



INVEST IMPACT GROW



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Next-generation asset management

Investment strategy

Amplify Investment Partners (Amplify) offers a range of unit trusts and hedge funds managed by independent, next-generation asset managers. We carefully select dynamic managers through a rigorous, proven screening process. We aim to partner with managers that have the following persistent attributes:

01 A proven track record

Our progressive managers have a proven ability to generate superior risk-adjusted returns sustainably. By identifying the most skilful managers across various investment mandates, our clients are well placed to grow their portfolios to achieve their long-term goals.

02 Independent

It is essential that our asset managers' interests are aligned with our clients' interests. That is why we only partner with dynamic, independent, owner-managed asset managers. This enables our asset managers to focus on delivering the best investment outcomes for our clients while maintaining complete independence in managing the funds' assets.

Robust manager research

We meticulously screen the full universe of asset managers and their investment strategies, following a quantitative and qualitative process. We assess managers based on the two precise drivers and philosophies that underpin their investment performance: investment skill and their risk factors.

Through in-depth research we are able to distinguish between true skill and luck, giving us the ability to identify managers that are truly skilful.

HOW WE DETERMINE WHICH MANAGERS TO PARTNER WITH

We assess managers based on 2 key factors:

Skill rating: Determines whether a manager is skilful from a tangible and intangible perspective – this determines whether or not we will partner with the manager.

Risk rating: Determines whether we are comfortable with the manager's business and investment risk.

Skill factors

Skill is rare

Through in-depth research we are able to partner with managers that are truly skilful.

01

Investment Philosophy

Is the manager exploiting an inefficiency in the market that allows them to extract outperformance in a sustainable way, and do they stick to their convictions?

03

Investment Team

Do the key individuals and the wider investment team have relevant investment experience? Is the investment team motivated and focused on delivering its goals?

02

Process

Does research, portfolio construction and risk management represent the philosophy in action, and are they willing to evolve and learn from past mistakes?

04

Edge

Does the manager have a sustainable competitive advantage which enables them to outperform their benchmark?



**SKILLFUL
MANAGERS ARE
THOSE WHO
EXPLOIT AN
INEFFICIENCY
IN THE MARKET
WHICH IN TURN
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OUTPERFORM IN A
SUSTAINABLE WAY.**

HOW WE MEASURE SKILL

1. Consistent application of investment philosophy
2. Process alignment to investment philosophy
3. Strength of the investment team
4. Competitive edge to outperform the benchmark



Risk factors

Business and Investment Risk

Has the company been stable (in terms of ownership, AUM growth and client diversification)?

Are their investment interests aligned with the business?

Do the admin and compliance functions support scalability?

HOW WE MEASURE RISK

1. Company stability
2. Business and investment team interest alignment
3. Admin and compliance function support for scalability



Our funds

Our funds meet a range of needs on the risk-return spectrum.

Our funds are managed by independent, next-generation asset managers, carefully selected through our rigorous manager research and screening process. These skilful managers are agile and have a wide range of investable assets. Together we aim to provide clients with superior risk-adjusted returns and to help them achieve their goals over the long term.

Our range of Unit Trusts

Fund Name	Fund Manager	Risk Profile	Fund Aim
Amplify SCI' Strategic Income Fund	Terebinth Capital	Conservative	High level of income at low levels of risk.
Amplify SCI' Defensive Balanced Fund	Matrix Fund Managers	Cautious	Consistent, reasonable level of income while preserving capital.
Amplify SCI' Wealth Protector Fund	Truffle Asset Management	Cautious	Capital protection over a rolling one-year period while generating income and capital growth over the medium term at low levels of volatility.
Amplify SCI' Absolute Fund	Matrix Fund Managers	Moderate	Deliver consistent growth while minimising the risk of capital loss over the medium term.
Amplify SCI* Balanced Fund	Laurium Capital	Moderate	Provide investors with long-term capital growth with strong downside protection.
Amplify SCI' Flexible Equity Fund	Abax Investments	Moderate Aggressive	Achieve maximum capital growth over the long-term within a sound risk management framework.
Amplify SCI' Equity Fund	Sentio Capital	Aggressive	Provide consistent benchmark beating returns over the long-term at lower levels of risk.

* Sanlam Collective Investments

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Our range of Hedge Funds

Fund Name	Fund Manager	Risk Profile	Fund Aim
Sanlam Alternative Rho RIHF**	Marble Rock Asset Management	Stable Fixed Income	Uncorrelated and superior, risk-adjusted returns through the dynamic implementation of investment strategies across a variety of underlying asset classes, primarily fixed-income securities. It invests in, or enters into, listed and unlisted financial instruments (derivatives) and make foreign investments.
Sanlam Alternative Veta RIHF*	Terebinth Capital	Cautious Moderate Fixed Income	Returns in excess of 5% over benchmark on an average annual basis over rolling 36-month periods with a low degree of volatility. The strategy is primarily concentrated in the most liquid areas of the broader income spectrum, with a strong focus on risk management
Sanlam Alternative Zeta RIHF**	Acumen Capital	Moderate Aggressive Fixed Income	Achieve positive returns, over the long term, regardless of the direction of the interest rates and capitalize on inefficiencies that occur as a result of supply and demand. This strategy invests primarily in South African government bonds and interest rate derivatives.
Sanlam Alternative Vega RIHF**	Matrix Fund Managers	Assertive Fixed Income	Net annualised returns of Cash + 8% over rolling three year periods. The investment objective is pursued irrespective of the performance of the financial markets or any particular asset class.

**RHF stands for Retail Hedge Fund

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**MAKING AN IMPACT
WE'RE ABOUT
MORE THAN JUST
INVESTING**

Investing is important. But we believe that making an impact is essential too, particularly in the environment around us. To help secure a more sustainable future for communities and wildlife alike, we are committed to supporting conservation, education and employment initiatives. When you invest with Amplify, you help make this possible.

Preserving our wildlife heritage and uplifting communities

Preserving our environment for future generations is vital to us. To ensure that our contribution is meaningful, we support conservation initiatives which focus on protecting wildlife and uplifting the communities living alongside these conservation areas.

Helping to protect our rhinos from extinction

Decimated by poaching and near extinction, the rhino reminds us of the urgent and vital need for wildlife conservation. That's why we provide financial support to initiatives that have a positive impact on rhino conservation and the growth of the rhino population.

Equipping school-leavers for the workplace

We have partnered with the Good Work Foundation, which aims to deliver 21st Century learning opportunities to rural and marginalised communities. The foundation's Travel and Tourism Academy focuses on connecting young rural South Africans with significant opportunities in the growing industry of wildlife tourism.

We also provide bursaries to young people in the community in the Greater Kruger National Park area that will enable them to pursue tertiary studies, opening doors to more lucrative and growing career opportunities by strengthening their marketability.



info@amplify.co.za

www.amplify.co.za

Abax Investments is a licenced financial services provider (FSP no: 856)
Matrix Fund Managers is a licenced financial services provider (FSP no: 44663)
Sentio Capital Management is a licenced financial services provider (FSP no: 33483)
Terebinth Capital is a licenced financial services provider (FSP no: 47909)
Truffle Asset Management is a licenced financial services provider (FSP no: 36584)
Laurium Capital is a licenced financial services provider (FSP no: 34142)

Sanlam Collective Investments (RF) (Pty) Ltd is a registered and approved Manager in terms of the Collective Investment Schemes Control Act. Collective investment schemes are generally medium- to long-term investments. Past performance is not necessarily a guide to future performance, and the value of investments/units /unit trusts may go down as well as up. A schedule of fees and maximum commissions is available from the Manager on request. Collective investments are traded at ruling prices and can engage in borrowing and scrip lending. The Manager does not provide any guarantee with respect to either the capital or the return of a portfolio. The manager has the right to close the portfolio to new investors to manage it more efficiently in accordance with its mandate. Income funds derive their income primarily from interest-bearing instruments. The yield is current and is calculated daily. If the fund holds assets in foreign countries it could be exposed to the following risks regarding potential constraints on liquidity and the repatriation of funds: macro-economic, political, foreign exchange. The Manager retains full legal responsibility for the third party named portfolio.

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