

Fund overview

- This fund targets a return well ahead of inflation over time to ensure that investors protect and grow their capital.
- It invests in a range of different asset classes, including shares, bonds, cash and listed property, representing the best investment views of the experienced Visio team.
- The fund is highly focused on protecting investors from significant losses.
- It can be used for long-term wealth generation and is ideal for retirement savings.

What this fund aims to do:

- The Curate Balanced Fund is designed to generate strong long-term returns, while protecting investors from heavy short-term losses by investing in a well-diversified portfolio of asset classes.
- While extreme market events will inevitably have an effect on this fund, its risk-conscious approach aims to limit negative returns.
- It can be used as a core part of a long-term wealth generating portfolio.
- It can also be used in a living annuity or tax-free savings account.

'We like to invest for the long-term. And we invest in companies, not names. We have to understand what the business does, whether it's good at it or not, and who is making the decisions. You have to delve into the business and the people behind it. So, when you invest with us, you are investing with the people we have chosen to invest with.'

– Patrice Moyal, Portfolio Manager

How this fund invests:

- The fund invests both in South African and international markets to create a truly diversified portfolio.
- Visio's approach is to explore both the usual and the not-so-obvious places to find interesting ideas and undervalued assets.
- The investment team conducts thorough research into the opportunities it identifies, scrutinising as much information as possible to avoid risks that others may miss.
- Visio always invests with a margin of safety, providing added protection for investors.
- Portfolio managers Jonathan Myerson and Patrice Moyal lead a team with decades of experience in different areas of the market. They always take a truly global view and combine the firm's expertise into this unique portfolio.