### Sanlam Investment Management

# ACTIVE INCOME FUND

### **STRATEGY**

- This multi-asset income fund seeks returns through tactical asset allocation and high conviction bets across the income-yielding universe, including: corporate and government bonds, money market instruments, preference shares and listed property.
- Opportunities are taken across the entire duration and credit spectrum.
- The portfolio manager only takes on carefully considered risk when the return potential looks attractive.

# WHY SHOULD YOU INVEST IN THIS ACTIVE INCOME STRATEGY?



OFFERS **PROTECTION** IN VOLATILE MARKETS.



**OFFERS STABILITY** – ENABLING REGULAR INCOME WITHDRAWAL.





#### PORTFOLIO MANAGER

MELVILLE DU PLESSIS FIXED INTEREST PORTFOLIOS Experience: 15 years MSc (Finance), FRM CFA, CAIA

#### THE TEAM

Investment decisions are made by leveraging off the entire Fixed Interest team's capabilities and skill set, in addition to the broader active management investment team. The portfolio manager is supported by the comprehensive credit capabilities of the Sanlam Group, and dealing desk team.



PROVIDE A
HIGH LEVEL
OF INCOME

MAXIMISE RETURNS

In a volatile times, this strategy offers investors a consistent income.

# WHO SHOULD INVEST?

- Investors looking to protect their capital.
- Investors aiming to get a higher return than from a money market fund.
- Investors looking to invest for a time horizon of 1 to 2 years.
- Investors who are drawing a regular income and require a stable fund.

## 5 KEY BENEFITS

OF INVESTING IN THIS STRATEGY BASED ON PAST PERFORMANCE.

- DIVERSIFIED INCOME STRATEGY.
- STABLE, HIGH INCOME STRATEGY.
- HIGH RISK-ADJUSTED RETURNS.
- **→** COMPETITIVE MANAGEMENT FEE.
- → THIS STRATEGY CAN BE ACCESSED AS A TAX FREE INVESTMENT.

Investments

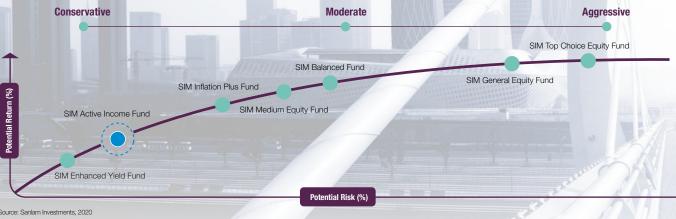
### **SIM Active Income Fund**

**Fund Category:** SA Multi Asset Income Investable Assets: Local: Cash, Bonds, Property. Max 10% Equities **Inception Date:** 03-Nov-06 **Risk Profile:** Conservative Benchmark: STeFI + 1% p.a

Despite the fact that this strategy can per mandate invest 30% offshore, this is currently not being implemented and it is unlikely that an allocation will be made to offshore in the foreseeable future. This strategy is Regulation 28 compliant.

### **Active Management**

**Core Fund Range Potential Risk/Return (%)** 



### lam Investments awards

Our business is built on a legacy of trust, which is why at Sanlam Investments we're driven to deliver results

> Raging Bull Award Certificate Lipper Award (UK) 2013 cea Yield Fund ex Top Private Banks and A Fund (USD) Investment Week Wealth Manager Survey Sanlam Private Wealth (Top

Financials), Kokkie Kooyman 2013

estment Week Fund Manager of the Yea itegory: Strategic Bond, Fund: Sanlam Str

Morningstar

ent Small Cap Fund

African FinTech Awards SatrixNow and EasyEquities

2016

Saniam Investment Management Enhanced Yield Fund Saniam Global Property Fund Raging Bull Award Saniam Michi Managed Conservative Fund of Funds FE Alpha Manager awards Salam Global High Quality Fund PAM awards

PAM awards
Investment performance: High Growth Portfolios'

SALTA Awards

Satrix RESI ETF (Best Trading Efficiency) Satrix RESI ETF (Best Total Return) SRP Africa Awards

2012

Raging Bull Award Morning Star Award

Investment Week
Fund Manager of the Year (Category:
Financials), Kokkie Kooyman

2014 Raging Bull Award Certificate

HedgeNews Africa Awards

Wealth Manager)

2015

Sanlam Investment Management Industrial Fund Sanlam Global Balanced Fund of Funds Sanlam Global Cautious Fund of Funds

**ABSIP Financial Services Sector Awards** 

Raging Bull Award Certificate

African FinTech Awards SatrixNow and EasyEquities Imbasa Yegolide Award Equities Manager of the Year Intellidex Top Private Banks and Wealth Manager Survey Sanlam Private Wealth (Top Wealth Manager)

Thomson Reuters Lipper Awards

Private Asset Managers(PAM) Awards

Financial Express Awards Sanlam Strategic Bond Fund:Best Fund Investors Choice Awards Sanlam Global High Quality Fund City of London Wealth Management Awards Sanlam Global High Quality Fund

Investment Week Fund Manager of the Year
(Category: Absolute Return-Multi Asset, Fund

Raging Bull Award Certificate tment Management Enhanced Yield Fund

Fund Manager of the Year Awards Wealth Briefing European Awards

SALTA Awards Satrix RESI ETF Satrix FINI ETF

SALTA Awards

Satrix 40 ETF (People's Choice) Satrix INDI ETF (Best Total Return Performance) Satrix RESI ETF (Best Total Return Performance)
Satrix RESI ETF (Best Trading Efficiency)
Satrix 40 ETF (Best Capital Raising) Satrix Managers (Best ETF Issuer for Capital Raising)

Sanlam Investments consists of the following authorised Financial Services Providers: Sanlam Investment Management (Pty) Ltd ("SIM"), Sanlam Multi Manager International (Pty) Ltd ("SMMI"), Satrix Managers (RF) (Pty) Ltd, Graviton Wealth Management (Pty) Ltd ("GWM"), Graviton Financial Partners (Pty) Ltd ("GFP"), Satrix Investments (Pty) Ltd, Amplify Investment Partners (Pty) Ltd, Sanlam Capital Markets (Pty) Ltd ("SCM"), Sanlam Private Wealth (Pty) Ltd ("SPW"), Sanlam Credit Fund Advisor Proprietary Limited, Sanlam Africa Real Estate Advisor Proprietary Limited and Sanlam Employee Benefits ("SEB"), a division of Sanlam Life Insurance Limited and Simeka Wealth (Pty) Ltd; and has the following approved Management Companies under the Collective Investment Schemes Control Act: Sanlam Collective Investments (RF) (Pty) Ltd ("Satrix"). Sanlam Collective Investments (RF) (Pty) Ltd is a registered and approved Manager in terms of the Collective Investment Schemes Control Act. A schedule of fees can be obtained from the Manager. This is a multi-asset, income fund. The Retail class is the most expensive class offered by the Manager. Maximum Fund charges include (incl. VAT): Initial advice fee (MAX), 1.15%. Initial manager fee, N/A. Annual advice fee (MAX), 1.15%. Annual manager fee, 0.92%. Total expense ratio (TER), 0.93%. For more information visit www.sanlaminvestments.com. The fund is exposed to equities, which means prices will go up and down. SIM stands for Sanlam Investment Management. Full details on the basis of the award is available from the Manager. Please refer to the fund's Minimum Disclosure Document (MDD) to view more information.