. Instead, we choose what fits best. Every portfolio decision is made with one goal in mind: delivering better, more transparent and client-focused investment outcomes.

**Disclaimer**

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