

PPS Equity Fund



INVESTMENTS

Fund facts

- Main objective: Capital growth over the long term
- Benchmark: Capped SWIX Index
- Investment horizon: 7 years +
- ASISA Category: South African Equity General
- Restrictions: max offshore 0%, max equity 100%
- Regulation 28: Non-compliant

We blend managers with different investment styles to ensure more consistent returns over the investment horizon.

Fund insights

The PPS Equity Fund is a domestic-only fund that aims to outperform South African listed equities, as defined by the FTSE/JSE Total Return Capped SWIX Index. The fund is made up of a concentrated combination of active SA equity managers who are expected to be fully invested in SA equities at all times, while implementing their best investment view.

It's suitable for investors seeking a diversified multi-managed equity fund, either as the equity building block in a multi-asset portfolio, or as a stand-alone solution for investors with a long-term capital growth objective. The portfolio is ideal for those who wish to outperform the SA equity market by being fully invested in SA equities at all times.

Fund approach

Superior manager selection drives performance in this fund.

The fund is made up of a concentrated combination of active SA equity managers who are expected to be fully invested in SA equities at all times, while implementing their best investment view.



Investment expertise

Through our manager research, we carefully combine the selected asset managers – each with unique skills and expertise and blend these into a single fund.

We ensure that the funds stay true to their styles and continuously engage with managers to assess their processes, styles and positioning. The combination of funds and managers in the PPS Equity Fund may vary from time to time.

Please see Minimum Disclosure Document available on www.pps.co.za/invest for underlying manager allocation.

Why 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](#).

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Get in touch

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