

Winning with strategy:

Resilient portfolios for investor success



Xoli Madikizela
Technical Investment
Specialist



In the world of sports and investments, success is often built on the same foundational principles: resilience, strategy and unwavering commitment. As the Springboks celebrate their recent triumph and Eben Etzebeth's milestone of 128 caps, investors seek investment solutions that demonstrate durability and adaptability in ever-changing market conditions. In both fields, the ability to anticipate and adapt to challenges is crucial. Just as the Springboks meticulously plan their game strategies, we at Alexforbes meticulously craft investment strategies that are resilient and responsive to market dynamics. Our multi-management approach ensures that we leverage diverse expertise and perspectives, much like a well-coordinated team on the field.

Parallels to multi-management



Resilience and adaptability

Just as the Springboks have evolved their strategies to overcome formidable opponents, our multi-management approach is designed to adapt to different market cycles. We carefully select and combine a diversified group of managers, ensuring that our portfolios are resilient in the face of volatility.





Conviction in strategy amid criticism

Rassie Erasmus's decision to back Manie Libbok as starting fly-half, despite public criticism following the Springboks' loss to Argentina a week ago, reflects a firm belief in a long-term vision. In multi-management, we often face periods where certain managers or asset classes underperform in the short term. However, we maintain conviction in our selection process and portfolio construction, knowing that these strategies are built for long-term success. This approach ensures that we don't react hastily to short-term noise, but instead remain focused on each allocation's performance expectations and long-term delivery.



Long-term performance and consistency

Etzebeth's 128 caps represent consistency and excellence over time. Similarly, our goal is to deliver sustained performance through rigorous manager selection and continuous portfolio review, ensuring that we meet our clients' objectives over the long term.



Teamwork and collaboration

Success on the rugby field is a result of collaboration and understanding each player's strengths. In multi-management, we apply this philosophy by blending investment managers with complementary strengths, delivering a cohesive portfolio that performs across various conditions.

Our multi-management value proposition



Diversification for stability

By incorporating a range of asset classes and investment styles, we create a balanced portfolio that minimises risk and maximises opportunities for growth, much like a team drawing on different players' strengths to achieve a common goal.



Proven track record

Just as Etzebeth's journey has been marked by his strategic plays and on-field decisions, our investment philosophy is grounded in rigorous due diligence and performance monitoring to ensure we stay ahead in an ever-evolving market landscape.



Conviction in manager selection

Just as Rassie backed his player, we trust our selection process. Even in challenging periods, we stay committed to our chosen investment managers, knowing that short-term underperformance can often be part of a longer-term winning strategy.



Commitment to your goals

The Springboks' relentless pursuit of excellence mirrors our commitment to delivering value to our institutional clients. With our focus on risk-adjusted returns and long-term success, we ensure that your investment objectives remain at the forefront of our strategy.





Conclusion

At Alexforbes, we understand that your investments require a strategic approach, resilience and unwavering commitment to achieve success. By drawing parallels between the Springboks' triumphs and our multi-management investment strategies, we highlight the importance of adaptability, conviction and collaboration. Our dedication to these principles ensures that we deliver consistent, long-term performance for our clients, helping them achieve their financial goals in an ever-changing market landscape.



Connect with us

Unlock the potential of personalised investment solutions. Reach out to your Alexforbes consultant today or email us at AFInvestmentsClientServices@alexforbes.com to explore how our multi-managed strategies can work for you.



Disclaimer

Alexander Forbes Investments Limited is a licensed financial services provider, in terms of section 8 of the Financial Advisory and Intermediary Services Act 37 of 2002, as amended, FAIS licence number 711 and is a registered insurer licensed to conduct life insurance business. This information is not advice, as defined and contemplated in the Financial Advisory and Intermediary Services Act 37 of 2002, as amended. The value of a portfolio can go down, as well as up, as a result of changes in the value of the underlying investments, or of currency movement. An investor may not recoup the full amount invested. All policies issued or underwritten by us are linked policies under which no guarantees are issued. The policy benefits are determined solely on the value of the assets, or categories of assets, to which the policies are linked. Past performance is not necessarily an indication of future performance. Forecasts and examples are for illustrative purposes only and are not guaranteed to occur. Any projections contained in the information are estimates only. Such projections are subject to market influences and contingent upon matters outside our control, so may not be realised in the future. **Company registration number:** 1997/000595/06 **Pension Fund Administrator number:** 24/217. **Insurer number:** 10/10/1/155. **Postal address:** PO Box 786055, Sandton 2146. **Physical address:** 115 West Street, Sandown 2196. **Telephone number:** +27 (0) 11 505 6000. The complaints handling procedure and conflict of interest management policy can be found on our website: www.alexforbes.com



alexforbes.com

alexforbes

insight • advice • impact