PRIVATE CLIENT ASSET MANAGEMENT

NURTURING WEALTH

PRIVATE CLIENT ASSET MANAGEMENT IS AN AUTHORISED FINANCIAL SERVICES PROVIDER (LICENCE #39978)

PRIVATE CLIENT
ASSET MANAGEMENT

"Your portfolio is uniquely designed to preserve your capital and generate long-term wealth."

NURTURING WEALTH

Our Leadership Team

Grant Alexander
Chief Investment Officer
Director Private Client Holdings

B.Com Hons (FAPM) (Tax) CA(SA) LLM

A Chartered Accountant with an Honours degree in Taxation and a Masters degree in Commercial Law, Grant has investment qualifications from the Securities Institute (London) and a B.Com Honours degree in Financial Analysis and Portfolio Management from the Graduate School of Business.

He is responsible for Asset Management and is the Chairman of our Investment Committee. With over three decades of active involvement in financial services and investments, Grant has a wealth of experience in all areas of portfolio management, tax and estate planning.

Leith Wimble, CFA®
Portfolio Manager

B. Bus Sc Finance, B.Com Hons Economics, M.Com Tax CA(SA), CFA® charterholder, CFA Institute.

Leith has more than 15 years' experience working in the investment management industry. He initially joined the UBS European Equity Research Team in London before furthering his sell-side career in Cape Town. Leith later joined an institutional asset manager as a buy-side investment analyst with a focus on South African equities, whereafter he progressed to become a fund manager.

Leith is responsible for portfolio management, international equity research, valuations, and investment process management and development.

INVESTMENT COMMITTEE

(From left to right)
Grant Alexander CA(SA) LLM (Chairman), Warren Buys CFA® CFP®, Mark MacSymon CFP®, Andrew Ratcliffe CFP®, Leith Wimble, CA(SA), CFA®

PRIVATECLIENT
ASSET MANAGEMENT

Our Investment Philosophy

OUR INVESTMENT PHILOSOPHY IS "MINDFUL OF THE PEOPLE WE SERVE AND IS GROUNDED IN INDEPENDENT, RATIONAL THINKING, IN DIVERSIFICATION AND IN LONG-TERM VALUE CREATION."

Our investment team's collective talent is harnessed to build portfolios that will preserve your capital and grow your wealth.
This philosophy flows through everything we do at Private Client Asset Management and is the foundation from which we build our investment principles and processes. This philosophy guides our investment decision-making and results in more consistent outcomes over time.

CORE PRINCIPLES

CLIENTS FIRST
We act in the best interests, and to the benefit of our clients at all times.

INDEPENDENT RATIONAL THINKING
We are mindful of the dynamics of FEAR and GREED.

DIVERSIFICATION
A crucial part of risk management, so as to avoid permanent loss of capital.

CREATING VALUE OVER THE LONG TERM
"…time in the market, not timing the market…"

OUR CORE PRINCIPLES

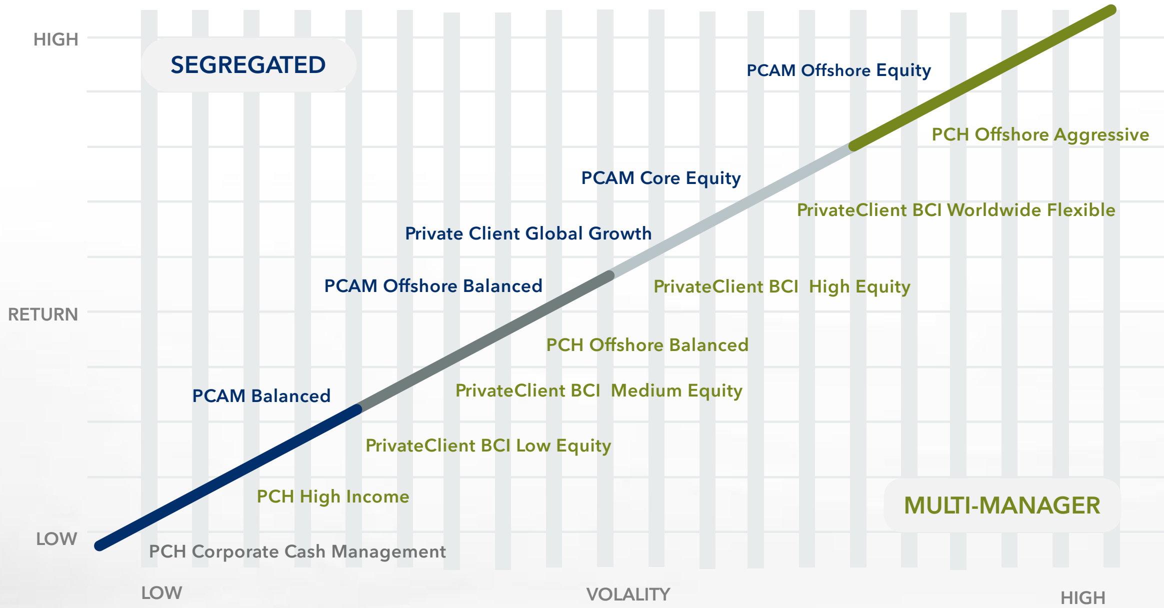
Our PCAM Investment Universe

OUR PORTFOLIOS ARE UNIQUELY DESIGNED TO PRESERVE YOUR CAPITAL AND GENERATE LONG-TERM WEALTH.

Our portfolios are designed to nurture your family wealth over the long term. Our investment process is guided by the collective decisions of an Investment Committee, led by Grant Alexander as Chief Investment Officer.

Independence is a fundamental component of this process – we are an independent, director-owned and managed organisation. Our investment choices, the strategies we implement, and our day-to-day management are not influenced by a parent institution

PCAM INVESTMENT UNIVERSE



PRIVATECLIENT
ASSET MANAGEMENT

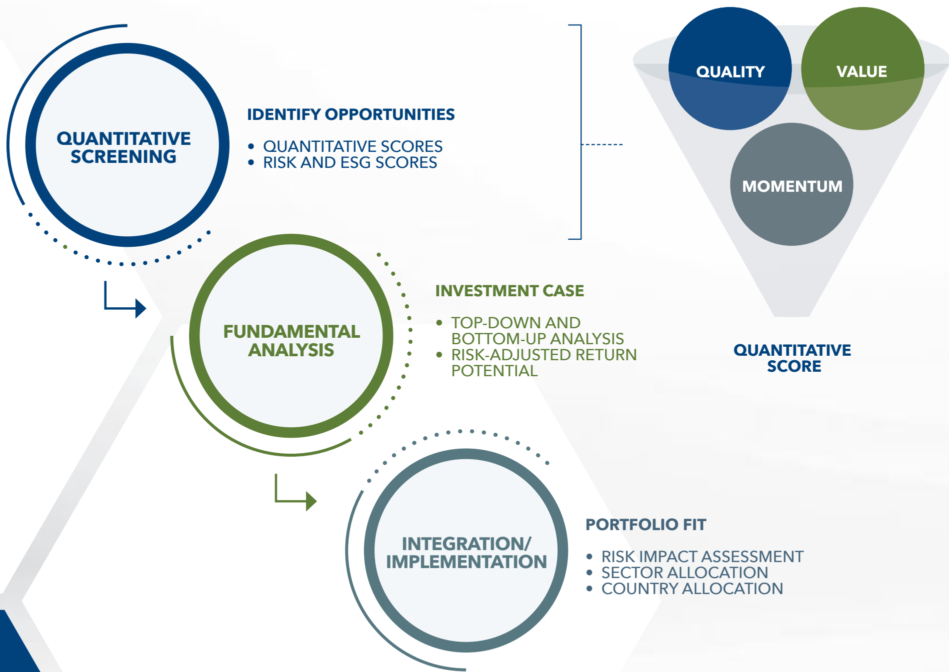
Our Equity Selection Process

WE BUY QUALITY BUSINESSES AT REASONABLE PRICES.

The first step in our investment process is to identify quality companies that are not in financial distress and that trade at attractive valuations – not an easy challenge since businesses with these high-quality attributes and strong earnings power typically trade at premium valuations.

The second step involves fundamental bottom-up and top-down quantitative and qualitative analysis to establish an investment case for those companies. Companies are selected based on their potential for risk-adjusted returns and portfolio diversification.

EQUITY SELECTION PROCESS



Our Segregated Portfolio Offering

PROFESSIONALLY MANAGED PORTFOLIOS. INDIVIDUAL ATTENTION.

Our specialised segregated portfolio offering provides direct access to the investment expertise of a single manager. We offer a range of local and offshore portfolios which are invested in listed securities, including companies listed both locally and abroad, as well as listed property and exchange traded funds.

Each portfolio is designed to meet specific needs and to assist clients in achieving their financial goals. We have an enviable track record of consistently generating robust investment performance outcomes for our clients.

FOCUSED PORTFOLIO OFFERING

PRIVATECLIENT ASSET MANAGEMENT

Our Multi-Manager and CIS Solutions

COMBINING BEST OF BREED LOCALLY AND OFFSHORE.

Our multi-manager solutions are underpinned by our ongoing investment process, and we work on both micro and macro levels. We combine the views of leading independent investment houses with our own in-house research on global markets and economic matters. From there, we develop a PCAM House View that feeds into our asset allocation and our decisions on portfolio construction and manager selection.

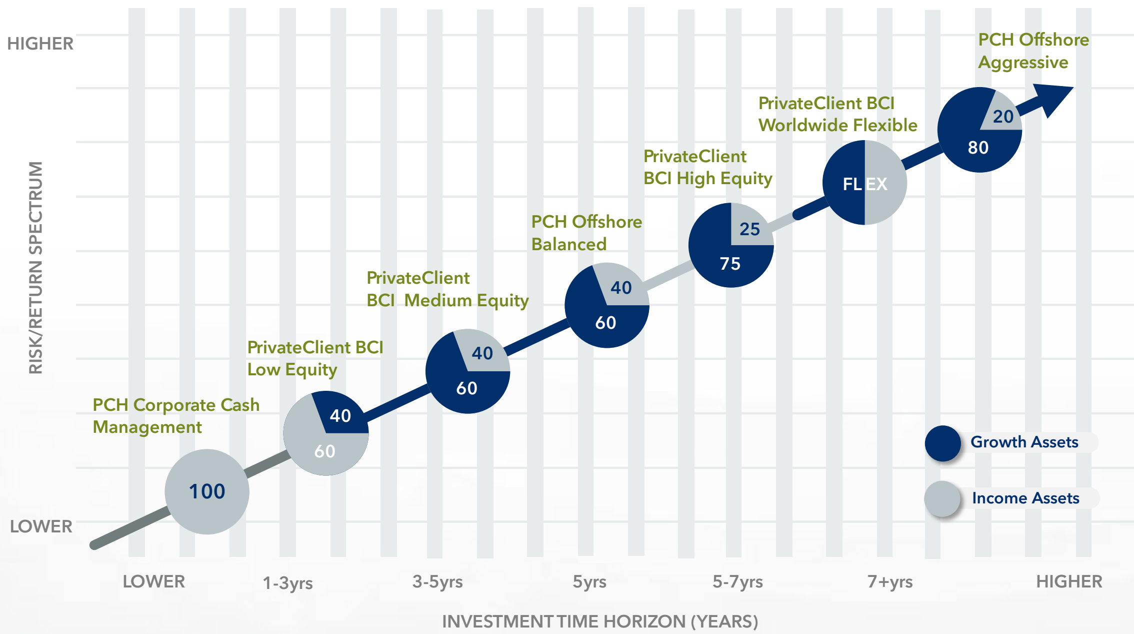
OUR MULTI-MANAGER INVESTMENT PROCESS

Our PCAM Multi-Manager House View

A HALLMARK OF OUR SUCCESS ARE THE MULTI-MANAGER SOLUTIONS WE HAVE RUN SINCE 2003.

In 2016 we integrated our multi-manager solutions into a range of risk-profiled Collective Investment Schemes (CIS). The different skills and investment styles of our managers are blended to reduce volatility and outperform over the long term, using a combination of best-of-breed local and global unit trusts.

OUR MULTI-MANAGER SOLUTIONS



DISCLOSURE:
Collective Investment Schemes in securities are generally medium-to long-term investments. The value of participatory interests may go up or down and past performance is not necessarily an indication of future performance. The Manager does not guarantee the capital or the return on a portfolio. Collective Investments are traded at ruling prices and can engage in borrowing and scrip lending. A schedule of fees, charges and maximum commissions is available on request. Boutique Collective Investments (RF) (Pty) Ltd retains full legal responsibility for the third party named portfolio.

"Our investment philosophy is mindful of the people we serve and is grounded in independent rational thinking, diversification and long-term value creation."

PRIVATECLIENT
ASSET MANAGEMENT

Professionally managed portfolios.
Individual attention.

NURTURING WEALTH

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Private Client Holdings