

# Curate Investments: The art of investing

Curate Investments is a new asset manager that opened in 2024 with a clear mission: to find the best people to look after its clients' money and provide clients with access to top-tier global expertise, whatever their investment goals. *Blue Chip* speaks to CEO, Ray Mhere.



Ray Mhere, CEO, Curate Investments

**Ray, please tell us about the trajectory of your professional journey to your current position as CEO of Curate Investments.**

I began my career at Allan Gray, where I spent a decade in various roles across operations and distribution. My final position there was Johannesburg regional manager, overseeing the company's strategic expansion in the region.

In March 2020, I joined Momentum as Head of Investment Distribution, responsible for marketing and distributing Momentum Investments to financial advisers across South Africa. I later served as Head of Retail Business at Prescient before setting out to launch Curate Investments in February 2023.

**What is your academic history?**

I am currently pursuing an Executive MBA at the University of Oxford. I hold a Bachelor of Commerce degree in Economics and Law from the University of Cape Town and a Postgraduate Diploma in Financial Planning from the University of the Free State.

**Curate officially opened its doors in August 2024. As the CEO, what are your objectives for Curate?**

My primary goal is to establish Curate as a trusted asset manager known for delivering on its promises to clients. We aim to be a global business rooted in simplicity, excellence and relevance. We treat our investors as real people by being transparent and straightforward in everything we say and do.

**Please provide a brief overview of Curate, as well as its goals and philosophy.**

We give investors the comfort of knowing that we have handpicked top managers for each of our funds, so they do not have the hassle of choosing between thousands of funds. Our comprehensive fund range provides investors with the strategies they need to meet their different goals.

**What is the art of investing?**

To curate is to care for or collect the best to put on display. Therefore, as our name would suggest, it's in our DNA to handpick the best people to take care of your money. Unlike many asset managers, we don't manage the funds ourselves. Instead, we've searched for exceptional teams of people with different skills to manage each one of our funds.

With decades of experience and extensive knowledge, our fund research team has identified great people who align with our values and can meet investor expectations so you can be confident that you and your clients' money is in good hands. Quite simply, what we do comes from the quality of the people we work with. That is the art of investing.

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**How do you curate your fund managers?**

Selecting the right people is at the heart of what we do. Curate's disciplined and rigorous selection process seeks out outstanding investment teams, wherever they may be across the world.

Our process entails extensive research, evaluating managers based on their track records, philosophies and ability to deliver long-term value. We also believe in looking beyond the numbers. We are looking for long-term partners who show professional integrity, loyalty and alignment with our values and expectations.

Each team we appoint also needs to offer something unique. They must have a distinct approach or quality that makes them stand out, so that we know we are offering investors something they won't find anywhere else – whether it's a novel approach to risk management, a specialised focus on niche markets or a distinctive investment philosophy.

**Please give an overview of your selection of unit trust funds.**

Curate offers solutions designed to complement advisory services, including local and global equity funds, fixed-income solutions, a global property-focused strategy and a multi-asset balanced fund. Each fund is designed to provide a unique value proposition, managed by specialists who are leaders in their respective fields. As we expand, we will offer a comprehensive range of local and international funds, ensuring investors have access to all necessary strategies in one place.

**Curate recently introduced three new global equity funds. Please expand.**

In addition to two hard currency funds (and their respective feeder funds) managed by Robeco, who are the world leaders in systematic/enhanced indexing strategies, Curate has launched three new global equity funds that are actively managed. For the first time in South Africa, Curate clients will exclusively have access to highly rated global managers including:

- **Jennison Associates.** Experts in identifying growth-oriented companies with exceptional earnings potential, delivering a focused portfolio of high-growth opportunities.
- **Lyrical Asset Management.** A value-driven specialist that targets undervalued businesses poised for long-term success, leveraging disciplined analysis to uncover quality hidden within the market's cheapest shares.
- **Evenlode Investment Management.** Dedicated to sustainable income and capital preservation, with a focus on high-quality companies demonstrating dividend growth and resilience.

These three new funds reflect our promise to connect investors with globally renowned asset managers, offering diverse strategies to meet varying investment goals.

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**Why choose Curate? How do investors benefit by investing in Curate funds?**

Our mission is to deliver relevant and meaningful investment solutions to investors by partnering with the best fund managers locally and globally. We aim to simplify investing. We've scoured the globe to find the best people to manage each of our unit trusts, so our investors don't need to search through thousands of different funds to find reliable and trustworthy managers – we've done that work for them.

Our emphasis on transparency ensures that investors are always informed about their portfolios. Moreover, our rigorous manager selection and oversight processes guarantee that every fund meets our high standards. By choosing Curate, investors benefit from the art of investing. ■