



Discretionary Cryptocurrency Investment



PORTFOLIO MANAGER Annatjie van Rooyen, BCom (Hons), Membership exams of SA Institute of Stockbrokers and Safex. Annatjie has more than 20 years investment experience and was previously a director of Standard Equities and Head of Dealing at BoE Stockbrokers. Annatjie also managed the BoE Alpha Fund, a long/short equity fund that was nominated in 2007 in the category of Top New Funds. Annatjie is currently the CEO of MyWealth Investments.

TRADING STRATEGY

The portfolio manager takes speculative positions in Crypto Currencies based on the assessment of market conditions and other factors. Portfolios are managed on an aggressive basis following momentum strategies based on trending markets.

INVESTMENT OBJECTIVE

The portfolio manager seeks to benefit from growth opportunities as and when crypto currencies become tradeable, while also seeking to limit downside risk to general price declines and extreme volatility. Although the returns are dependent on general market movements, the technical analysis competence of the portfolio manager also attributes significantly to the overall portfolio performance.

INVESTMENT ASSETS

The portfolio manager can structure the cryptocurrency portfolio to include a range of cryptocurrencies, based on the sole discretion of the portfolio manager.

PORTFOLIO STRUCTURE

Each client's investment is valued on a daily basis and all transactions are verified by our Financial Director, Roeleen van den Heever CA(SA). The funds are invested on crypto exchanges which offer security and liquidity.

RISK MANAGEMENT

Volatility monitoring models reflect favourable trading conditions and liquidity risk is monitored on an ongoing basis.

WHO SHOULD INVEST?

Sophisticated investors who wish to take an aggressive approach to investing and are aiming for above average returns subject to higher risk and volatility. As with any other asset class, investors should also use these investments as one of many building blocks in a diversified portfolio. This investment should not represent more than 2% – 5% of the total investment of the client. A minimum investment of R100 000 is required to invest in this product.

DISCLOSURES

- MyWealth Investments has been approved in March 2024 by the Financial Sector Conduct Authority to add cryptocurrencies as a product to our CATII licence.
- A performance fee of 20% above the high watermark applies to the portfolio.
- Investment in Cryptocurrency is a high-risk capital investment.
- The information provided in this document with regards to the above MyWealth Investments strategy is generic and not personalised to the needs of any person, persons or entity.
- Information provided in this document is for information purposes only and does not constitute the provision of advice.
- It is the responsibility of any person, persons or entity in possession of this document and wishing to invest in Cryptocurrency to observe all applicable laws, regulations, legal requirements, and tax consequences applicable to the acquisition, holding and disposal of Cryptocurrency as well as foreign exchange restrictions that may be applicable to the investment.

MONTHLY PERFORMANCE OF CRYPTO CURRENCY BASKET BEFORE FEES:

Warning: Past performance is not an indication of future performance.

YEAR	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD
2021	-	7.00%	4.88%	2.58%	0.00%	-4.21%	4.03%	13.66%	-0.12%	8.69 %	2.36 %	-7.00%	31.87 %
2022	-28.01%	13.07%	2.68%	-11.32%	-24.82%	-34.69%	28.63%	-10.28%	4.97 %	9.49 %	-10.97%	-7.22%	-68.47 %
2023	35.08%	7.44%	18.57%	6.95%	-0.92%	2.77%	-2.36%	-4.93%	2.44%	17.11%	7.69%	12.55%	102.39 %
2024	-1.68%	44.90%	12.48%	-13.59%	8.53%	-13.59%	6.52%	-18.22%	7.79%	12.13%	44.54%		89.81 %

DISCLAIMER

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