

Soundbites from the asset managers

Erik Nel, Terebinth Capital

Co-Manager of the Amplify SCI* Strategic Income Fund

“Markets are cyclical and prone to periods of extreme optimism or pessimism. We believe the most sustainable way to generate long-term meaningful returns, in an uncorrelated way, is to manage money according to a best investment view, strategic allocation way. This allows us to diversify away from risk and to take advantage of opportunities where we see them. For example, we see a great opportunity in SA bonds right now.”

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Brian Thomas, Laurium Capital

Co-Portfolio Manager of the Amplify SCI* Balanced Fund

“We believe being a small, nimble and active manager helps us adds value over time.

Equities in the US have consistently beat fixed income on an inflation-adjusted basis, and we believe this will continue to be the case. We run a reasonably high equity fund in the balanced space. We’re generally pretty close to the 75% equity maximum, and we move allocation between the asset classes where we see the best risk-adjusted return over time.”

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Lourens Pretorius, Matrix Fund Managers

Co-Portfolio Manager of the Amplify SCI* Defensive Balanced Fund, Amplify SCI* Absolute Fund, and Amplify SCI* Income Plus Retail Hedge Fund

“What makes us different is that we’re not focused on a strategic asset allocation model. We’re forward-looking and we take shorter-term asset class views. We believe this helps us deliver on our aim to consistently deliver an inflation-plus return.

Consistency is important. Risky assets outperform over the long term, but not all investors can afford a long-term view. This is why we also need to ensure a focus on protecting downside which

is suited to retirees drawing an income and seeking consistent, inflation-beating returns.”

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