

ACTIVE INCOME FUND



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.

STRATEGY

- 1 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.
- 2 Opportunities are taken across the entire duration and credit spectrum.
- 3 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.



STRATEGY AIM

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.**

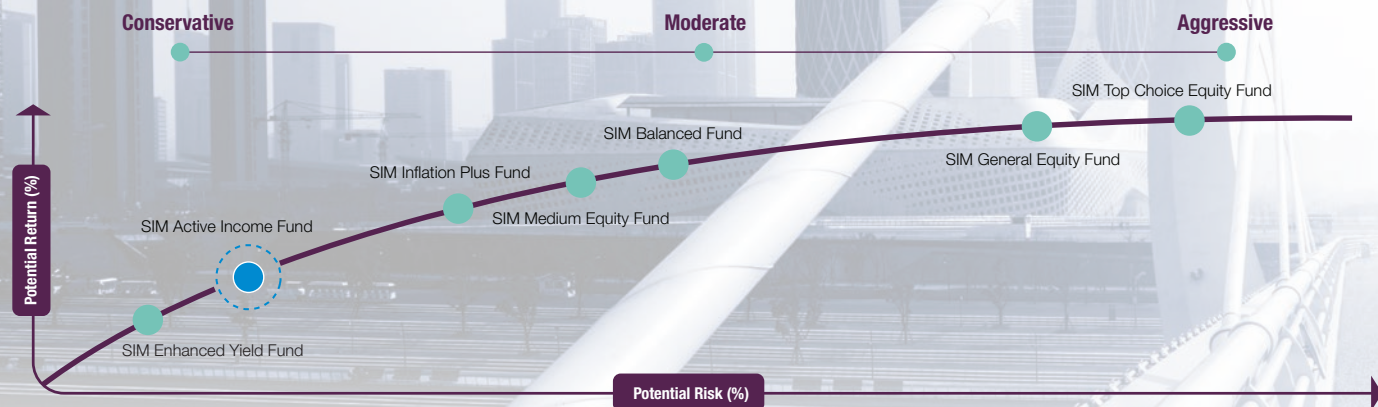
SIM Active Income Fund

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.

Source: Sanlam Investments, 2020

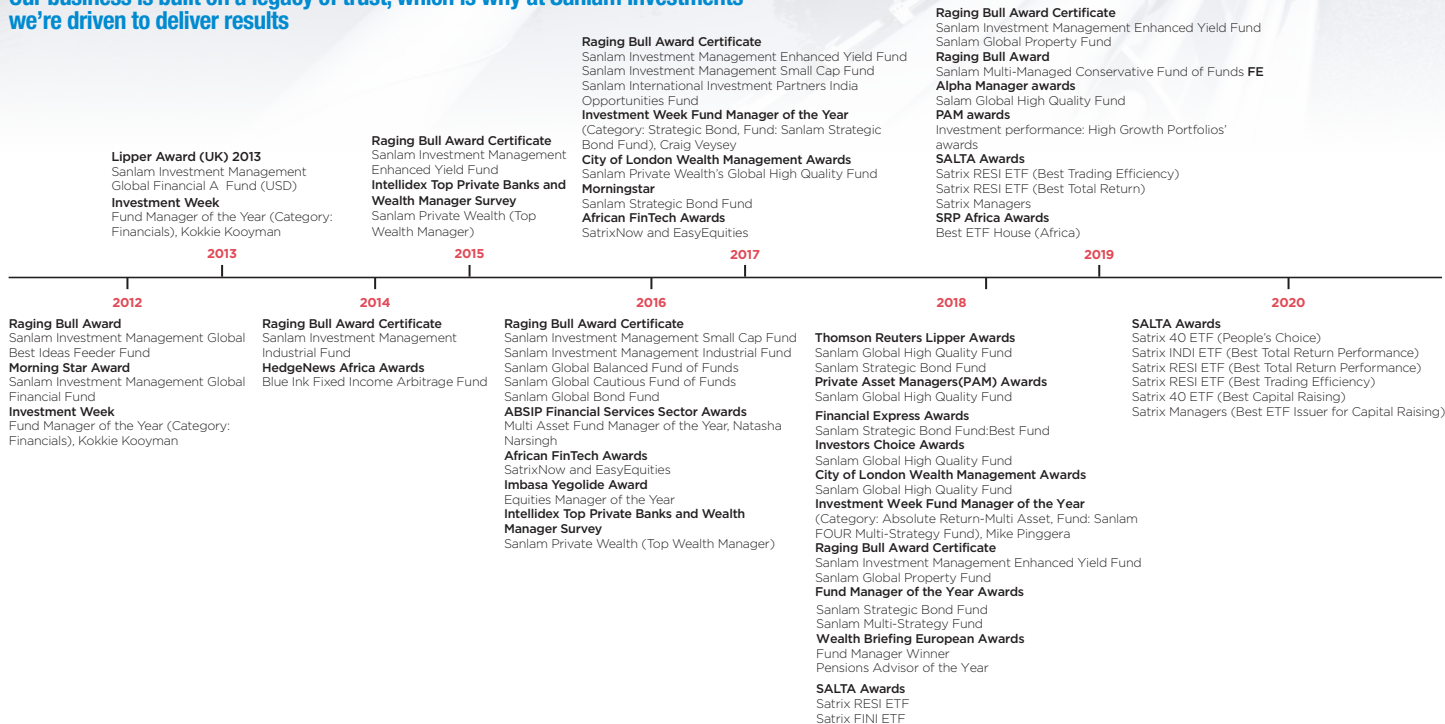
Active Management Core Fund Range Potential Risk/Return (%)



Source: Sanlam Investments, 2020

Sanlam Investments awards

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



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