

The SFP investment committee decided to make no changes at the last investment committee meeting as there were no material factors to alter manager selection or asset allocation. Portfolios thus remain more neutral due to current markets.

Succession Financial Planning Wrap Fund Range						
Style/Factor	Fund	Income Plus	Stable	Stable Growth	Balanced	Capital Growth
Income (MA) Core Capital Protector	CORONATION STRAT INCOME - P	25%				
Income (MA) Yield Growth Seeker	PRESCIENT INCOME PROVIDER - A2	20%	10%	15%		
Income (MA) Short duration Capital Protector	SIM ACTIVE INCOME - B4	15%				
Money Market Core Cash returns	CORONATION MM - P (PARK)	5%	5%			
Income (MA) Yield Growth Seeker	SIM ENHANCED YIELD - B1	13%				
Income (MA) Macro Growth Seeker	SANLAM SELECT STRATEGIC INCOME-B3	10%				
Income (MA) Yield Diversified alpha	NEDGROUP FLEXIBLE INCOME - B1	12%				
Low Equity (MA) GARP Growth Seeker	CORONATION BAL DEFENSIVE - P		15%			
Low Equity (MA) Value Capital Protector	SIM INFLATION PLUS - B4		17%	12%	12%	
Low Equity (MA) Quantitative Passive	SATRIX LOW EQ BALANCED INDEX-B1		18%			
Low Equity (MA) Multi-Style Diversified	SANLAM SELECT DEF BALANCED - B3		16%			
Low Equity (MA) Value (QARP) Growth Seeker	PRUDENTIAL INFLATION PLUS - B		13%	8%		
Medium Equity (MA) GARP Growth Seeker	NEDGROUP OPPORTUNITY - B2			10%		
High Equity (MA) GARP Capital Protector	CORONATION BALANCED PLUS - P			13%	10%	
High Equity (MA) Quantitative Smart Beta/Passive	SATRIX BALANCED INDEX - B1			10%	15%	
Flexible (MA) Multi Style Growth Seeker	CENTAUR BCI FLEXIBLE - C			9%		11%
Flexible (MA) Value (Quality) Capital Protector	PSG FLEXIBLE - M			10%	15%	15%
Flexible (MA) Quality (QARP) Capital Protector	TRUFFLE SCI FLEXIBLE - H			8%	10%	12%
Flexible Equity (MA) GARP Growth Seeker	(ABAX) SANLAM SELECT FLEX EQUITY - B6				15%	12%
Flexible (MA) GARP/Quality Growth Seeker	LAURIUM FLEXIBLE PRESCIENT - B4					11%
SA Equity Multi-Style Agnostic	FAIRTREE EQUITY PRESCIENT - S1				10%	
Property Growth Agnostic	ABSA PROPERTY EQUITY - D		3%	2%	5%	5%
Global Equity Passive Growth Seeker	SATRIX MSCI WORLD EQ IND FEED-B2					8%
Global Equity Quality Agnostic	NEDGROUP GLOBAL EQ FEEDER - B2		3%	3%	8%	7%
Worldwide (MA) Value/Growth Unconstrained	CORONATION MARKET PLUS - P					15%
Global EM's Flexible	CORONATION GLOB EM MAR FLEX-P					4%

