

A man with dark, wavy hair is shown in profile, looking out towards the ocean. The background is a soft-focus sunset or sunrise over the water, with a warm orange glow on the horizon. The man is wearing a dark t-shirt.

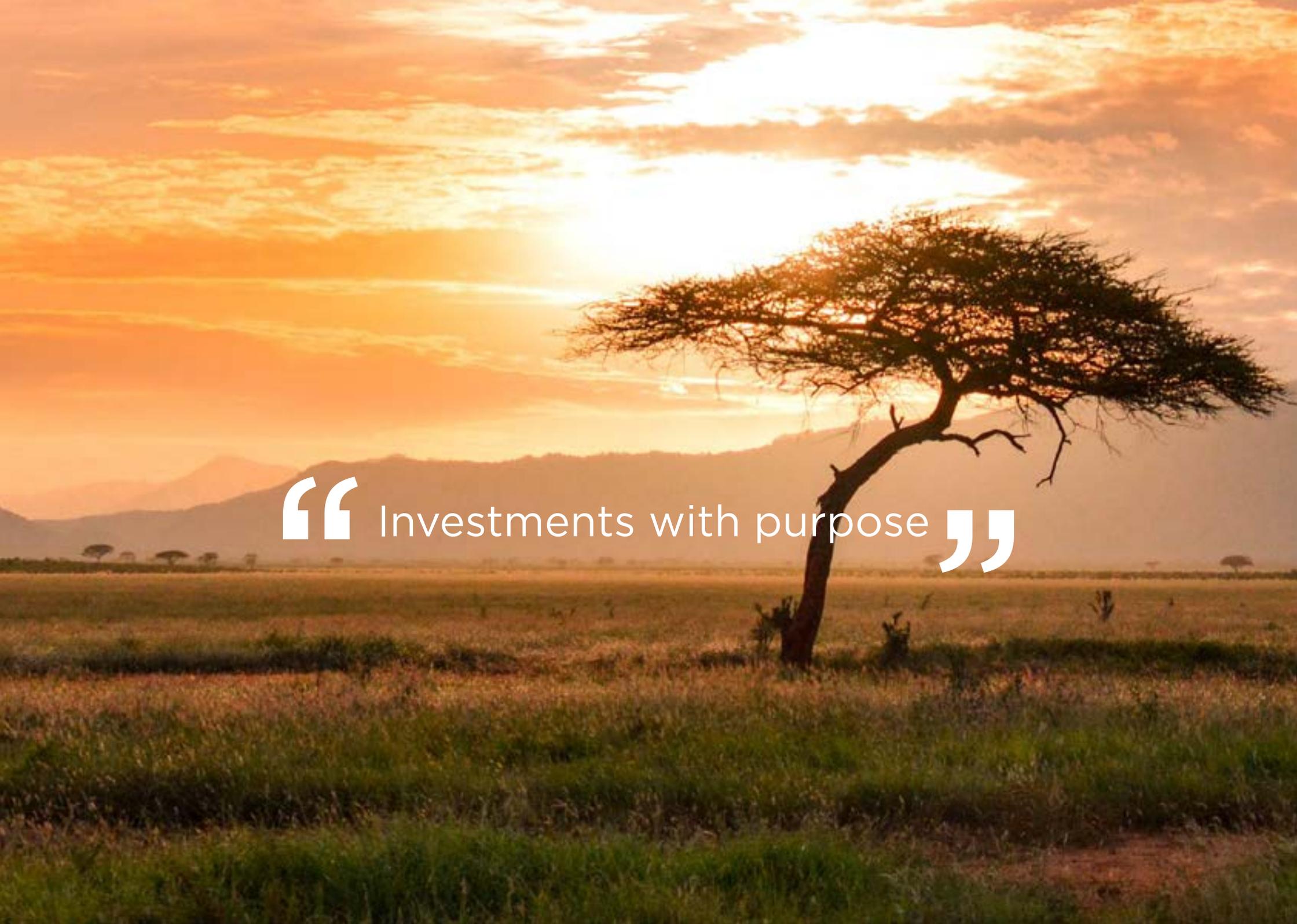
# IMAGINE

WHAT ONE MOMENT  
CAN DO.



INTELLIGENT IMPACT THAT MATTERS





“ Investments with purpose ”



## A MORE INTELLIGENT APPROACH TO INVESTING

Our team of next-generation asset managers are carefully selected for their proven ability to generate superior risk-adjusted returns, while we contribute towards initiatives that truly matter.

### INVEST INTELLIGENTLY

We understand the power that one moment can hold. Using proven investment solutions and strategies, our carefully selected team of next generation asset managers oversee your unit trust and hedge funds to achieve maximum investment impact.

### INVEST EXPERTLY

We amplify what matters. Our team holds a track record that reflects their diligent and deliberate approach to investment strategies.

### INVEST PURPOSEFULLY

Our team channels their expertise and knowledge to create positive impact – we contribute to social and environmental initiatives that make a real, meaningful difference.

When you choose to invest with Amplify, know that our team of next-generation asset managers have the investment expertise to generate meaningful returns and help you realise your financial goals.



“ Skill is a rare commodity ”



## INVEST INTELLIGENTLY

We carefully select our team of next-generation asset managers through a rigorous screening process, with a particular focus on their level of skill and approach to risk.

### **How we measure skill**

Truly skilled managers stick to their convictions. They're able to see opportunities in the market that allow them to extract outperformance sustainably – based on a foundation of research, teamwork, and the ability to learn continuously.

A skilled next-generation asset manager is motivated, experienced, and tenacious, and, most importantly, they are willing to go the extra mile to find a sustainable competitive advantage that enables them to outperform their benchmark without taking on unnecessary amounts of risk.

### **How we measure risk**

While a good risk rating is an important factor, it's imperative that we feel comfortable with the manager in question's overall approach.

That's why we look for asset managers with a stable background, in terms of ownership and assets under management growth. We also check if their business and investment interests align with the business, and whether admin and compliance functions support scalability, enabling them to become a next-generation asset manager.



“ A more intelligent  
approach to investing ”



## INVEST EXPERTLY

With the help and expertise of our team of next-generation asset managers, we oversee a range of unit trusts and hedge funds suited to your various needs and goals.

Have a look through our solutions and strategies, and take the next step towards elevating your future.



## UNIT TRUSTS

Unit trusts are a long-standing investment solution for meeting financial goals.

From multi-asset, high-equity solutions to stable, consistent growth strategies, all our unit trusts offer superior, risk-adjusted returns.



## AMPLIFY SCI\* STRATEGIC INCOME FUND

Designed to outperform cash by investing in high quality and liquid assets.

### FUND SUMMARY

Risk Profile	Conservative	Time Horizon	Minimum 2 years
Benchmark	STeFI + 1%	Fund Classification	(ASISA) South African Multi-Asset Income
Fund Manager	Terebrinth Capital	Solution Launch Date	01 September 2014

#### Overview

An actively managed, flexible fixed interest solution for conservative investors that have a 2-year investment horizon.



Conservative risk profile



Aims to provide a high level of income greater than cash



Diversification across high income producing assets offers downside protection

Offshore investments are allowed, up to the prescribed offshore limit as per regulations.

This solution is Regulation 28 compliant.

Managed by Terebrinth Capital. A specialist fixed income asset manager earning multiple awards.



## AMPLIFY SCI\* WEALTH PROTECTOR FUND

An award-winning solution providing capital protection over 12 months and outperforming inflation by 3% p.a.

### FUND SUMMARY

Risk Profile	Cautious	Time Horizon	Minimum 3 years
Benchmark	CPI +3%	Fund Classification	(ASISA) South African Multi-Asset Low Equity
Fund Manager	Truffle Asset Management	Solution Launch Date	15 August 2016

#### Overview

This is a multi-asset solution with a cautious risk profile, for investors that have an investment horizon longer than 3 years.



Cautious risk profile



Aims to provide investment protection over a rolling one-year period



Invests across different asset classes with exposure less than 40% for equities, 60% for bonds and 50% for cash

This solution is Regulation 28 compliant and may invest in listed and unlisted financial instruments (derivatives) and offshore investments to achieve its objective.

Managed by Truffle Asset Management. A multiple award-winning asset manager able to identify opportunities with the highest growth potential at an appropriate level of risk.



## AMPLIFY SCI\* DEFENSIVE BALANCED FUND

Consistent, low-risk returns making it ideal for investors seeking stable returns.

### FUND SUMMARY

<b>Risk Profile</b>	Cautious	<b>Time Horizon</b>	Minimum 3 years
<b>Benchmark</b>	Peer average of (ASISA) South African Multi-Asset Low Equity	<b>Fund Classification</b>	(ASISA) South African Multi-Asset Low Equity
<b>Fund Manager</b>	Matrix Fund Managers	<b>Solution Launch Date</b>	01 September 2014

### Overview

A stable, low-equity multi-asset class solution for cautious investors with an investment horizon longer than 3 years.



Cautious risk profile



Seeks a reasonable level of income, while preserving your investment in real terms



Invests in a combination of equities, money market instruments, bonds, listed property, as well as international equities and fixed interest assets

This solution holds a maximum of 40% in equities (including offshore equities) and is Regulation 28 compliant.

Managed by Matrix Fund Managers. An award winning asset manager with an experienced team of highly qualified and skilled managers.



## AMPLIFY SCI\* ABSOLUTE FUND

Strives to outperform inflation by 4% p.a. over the long term.

### FUND SUMMARY

<b>Risk Profile</b>	Cautious	<b>Time Horizon</b>	Minimum 4 years
<b>Benchmark</b>	Average of fund classification	<b>Fund Classification</b>	(ASISA) South African Multi-Asset Medium Equity
<b>Fund Manager</b>	Matrix Fund Managers	<b>Solution Launch Date</b>	01 October 2017

#### Overview

This is a medium equity multi-asset solution for cautious investors who have a 4-year or more investment horizon.



Cautious risk profile



Seeks positive real returns, while minimising the risk of investment losses over the medium term



Invests in a combination of equities, money market instruments, bonds, listed property, as well as international equities and fixed interest assets

This solution holds a maximum of 60% in equities (including offshore equities) and is Regulation 28 compliant.

Managed by Matrix Fund Managers. An award winning asset manager with an experienced team of highly qualified and skilled managers.



## AMPLIFY SCI\* BALANCED FUND

A strategy that delivers long term capital growth through strong upside capture of the market.

### FUND SUMMARY

<b>Risk Profile</b>	Moderate	<b>Time Horizon</b>	Minimum 5 years
<b>Benchmark</b>	Peer average of (ASISA) South African Multi-Asset High Equity	<b>Fund Classification</b>	(ASISA) South African Multi-Asset High Equity
<b>Fund Manager</b>	Laurium Capital	<b>Solution Launch Date</b>	06 March 2020

### Overview

This is a multi-asset, high-equity solution with a moderate risk profile for investors with a 5-year or more investment horizon.



Moderate risk profile



Aims to deliver long-term investment growth



Invests in a balanced manner across a broad range of asset classes such as equities, money market instruments, bonds, listed property, as well as international equities and fixed interest assets

This solution holds a maximum of 75% in equities (including offshore equities) and is Regulation 28 compliant.

Managed by Laurium Capital. An independent asset manager with a distinctly differentiated skills set and approach that takes advantage of special situations and trading opportunities.



## AMPLIFY SCI\* FLEXIBLE EQUITY FUND

Seeks maximum capital growth with 2/3rds of the upside and 1/3rd of the downside of the equity market.

### FUND SUMMARY

<b>Risk Profile</b>	Moderate Aggressive	<b>Time Horizon</b>	Minimum 5+ years
<b>Benchmark</b>	Peer average of (ASISA) South African Multi-Asset Flexible	<b>Fund Classification</b>	(ASISA) South African Multi-Asset Flexible
<b>Fund Manager</b>	Abax Investments	<b>Solution Launch Date</b>	01 September 2014

### Overview

This is an actively managed flexible asset allocation solution for moderate aggressive investors, with an investment horizon greater than 5 years.



Moderate to aggressive risk profile



Pursues equity-like returns at lower levels of risk due to its sound risk management framework



A high allocation to growth assets can be expected, with extensive use of various hedging strategies to limit downside risks associated with high equity allocations

This solution diversifies across all asset classes.

Managed by Abax Investments. An established asset manager with a team of highly qualified and experienced investment managers, dedicated exclusively to active fund management.



## AMPLIFY SCI\* EQUITY FUND

An investment strategy that aims to outperform the local equity market.

### FUND SUMMARY

Risk Profile	Aggressive	Time Horizon	Minimum 5+ years
Benchmark	SWIX	Fund Classification	(ASISA) South African Equilty General
Fund Manager	Oyster Catcher Investments	Strategy Launch Date	01 September 2014

#### Overview

This is a pure equity strategy and applies to aggressive investors, who have a time horizon greater than 5 years.



Aggressive risk profile



Seeks to deliver consistent market-beating returns over the long term



Invests in a combination of various companies and sectors, both locally and offshore, that are undervalued relative to their realistic growth prospects

Managed by Oyster Catcher Investments. An independently owned investment manager with a valuation-driven approach and quality bias, buying companies at attractive prices to increase margins of safety and risk/reward ratios.



## HEDGE FUNDS

Hedge funds are an increasingly popular alternative investment strategy to diversify your portfolio. From hedge funds for cautious investors to aggressive, high conviction opportunities for long-term capital growth, our experienced managers can help you successfully manage your investment towards your goals.



## AMPLIFY SCI\* REAL INCOME RETAIL HEDGE FUND

Delivers stable, risk-adjusted returns on fixed income and commodity opportunities.

### FUND SUMMARY

<b>Risk Profile</b>	Cautious	<b>Benchmark</b>	STeFI Call Rate
<b>Investable Universe</b>	Fixed-income instruments, commodities, foreign investments and related derivatives	<b>Fund Classification</b>	Retail Hedge Fund - South African Multi-strategy
<b>Fund Manager</b>	Marble Rock Asset Managers	<b>Launch Date</b>	07 January 2020

#### Overview

A fixed income-focused hedge fund suitable for cautious investors, with a long-term investment horizon.



Cautious risk profile



Aims to deliver uncorrelated, superior, risk-adjusted returns



Invests across a variety of underlying asset classes, primarily fixed income securities and may invest offshore

Managed by Marble Rock Asset Management. An experienced fixed-income and commodities hedge fund manager.



## AMPLIFY SCI\* DIVERSIFIED INCOME RETAIL HEDGE FUND

Designed to provide consistent risk-adjusted returns using a diversified, award-winning fixed income strategy.

### FUND SUMMARY

<b>Risk Profile</b>	Cautious Moderate	<b>Benchmark</b>	STeFI
<b>Investable Universe</b>	Fixed-income instruments and related derivatives	<b>Fund Classification</b>	Retail Hedge Fund - South African Fixed Income
<b>Fund Manager</b>	Terebinth Capital	<b>Launch Date</b>	12 February 2020

#### Overview

A cautious to moderate fixed income-focused hedge fund concentrating on macro strategies.

-  Cautious to moderate risk profile
-  Aims for returns in excess of 5% over benchmark with a strong focus on risk management
-  Primarily concentrated in the most liquid areas of the broader income spectrum

Managed by Terebinth Capital. A specialist fixed income asset manager earning multiple hedge fund awards.



## AMPLIFY SCI\* ABSOLUTE INCOME RETAIL HEDGE FUND

Aims for high positive returns in spite of interest rate changes, using an award-winning fixed income strategy.

### FUND SUMMARY

<b>Risk Profile</b>	Moderate Aggressive	<b>Benchmark</b>	STeFI
<b>Investable Universe</b>	Fixed-income instruments and related derivatives	<b>Fund Classification</b>	Retail Hedge Fund - South African Fixed Income
<b>Fund Manager</b>	Acumen Capital	<b>Launch Date</b>	02 January 2020

#### Overview

A fixed income-focused hedge fund strategy suitable for moderate to aggressive investors.



Moderate to aggressive risk profile



Seeks positive returns regardless of the direction of interest rates



Invests primarily in South African government bonds and interest rate derivatives such as swaps and forward rate agreements (FRAs)

Managed by Acumen Capital. An experienced fixed income focused asset manager that uses in-house proprietary analytical tools, which have been built over the past 20 years.



## AMPLIFY SCI\* INCOME PLUS RETAIL HEDGE FUND

Strives for strong returns using a high conviction, award-winning fixed income strategy.

### FUND SUMMARY

<b>Risk Profile</b>	Aggressive	<b>Benchmark</b>	STeFI
<b>Investable Universe</b>	Fixed-income instruments and related derivatives	<b>Fund Classification</b>	Retail Hedge Fund - South African Fixed Income
<b>Fund Manager</b>	Matrix Fund Managers	<b>Launch Date</b>	07 January 2020

#### Overview

An aggressive fixed income focused hedge fund that seeks to fulfil its investment objective irrespective of the performance of the financial markets or any particular asset class.



Aggressive risk profile



Pursues an annualised return of cash +8% over rolling three years



Invests in the South African fixed income market and related derivatives markets

Managed by Matrix Fund Managers. An award winning asset manager with an experienced team of highly qualified and skilled managers.



## AMPLIFY SCI\* ENHANCED EQUITY RETAIL HEDGE FUND

Provides investment stability and downside protection with far lesser risk than the equity market.

### FUND SUMMARY

<b>Risk Profile</b>	Cautious to moderate	<b>Benchmark</b>	STeFI
<b>Investable Universe</b>	Listed shares, bonds and property, as well as cash and cash equivalents, both in South Africa and internationally	<b>Fund Classification</b>	Retail Hedge Fund - South Africa Long Short Neutral
<b>Fund Manager</b>	Peregrine Capital	<b>Launch Date</b>	01 June 2021

### Overview

A cautious to moderate market neutral hedge fund with a low level of market risk and minimal correlation to the equity market.



Cautious to moderate risk profile



Seeks stable returns that exceed inflation whilst preserving capital over the medium term



Invests in a wide range of local and international assets

Managed by Peregrine Capital. South Africa's longest-running hedge fund manager who believes that disciplined and consistent investment process application will generate superior returns over the medium term.



## AMPLIFY SCI\* MANAGED EQUITY RETAIL HEDGE FUND

Aggressively delivers returns in excess of the local equity market.

### FUND SUMMARY

<b>Risk Profile</b>	Aggressive	<b>Benchmark</b>	ALSI
<b>Investable Universe</b>	Listed shares, bonds and property, as well as cash and cash equivalents, both in South Africa and internationally.	<b>Fund Classification</b>	Retail Hedge Fund - South African Long Short Long Bias Equity Hedge Fund
<b>Fund Manager</b>	Oyster Catcher Investments	<b>Launch Date</b>	21 October 2020

### Overview

An aggressive, long-short equity hedge fund that provides long-term wealth for investors by delivering absolute returns utilising both long and short opportunities.



Aggressive risk profile



Seeks positive real returns utilising both long and short investment opportunities



Invests in listed shares, bonds and property, as well as cash and cash equivalents, both in South Africa and internationally

Managed by Oyster Catcher Investments. An equity house that follows a meticulous investment process centred around a validation-based philosophy using bottom-up research to establish intrinsic value.



## AMPLIFY SCI\* MULTI STRATEGY RETAIL HEDGE FUND

Designed to protect investments utilising the full asset class spectrum.

### FUND SUMMARY

<b>Risk Profile</b>	Moderate	<b>Benchmark</b>	STeFI + 1%
<b>Investable Universe</b>	Listed shares, bonds and property, as well as cash and cash equivalents, both in South Africa and internationally	<b>Fund Classification</b>	Retail Hedge Fund - South Africa Multi-Strategy
<b>Fund Manager</b>	Obsidian Capital	<b>Launch Date</b>	07 January 2020

#### Overview

A moderate multi-asset hedge fund that maximises returns over the medium to long term by encompassing the macroeconomic environment in its valuation process.

-  Moderate risk profile
-  Seeks CPI+3% at acceptable levels of risk
-  Invests across the full asset class spectrum using a combination of asset allocation and stock selection

Managed by Obsidian Capital. An asset manager that appreciates the interconnected nature of markets and the need to harness those relationships to make successful investments.

A photograph of a rhinoceros in a savanna landscape. The rhinoceros is on the right side of the frame, facing left. The background consists of dry, brownish grass and sparse, green and brown bushes. The lighting is bright, suggesting a sunny day.

“ In a world so driven by returns,  
how can investments  
make a difference? ”



## INVESTING WITH PURPOSE

**At Amplify, we appreciate the impact that one moment can have.**

Through expertise and knowledge, we harness each of these moments to help grow your investments and affect positive change in the world.

With Amplify, you can be sure that your investments are making a real, meaningful difference.

A silhouette of a person sitting on a rock, reading a book. The background is a warm, golden sunset sky with soft clouds. The person is on the left side of the frame, facing right. The text is overlaid in the center-right area.

“ Making an impact.  
We’re about more than investing ”



## AMPLIFY AND THE GOOD WORK FOUNDATION

**South Africa has an alarmingly high youth unemployment rate. It's an issue that matters and demands impact.**

This is why we partner directly with the Good Work Foundation, contributing to its education initiatives that look to deliver 21st-century digital learning opportunities which create access, opportunity and employability for rural and marginalised communities.



## AMPLIFY AND THE GOOD WORK FOUNDATION

### **Education and Employment**

Through our contribution, we are able to provide bursaries to young community members around the Greater Kruger National Park, enabling them to grow real, tangible skills that can help them pursue career and employment opportunities.

### **Amplifying the Technology Industry**

One such opportunity is in the IT field through the foundation's ICT Academy, which offers a MICT certified one-year certificate that provides a variety of valuable, real-world skills in one of today's fastest-growing industries.

### **Amplifying the Tourism and Hospitality Industry**

Another such opportunity is in hospitality through the foundation's Travel and Tourism Academy, which offers CATHSETA certified courses that connect young rural South Africans with significant opportunities in the growing industry of wildlife tourism.



## AMPLIFY AND SANPARKS

Environmental crime is threatening the survival of key species, causing uncontrollable damage to natural habitats and is increasingly compromising community safety. To help combat this, Amplify has partnered with Environmental Crime Investigation (ECI) Unit, a specialist unit whose specific focus is on rhino-related safety in the greater Kruger National area, as well as abalone and tourist-related safety in the Cape region.

### **Conservation**

Preserving our environment for future generations is extremely important to us. We support conservation initiatives that focus on protecting and saving wildlife and uplifting the communities living alongside these conservation areas.

### **Saving our Rhinos**

Decimated by poaching and nearing extinction, the rhino is a symbol of the urgent and important need for wildlife conservation. This is why we provide financial support to the SANParks' ECI unit to actively monitor, protect and secure the rhino population.



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Abax Investments (FSP no: 856) Acumen Capital (FSP no: 14927)  
Laurium Capital (FSP no: 34142) Marble Rock (FSP no: 45906)  
Matrix Fund Managers (FSP no: 44663) Obsidian Capital (FSP no: 32444)  
Oystercatcher Investments (FSP no: 50509) Peregrine Capital (FSP no: 607)  
Terebinth Capital (FSP no: 47909) Truffle Asset Management (FSP no: 36584)

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**INTELLIGENT IMPACT THAT MATTERS**