



**Sanlam Investments**



## Satrix and Easy Equities

Democratising Investments





EasyEquities  
[www.easyequities.co.za](http://www.easyequities.co.za)

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## LAUNCHING SATRIX QUALITY SOUTH AFRICA ETF

[Find out more >](#)

### DEMOCRATISATION of INVESTING

**Fractional** Shares – No minimums  
Affordable **Online** Access – No annual platform fee  
Tax-free Saving  
Vouchers

# Award-winning partnership | [SatrixNOW.co.za](http://SatrixNOW.co.za)

Best African InvestTech and FinTech Company 2016 & 2017



# Digital and Social Media | Twitter, Instagram and Facebook



## Twitter

14 746 followers

**SATRIX Investments** @SATRIX\_SA · Sep 23  
Today is #HeritageDay. It's on this day that we're encouraged to celebrate our diversity. Share with us how you will be celebrating.



👍 2 ❤️ 6

**SATRIX Investments** @SATRIX\_SA · Jul 25  
The team behind the 3 new global #ETFs listed on the #JSE today! #Juststart



👍 4 🔄 4 ❤️ 14

## Facebook

12 998 followers



## Instagram

692 followers

**satrix\_sa**



👍 🗨️ 📌

Liked by **oncewepirates** and **6 others**

**satrix\_sa** Benefit from every bit of growth. Invest #taxfree. You can invest R33 000 per tax year or R500 000 over a lifetime.

12 APRIL



5<sup>th</sup> Edition  
on it's way!

HOME > VISIT OUR WEBSITE > EMAIL US > HOW IT WORKS > SHARE THIS ON

# OWN THE MARKET

## STAY ON TRACK!

Your no-nonsense guide to index tracking funds

### TAKE THE QUIZ!

Test your money smarts

- BALANCED FUNDS**  
Get the best of both worlds
- AWKWARD GIFTS**  
(and what you should've received instead)
- PROPERTY INVESTING**  
Like you've never seen it before
- WIN A R10000 KICKSTART!**  
Open a SatrixNOW account, and get the boost you need

ALL ABOUT INVESTING: Paper-free | Tax-free | Hassle-free

**SATRIX**  
OWN THE MARKET

# Digital and Social Media | The People's Brand | #mySATRIxstory



If your friends won't listen, we will. Tell us your Satrix investor story.

#mySATRIxstory

#mySATRIxstory

What if your story encouraged someone else to become an investor?

Tell us your Satrix story and inspire someone else to start investing.

#mySATRIxstory

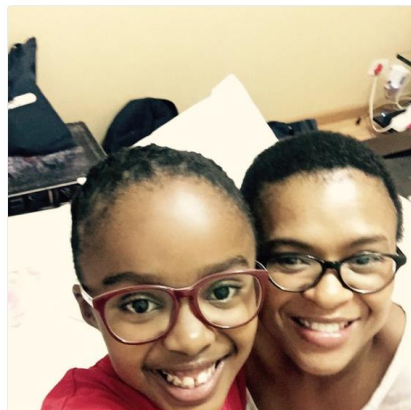


Tantaswa

@TantieFubu

Follow

My 11 year old told me this morning as we drove to school that she is interested in Satrix investing....



As a Satrix investor, you are a part of our story and our success. And as a proud member of our community we'd like to hear from you.

## what's your story?

Tell us your Satrix story and what being an investor means to you?

We're looking for a few great storytellers. These stories will be featured on Iman Rappetti's show on PowerFM during the month of September and October.

Let us know why you're investing. Which products you've chosen and why. And what this has meant to you?

We'd love to hear from you.

For more information email [mystory@satrix.co.za](mailto:mystory@satrix.co.za)

The Satrix Team

Terms and conditions apply

Simply add us to your contact list  
072 195 2538



Leave us a voicemail via WhatsApp telling us your Satrix story. Please keep it short, no more than 3 minutes and make sure you send it from a phone number where you know we can contact you.

Just start by telling us your full name and then your story.

You have until 31 August 2017

Thank you so much for sharing.

#mySATRIxstory



AFIKA

@AfikaSoyamba

Follow

Im going against all the things the society expects us to do. @EasyEquities @ETFSA @SATRIx\_SA @JSE\_Group #KayonesBday



RETWEETS  
6

LIKES  
6



# Digital and Social Media | The People of Satrix



 **SATRIX Investments** @SATRIX\_SA · Sep 29  
A happy Satrix Top 40 investor. Read why here. [ow.ly/yMPo30fk7N](https://ow.ly/yMPo30fk7N)  
#mysatrixstory #peopleofsatrix



**PEOPLE OF SATRIX**



**Clara**  
Cape Town

8 55

 **SATRIX Investments** @SATRIX\_SA · Oct 10  
Not wanting to ask her parents for money, Rosemary made a plan. Read about it here. [ow.ly/BMSt30fLBlf](https://ow.ly/BMSt30fLBlf) #peopleofsatrix #mysatrixstory



**PEOPLE OF SATRIX**



**Rosemary**  
Cape Town

1 1 4



 satrix\_sa Follow

satrix\_sa PEOPLE OF SATRIX · Onicca Meyersdal

I heard about investing with Satrix on a radio business slot and read up on electronic traded funds from magazine articles. I even went as far as reading up on their website about the different options available to a prospective investor but for some reason, I could never bring myself to commit to a plan.

It was around April 2010 when I went to the office printer to pick up some documents. Amongst the paperwork was an application form for Satrix investment. It was printed by a colleague who shortly arrived at the printing station to collect the documents. We had a long conversation about it and she made me copies of the forms. I decided to commit to the Satrix40 for

28 likes

 **SATRIX Investments** @SATRIX\_SA · Oct 3  
"If I want to make it in life, I need to start saving" [ow.ly/fErX30fB5jC](https://ow.ly/fErX30fB5jC)  
#mysatrixstory #peopleofsatrix



**PEOPLE OF SATRIX**



**Ayanda**  
Orange Farm

3 21 93

 **SATRIX Investments** @SATRIX\_SA · 7h  
Tell us your Satrix story and what being an investor means to you? Send your story to [mystory@satrix.co.za](mailto:mystory@satrix.co.za) #peopleofsatrix #mysatrixstory



If your friends won't listen, we will. Tell us your Satrix investor story.

**PEOPLE OF SATRIX**



 **SATRIX Investments** @SATRIX\_SA · Sep 27  
Meet Rishen from Jozi and find out why he is saving #mysatrixstory. [ow.ly/G1Wc30fsty](https://ow.ly/G1Wc30fsty) #thepeopleofsatrix



**PEOPLE OF SATRIX**



**Rishen**  
Johannesburg

3



# PR | Advertising Value Equivalent



Compared to an AVE of R10m in 2016

Q1  
R12.9 million

Q2  
R12.8 million

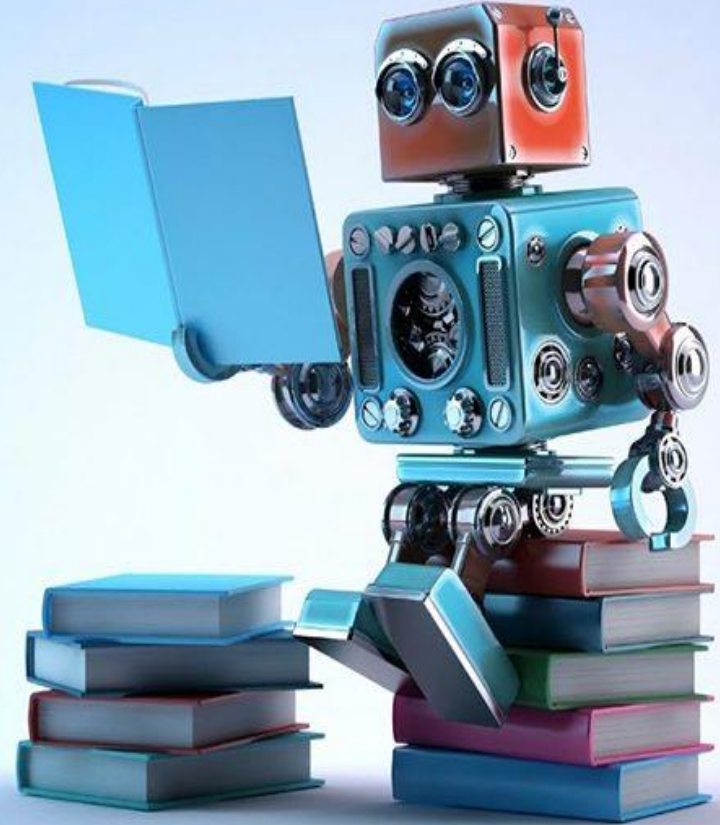
Q3  
R21 million

**TOTAL R46.7 MILLION**



## Sanlam Global Investment Solutions

Artificial Intelligence





## ➤ >US\$120M invested in AI Solutions



## ➤ Utilises Artificial Intelligence and Machine Learning

- eliminates human error and emotions
- actively adapts to changing markets

- 1) Minimize Breadth & Depth of Drawdowns
- 2) Improve Risk/Returns
- 3) Maximize Outcomes

# Multiple AI & ML Technologies



- ⊗ Artificial Intelligence (AI)= uses computers to generate knowledge from data
- ⊗ Machine Learning (ML) = algorithms to identify and act on patterns in data

**Self Learning**

autonomously from data  
(not pre-programmed)

**Adaptive**

dynamically  
as markets change

**Predictive**

asset prices  
& portfolio risk

**Minimizes True Risk**

portfolio capital loss  
dynamically

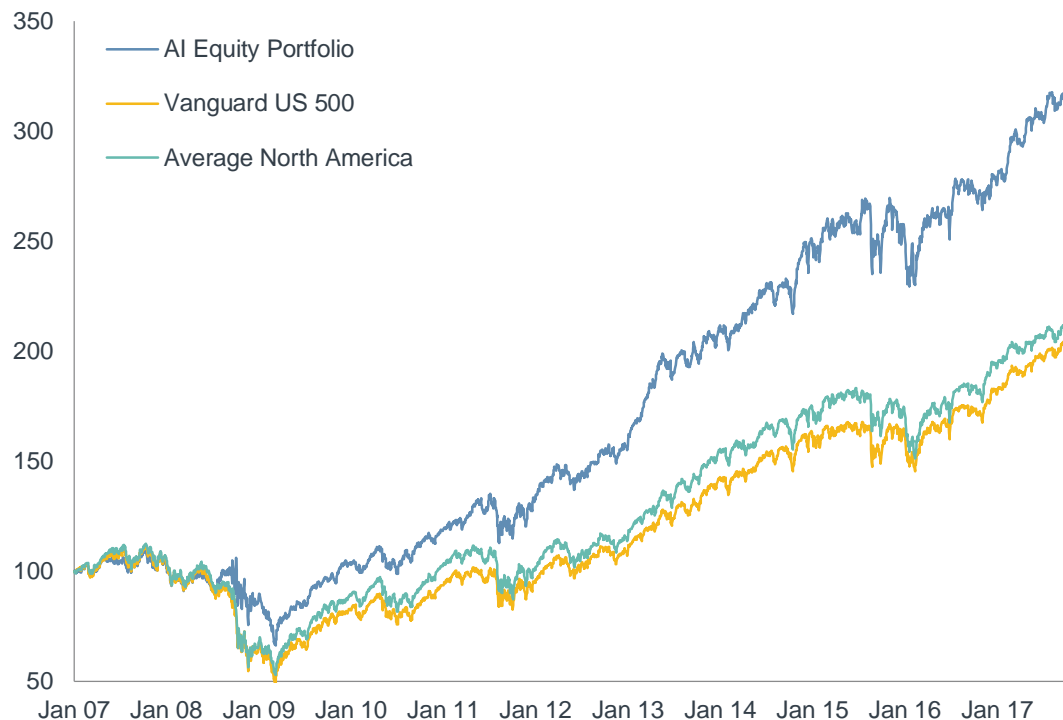
**Versatile**

any type of portfolio  
or strategy

**Scalable**

across '000s of portfolios  
or strategies

# AI Equity Portfolio Long Term vs. North American Active & Passive Funds



Data to Sep 30, 2017	AI Equity	Average NA Active*	Average NA Passive*
YTD	15.26%	11.32%	13.65%
1 Year Return	16.27%	16.33%	17.78%
3 Years Ann' Return	11.67%	9.02%	10.05%
5 Years Ann' Return	15.74%	13.32%	13.36%
Total Ann' Return	11.33%	7.32%	6.89%
Total Return	217.62%	113.97%	104.97%
Volatility	18.41%	15.74%	20.09%
<b>Sharpe (0%)</b>	<b>0.62</b>	<b>0.46</b>	<b>0.34</b>
Sortino	0.98	0.73	0.52
<b>Max Drawdown</b>	<b>-39.52%</b>	<b>-53.08%</b>	<b>-55.73%</b>

\* Performance data shown is for the average of all North American Active / Passive Equity Funds available on the Sanlam Global Investment Plan. Performance simulation from Jan 1 2007 – March 13 2017, then live data



## Sanlam Africa Investments

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Awareness Campaign





## WHAT WE DID

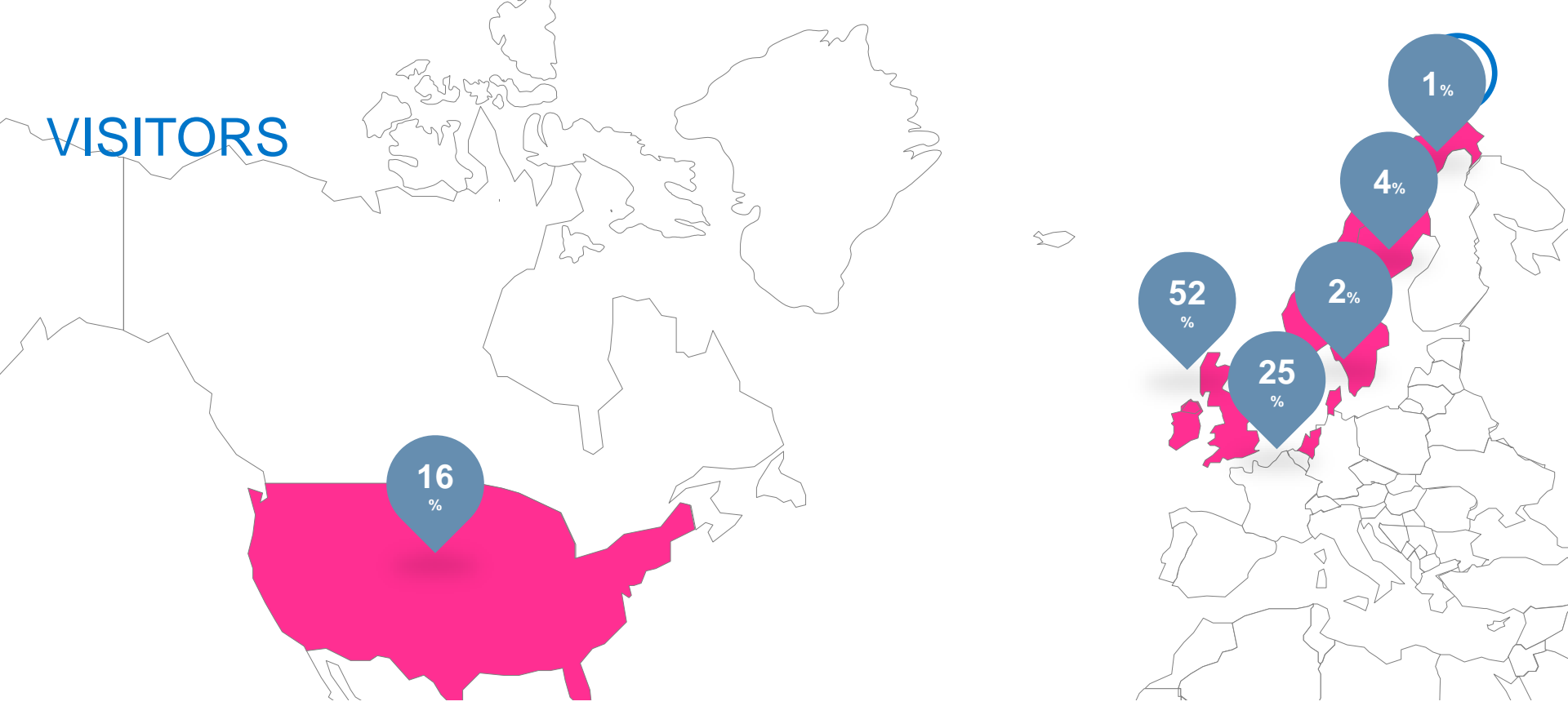
### **DATA MATCH INSTITUTIONS AND FAMILY OFFICES IN SIX COUNTRIES**

- ① **SURROUND THEIR INTERNET WITH SANLAM NARRATIVE**
- ① **DRIVE AWARENESS OF SANLAM AFRICA INVESTMENT OFFERING**
- ① **ONLY DO THIS IN US, UK, SW, NL, NO, DE**

### **PERFORM A HIGHLY TARGET KEYWORD INTEREST CAMPAIGN**

### **GENERATE LEADS INTO THE ORGANISATION THROUGH THE CREATED AWARENESS**

# VISITORS



	UK	US	NL	SW	DE	NO
BEFORE CAMPAIGN	57	32	0	6	0	0
DURING CAMPAIGN	40 019	12 564	19 138	3 248	1 365	736



thank you 