



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 90%

**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.

ASSET ALLOCATION



- SA Equity - 37.1%
- SA Property - 0.5%
- SA Bonds - 3.4%
- SA Cash - 4.6%
- Global Equity - 45.1%
- Global Property - 0.1%
- Global Bonds - 3.3%
- Global Cash - 5.9%

TOP 10 HOLDINGS

NASPERS	3.65%
PROSUS	2.87%
AKZO NOBEL NV	2.25%
FIRSTRAND	1.94%
BRITISH AMERICAN TOBACCO	1.77%
ALNYLAM PHARMACEUTICALS I	1.52%
BID CORPORATION LTD	1.44%
COMPAGNIE FINANCIERE RICHMONT	1.39%
MICROSOFT CORP	1.37%
ABSA GROUP LTD	1.35%

PERFORMANCE

Trailing returns	
YTD	13.20%
1 Year	15.31%
3 Years	8.40%
5 Years	8.74%
7 Years	7.65%
10 Years	8.39%
15 Years	9.23%

Returns longer than 1 year are annualised.

Annualised returns: The weighted average compound growth rate over the performance period measured.

Source: PPS, Morningstar as at 31 July 2023.

RISK METRICS

Annualised Standard Deviation	12.88%
Maximum drawdown	-15.33%
Percentage of positives months	59.17%

WHY CHOOSE PPS INVESTMENTS

At PPS Investments, we offer a suite of flexible investment solutions for pre-retirement, post-retirement and wealth creation. We create opportunities for optimal diversification through our fund range that caters to various risk appetites and time horizons. Our offering is geared to meet the investment needs of PPS members, their family and other discerning investors, too.

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**.

*Members holding qualifying products share in the profit or loss of PPS and past performance is not necessarily indicative of future performance.

GET IN TOUCH

Speak to your PPS Investments accredited financial adviser.
Alternatively, feel free to contact us directly

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