



By Ray Mhere

CEO of Curate Investments

Curate Investments: Handpicking excellence

Financial advisers today face a vast and complex investment landscape. With nearly 2 000 funds available locally, and hundreds of thousands more globally, finding the best solutions for clients can be daunting. That's where we come in – to simplify the process by offering a handpicked selection of world-class investment managers tailored to meet the needs of clients.

We launched Curate Investments with a clear vision: To provide financial advisers with a carefully considered range of high-quality funds, which align with global best practices and investor expectations. Unlike traditional investment managers, we do not directly manage funds. Instead, we meticulously select top-tier investment managers from around the world, leveraging their expertise to deliver superior investment outcomes.

To curate means to care for or collect the best. It is part of our DNA to handpick the best people to take care of clients' money.

Catering to various investor needs

Our global approach allows us to offer a diverse range of investment strategies, from fixed income to global equities, all managed by experts who align with our high standards of integrity, performance and client-centricity. For financial advisers, this means access to a carefully selected suite of funds that meet stringent selection criteria, eliminating the need for them to sift through thousands of options. This approach not only saves time but also enhances the overall client experience.

Our comprehensive fund offering

We offer a range of funds designed to cater to various investor needs, including:

- **Income funds:** Designed to deliver stable, inflation-outperforming returns, which include the following funds:

Fund name	Fund manager
Curate Momentum Enhanced Yield Fund	Momentum fixed income team
Curate Momentum Flexible Income Fund	Momentum fixed income team
Curate Momentum Income Plus Fund	Momentum fixed income team

- **Capital growth funds:** Focused on medium- to long-term growth, which include the following funds:

Fund name	Fund manager
Curate Momentum Balanced Fund	Visio Fund Management
Curate Momentum Equity Fund	Laurium Capital
Curate Momentum Flexible Property Fund	Sesfikile Capital

- **Global funds:** Provide exposure to global markets through top-tier investment managers, which include the following funds:

Fund name	Fund manager
Curate Global Sustainable Equity Fund	Robeco
Curate Global Emerging Markets Equity Fund	Robeco
Curate Global Value Equity Fund	Lyrical Asset Management
Curate Global Growth Equity Fund	Jennison Associates
Curate Global Quality Equity Fund	Evenlode Investment Management

Our goal is to make the financial adviser's job easier. We've identified the best investment managers, no matter where they are in the world, so they can spend less time researching funds and more time advising their clients.

Why choose Curate Investments?

- **Comprehensive fund range:** We provide a carefully selected range of funds across multiple asset classes, ensuring diverse investment opportunities tailored to different risk appetites and financial goals.
- **An advice-driven proposition:** Our approach is built around supporting financial advisers with expert insights and tools, empowering them to make informed investment decisions for their clients.
- **Simplicity and relevance to assist in building clients' long-term wealth:** We streamline the investment selection process by offering only the most relevant, high-quality fund options, helping financial advisers focus on growing their clients' wealth efficiently.
- **Independent single managers:** We partner with independent, best-in-class investment managers, which bring specialist expertise and a focused investment approach, ensuring quality and transparency.
- **Bringing new global investment managers to South Africa:** We identify and introduce leading global investment managers to the South African market, providing local investors access to international expertise and broader opportunities.

"Our global approach allows us to offer a diverse range of investment strategies"

As the financial advisory landscape continues to evolve, staying ahead requires access to top-tier investment solutions that align with client needs and market realities. We empower advisers by delivering a handpicked selection of global investment management expertise in a simple, relevant and transparent manner.

For more information about the Curate funds, visit our website curate.co.za.

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