



INVESTMENT INSIGHTS

We recently published the 10th edition of our annual Long-Term Perspectives. In this publication our investment professionals discuss key themes which they've identified by tracking investment market performance for over 90 years. In this newsletter, we share key insights from this publication, to enable you to help your clients make the right decisions to grow their wealth in the years and decades to come.



Appointment of OMIG Chief Investment Officer

As an investment management organisation, we are continuously looking for opportunities to enhance our investment capabilities and structures to ensure the best possible client outcomes from our business.

As part of this process, I am pleased to share that as of 1 April 2023, Siboniso Nxumalo has been appointed as the Chief Investment Officer (CIO) of Old Mutual Investment Group.

Siboniso has ultimate accountability for the investment performance of OMIG's active investment capabilities and is also responsible for the investment teams involved in the management of OMIG's active Fundamental, Quantitative and Absolute Return portfolios. Integrating the investment talent deployed in the management of OMIG's active investment capabilities will enhance the investment decision-making processes and ultimately, we believe, the investment performance of the portfolios we manage on behalf of clients.

Shaping our nation's future

We currently find ourselves in Youth Month. It is interesting to note that this year's Youth Month is celebrated under the theme: "Accelerating youth economic emancipation for a sustainable future." The youth of our country have immense potential to shape our nation's future. While we celebrate the invaluable contribution the youth continue to make, we must also acknowledge the challenges they face. With majority of the youth remaining unemployed and considering the current socio-economic state of our country, it is negligent not to empower and guide them towards financial independence.

At Old Mutual, demystifying investing, especially amongst the youth, has always been one of our key focuses. Over the years, we have run various educational campaigns to empower young South Africans to take control of their financial future. To learn more about this, [click here](#).

As South Africa celebrates Youth Month, let us recognise the immense potential of the youth in building a prosperous future for themselves, their country, and future generations.

Warm regards

Gontse Tsatsi
Head of Retail Client Management | Old Mutual Investment Group

OLD MUTUAL UNIT TRUSTS PERFORMANCE UPDATE

Our flagship Old Mutual Global Equity Fund is a top-quartile performer over all long-term investment periods over 5 years. The majority of our multi-asset funds managed by Old Mutual Investment Group is showing top quartile performance over the 3-year period. The Aggressive Balanced Fund of Funds and Maximum Return Fund of Funds managed by Old Mutual Multi-Managers are also top quartile over the 3-year period.

[READ MORE](#)



LONG-TERM PERSPECTIVES 2023


We have been publishing Long-Term Perspectives annually for the past 10 years. This year our focus is on the major macroeconomic drivers of investment returns, such as currency and inflation. The aim of this publication is to draw investors' attention to the long-term patterns in asset behaviour and, in so doing, put shorter-term volatility into perspective. These patterns culminate in eight informative lessons that we believe empower the long-term investor.

[READ MORE](#)

VIDEO SERIES: LONG-TERM PERSPECTIVES

We are excited to launch our Long-Term Perspectives video series. Our Long-Term Perspectives publication has analysed investment data for over 90 years and identified long-term investment lessons. In this video series, we bring these lessons to life through videos narrated by our investment professionals.

[CLICK TO WATCH](#)



ESCAPING THE GRIP OF INFLATION
MERYLL PICK

8 LONG-TERM INVESTMENT LESSONS

Analysing long-term data is crucial to our investment process and it also teaches us some profound lessons. These 8 Long-Term Investment Lessons are based on investment principles which clients can implement to make investing easier and less daunting.

[READ MORE](#)



INVEST WITH PERSPECTIVE Q1 2023

In his quarter one 2023 market update, Siboniso Nxumalo, Chief Investment Officer, talks about two themes: a desynchronised world and South African cycle slow, as he puts our fund performance in perspective. At this moment, we're seeing a high risk of a US recession, and China reopening. While remaining optimistic about South Africa, we're seeing a slowdown cycle.

[CLICK TO LISTEN](#)

RAND MAYDAY

With the rand trading at all-time lows against the dollar, investors are again asking what this says about the state of South Africa, and how we should think about the currency in managing portfolios.

[READ MORE](#)

ESG AND BEE ARE CRUCIAL TO SA'S INCLUSIVE GROWTH QUEST

Despite its acknowledged shortcomings, BEE plays a vital role in South Africa's economic transformation and in addressing intergenerational inequality. However, to ensure sustainable economic growth, another component is needed, and that is where ESG comes into play.

[READ MORE](#)





Old Mutual Investment Group (Pty) Ltd is a Licensed Financial Services Provider.
www.oldmutualinvest.com

Old Mutual Unit Trust Managers (RF) (Pty) Ltd is a registered manager in terms of the Collective Investment Schemes Control Act 45 of 2002. The fund fees and costs that we charge for managing your investment are set out in the relevant fund's Minimum Disclosure Document (MDD) or table of fees and charges, both available on our public website, or from our contact centre. Old Mutual is a member of the Association for Savings & Investment South Africa (ASISA).

This communication is subject to specific restrictions and disclaimers

Details are contained in the following links:
[Unsubscribe](#) | [Disclaimer](#) | [Privacy Policy](#)