



AUSTEN MORRIS ASSOCIATES CITRINE SOUTH AFRICA PARTNERING WITH MORNINGSTAR

Global perspective for South African investors

Taking a global macro view is an imperative. South Africa is an emerging market that represents less than 1% of the investable universe. As such, we are often affected by events and circumstances far from our shores, and not of our doing. But we still fall victim to the effects. That is why having a global perspective and applying this locally is crucial. Morningstar provide this ability on a global stage. Blending 'best of breed' managers who follow different investment styles together provides a smoother, more predictable return profile for our clients.



Morningstar is a globally recognised and revered investment research house. They currently oversee around \$260 billion of assets, and use their international and local macro-insight to create bespoke products and solutions for their clients.

AMA decided to partner with Morningstar for their research capability, global approach and holistic portfolio construction.



CITRINE: "The Merchant's Stone". Citrine assists in both acquiring and maintaining wealth. It is a stone of abundance, attracting wealth, prosperity and success.

SOLUTION:

The CITRINE Investment Range

- Putting investors first
- Independent portfolio construction
- Specialist Investment Managers
- Minimizing costs, maximizing return potential
- Satisfying our client's risk and return objectives

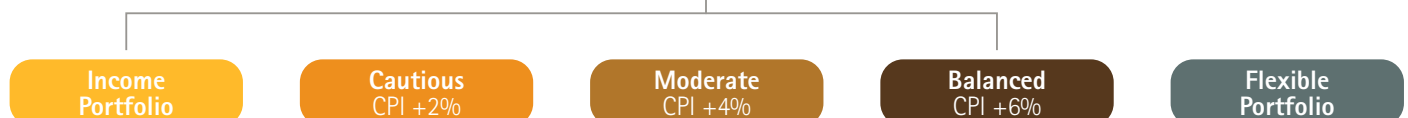
Satisfying risk and return objectives

Our 5 portfolios cover the risk – return spectrum.

We have a specialist income portfolio that blends together different income managers for a smoother, more reliable return profile. We also have target return portfolios for our clients that want to achieve specific return goals. Lastly, we have an equity-only portfolio for maximum capital appreciation over the long term (7 – 10 years).

5 UNIQUE PORTFOLIOS

REGULATION 28



Access

Our portfolios are accessible on two of South Africa's premier Asset Management Platforms, Ninety One and Allan Gray.

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