



PORTFOLIO INFORMATION

<b>BENCHMARK:</b>	Asset allocation benchmark
<b>LAUNCH DATE:</b>	15 September 2022
<b>RISK PROFILE:</b>	Market-linked, medium to high risk
<b>VEHICLE:</b>	Pooled, life wrapped policy

PERFORMANCE

RETURNS	Portfolio	Benchmark
1 Month	3.3%	3.3%
3 Months	9.8%	7.6%
1 Year	32.8%	32.3%
3 Years	19.3%	19.5%
Since Inception	21.4%	21.8%

Source: Old Mutual Investment Group | Returns are gross.

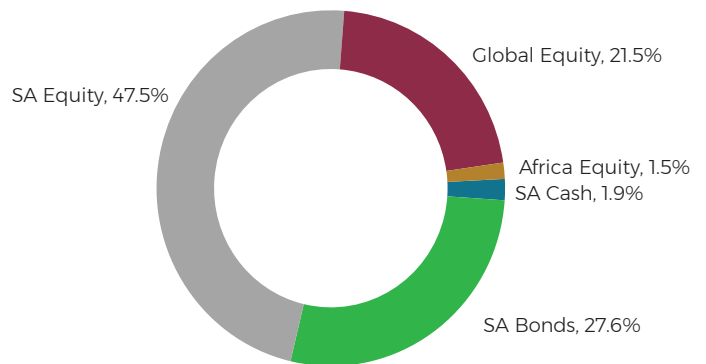
INVESTMENT DESCRIPTION

The Old Mutual Retirement-Driven Investment Growth Portfolio is an actively managed, multi-asset class portfolio. The portfolio is designed to be used with the Old Mutual Retirement-Driven Investment Defensive Portfolio in a lifestaged, defined-contribution strategy.

The portfolio balances the risk and growth of the estimated retirement income projected for retirement fund members. It combines alpha seeking skills and liability risk management techniques to improve the retirement income of members.

The Retirement-Driven Investment portfolios represent Old Mutual Investment Group's best investment view for a lifestaged strategy.

ASSET ANALYSIS

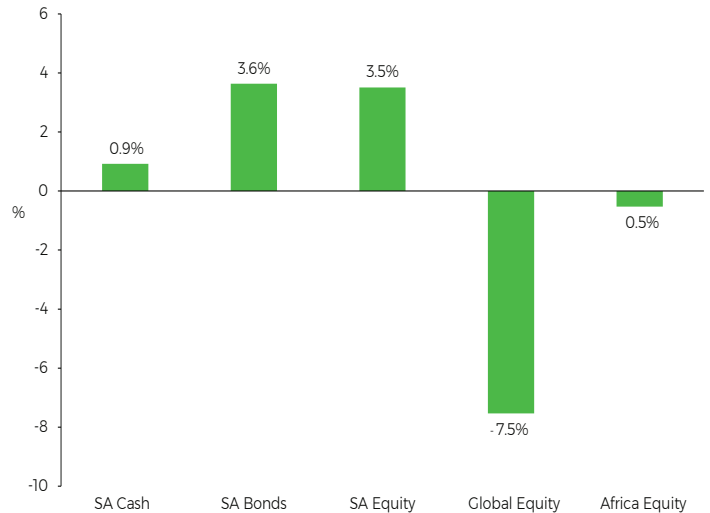


Source: Old Mutual Investment Group

INVESTMENT OBJECTIVE

The portfolio aims to outperform the asset allocation benchmark over rolling five-year periods using active stock selection and tactical asset allocation. The portfolio also aims to balance the risk and growth of estimated future retirement incomes by using liability risk management techniques.

FUND TILT VS BENCHMARKS



Source: Old Mutual Investment Group

INVESTMENT TEAM



JASON SWARTZ

TACTICAL ASSET ALLOCATION PORTFOLIO MANAGER  
MBA, CFA, Charterholder



DWAYNE KLOPPERS

LIABILITY DRIVEN INVESTMENT STRATEGIST  
BSc (Hons), FIA

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