



About us

We have been growing long-term wealth for our institutional and personal investment clients for 28 years. Our business generates financial capital by earning fixed and performance fees on the assets we manage on behalf of our clients. The success of our business is founded on our clients, who entrust us to manage their assets; and on our employees, who work hard to deliver on our core purpose of generating investment excellence for the benefit of all stakeholders.

A PROUD SOUTH AFRICAN COMPANY

As one of the largest independent asset managers in South Africa, we invest the long-term savings of millions of South Africans. Our clients include individuals, retirement funds, medical schemes and financial institutions. We also manage assets for several leading international retirement funds, endowments and family offices. We understand that we have been granted a social licence to operate. We earn this in the ways in which we invest and run our business.

In everything we do, we are guided by five strategic pillars, namely: excellent long-term performance, world-class client service, building a leading global investment capability, active corporate citizenship, and effective governance.

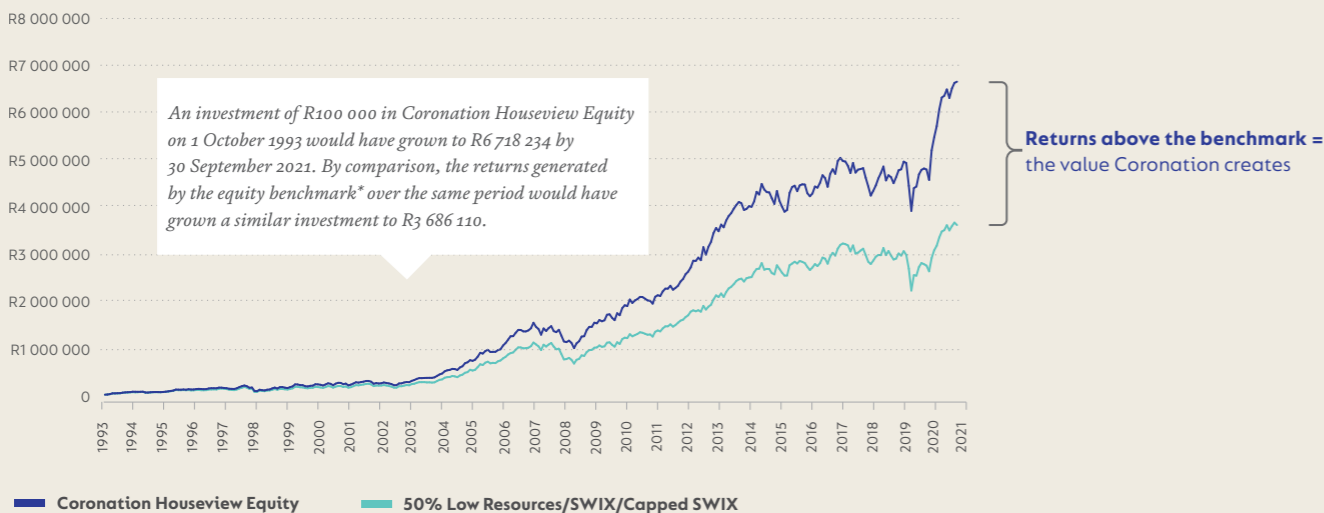
VALUE CREATED BY OUR HOUSEVIEW EQUITY STRATEGY

82%

more than the benchmark since inception

STRONG LONG-TERM INVESTMENT OUTPERFORMANCE

Our ability to deliver attractive and sustainable financial outcomes for clients is evidenced by long-term performance across our fund range, which remains compelling. Of our institutional portfolios, 95% have outperformed their benchmarks since inception¹.



¹ As at 30 September 2021; on an asset-weighted basis; since inception figure refers to strategies with a 10-year+ track record

* FTSE/JSE Capped Shareholder Weighted Index from 1 May 2017. Previously 50% Resources (inception to 31 January 2002) and FTSE/JSE Shareholder Weighted Index (1 February 2002 to 30 April 2017)

The full About Us section of our 2021 Integrated Annual Report details our purpose, values, fund rankings and key performance indicators → [Refer to page 4.](#)

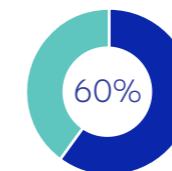
TRANSFORMING OUR BUSINESS AND INDUSTRY

A homegrown South African business committed to transforming our business and society

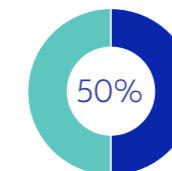
As an active corporate citizen, we have also been active in the transformation of the financial services sector and South African society, empowering our employees and benefiting the communities in which we operate.



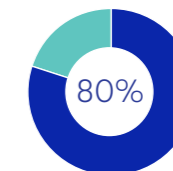
* As measured by the Financial Sector Code.



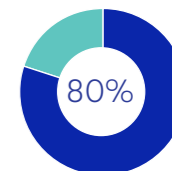
60%
of our employees are black



50%
of our SA investment team leaders are black



80%
of our new hires are black



80%
of our Board are black

R269bn

of total AUM managed by black investment professionals

176

black IFA practices supported through the ASISA IFA Development Programme*

31

black analysts received financial support to train via the Vunani Securities Training Academy*

* Cumulative, since programme inception.

Employee figures refer to South Africa-based employees; all figures as at 30 September 2021.



51%
of our employees are women



52%
of our new hires are black women



64%
of our new hires are women



50%
of our Board are women