



1941 - 2021

# WORLDWIDE FLEXIBLE PORTFOLIO

## PORTFOLIO FACTS



**MAIN OBJECTIVE:**

Capital growth over the long term



**BENCHMARK:**

Inflation + 6%



**INVESTMENT HORIZON:**

7 Years +



**RESTRICTIONS:**

max offshore 60%, max equity 100%



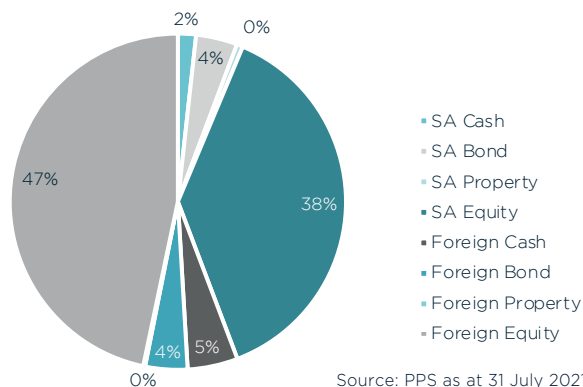
**RISK PROFILE:**

Aggressive

## PORTFOLIO INSIGHTS

This portfolio seeks to provide a return of 6% above inflation over the long-term. The portfolio can hold approximately 90% in equity, and between 30% and 60% offshore. It provides aggressive exposure to growth assets, combining both local and offshore. It is suited to investors who place an emphasis on offshore diversification and long-term capital growth. You can consider this portfolio if you have an investment horizon of at least seven years.

## ASSET ALLOCATION



## RISK METRICS

Annualised Standard Deviation	12,34%
Maximum Drawdown	-13,17%
Percentage of Positive months	61,67%

Source: PPS as at 31 July 2021

## TOP 10 HOLDINGS

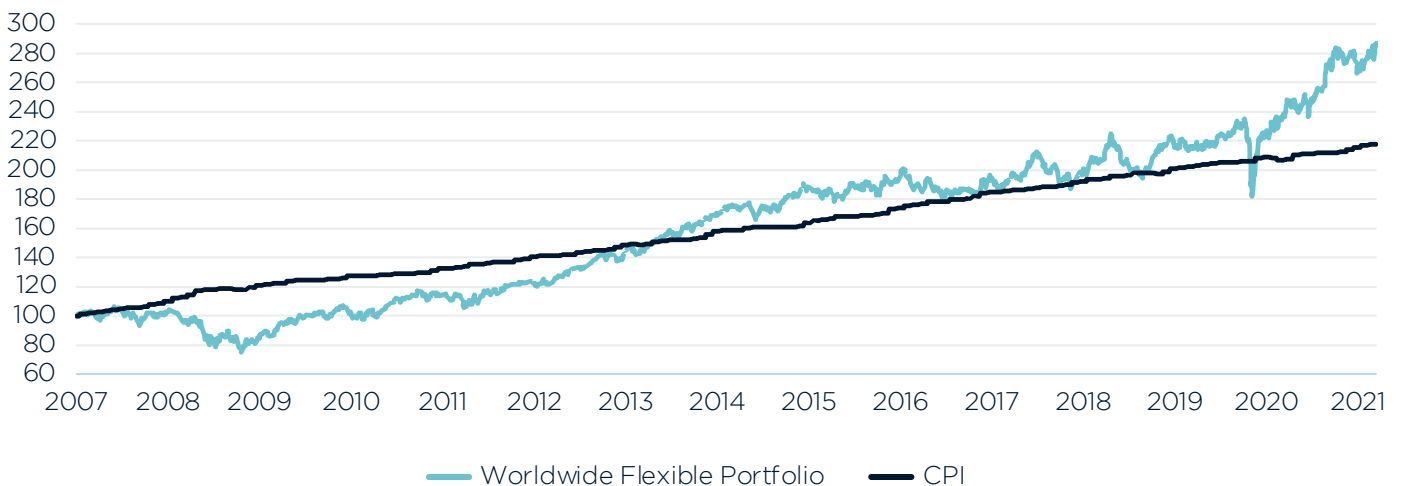
WORLDWIDE FLEXIBLE PORTFOLIO	
NASPERS	3,25%
IMPALA PLATINUM	3,01%
ANGLO AMERICAN	2,37%
SIBANYE STILLWATER LTD	1,51%
ABSA GROUP LTD	1,48%
ALPHABET INC	1,47%
AMAZON	1,38%
TESLA INC	1,32%
AFRICAN RAINBOW MINERALS	1,32%
PROSUS	1,27%

Source: PPS as at 31 July 2021

# PERFORMANCE

	YTD JULY	1 YR	2 YRS	3 YRS	5 YRS	7 YRS	10 YRS
<b>WORLDWIDE FLEXIBLE PORTFOLIO</b>	11.67%	19.60%	16.40%	12.59%	9.48%	8.21%	10.77%
	2020	2019	2018	2017	2016	2015	2014
<b>WORLDWIDE FLEXIBLE PORTFOLIO</b>	16.73%	13.62%	0.78%	8.06%	-3.02%	10.73%	9.57%

Source: PPS as at 31 July 2021



Source: PPS as at 31 July 2021

## WHY CHOOSE PPS INVESTMENTS

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We're part of PPS, a holistic financial services company specialising in bespoke financial solutions exclusively to graduate professionals. Operating under the ethos of mutuality, PPS shares 100% of its profits among its qualifying members.

When investing with us, you could get even more.

- Earn more profit-share allocation via **Linking** and the **PPS Profit-Share Cross-Holdings Booster**.
- Save on administration fees by creating a **Family Network**.

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PPS Investments is only available in South Africa.

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