



MyWealth

Investments - Offshore Equity

MyWealth Investments

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TRADING STRATEGY

The investor takes long positions in the best opportunities in global equity markets and actively seeks out attractively valued shares to maximise long-term growth.

INVESTMENT OBJECTIVE

The investor should seek to outperform the CPI with 3%, while also seeking to limit downside risk to general stock market declines. Although the returns are dependent on general market movements, stock-picking skills of the investor also attributes significantly to the overall portfolio performance.

RISK MANAGEMENT

Investors should only invest in shares viewed as being attractively valued and which may offer superior long-term investment growth. The investor should have a disciplined approach to reducing risk, shares can be volatile investments and there is a meaningful risk of capital loss over the short term. Global currency movements may also impact investment gains or declines.

WHO SHOULD INVEST?

Investors who are comfortable seeking moderate to high risk tolerance, long-term capital appreciation and income by investing in a diversified mix of global equities. Typically have an investment horizon of more than three years and are comfortable with stock market fluctuation, i.e. short- to medium-term volatility.

KEY FACTS

Risk Profile: Moderate to High Risk:

Benchmark: CPI +3%

Prime Broker: Peresec South Africa

Minimum Investments:

R500 000 (Asset Swap)

Brokerage: 40 bps per trade

PI Cover: R1 Million

MONTHLY PERFORMANCE OF EXISTING NON-DISCRETIONARY OFFSHORE PORTFOLIOS.

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

YEAR	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD	S&P500
2025	39%	3.48%	-7.16%										35.32%	-4.59%
2026														
2027														
2028														
2029														

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