

Important information



Currently not available in the UK to retail investors



Curate is a trading name of MGIM in the UK and is not a separately FCA authorised and regulated firm



**The purpose of this presentation is for information only
- if you are interested in any further information, please contact
your investment specialist in South Africa**



curator

a keeper or custodian of important assets

Key facts and figures



Global brand
and product
distribution



Launched
1 August
2024



AUM
\$2.3bn*



Partnership
asset
management
model



Single
managed

We handpicked the best people to take care of your money

curate
THE ART OF INVESTING

Simplicity

We **handpicked top managers**, so our clients do not have the hassle of choosing between hundreds of unit trusts

Excellence

Partner with good people of the highest integrity, **committed to delivering for our clients**

Depth of research

Extensive and broad **manager research coverage**, we find the best wherever they may be

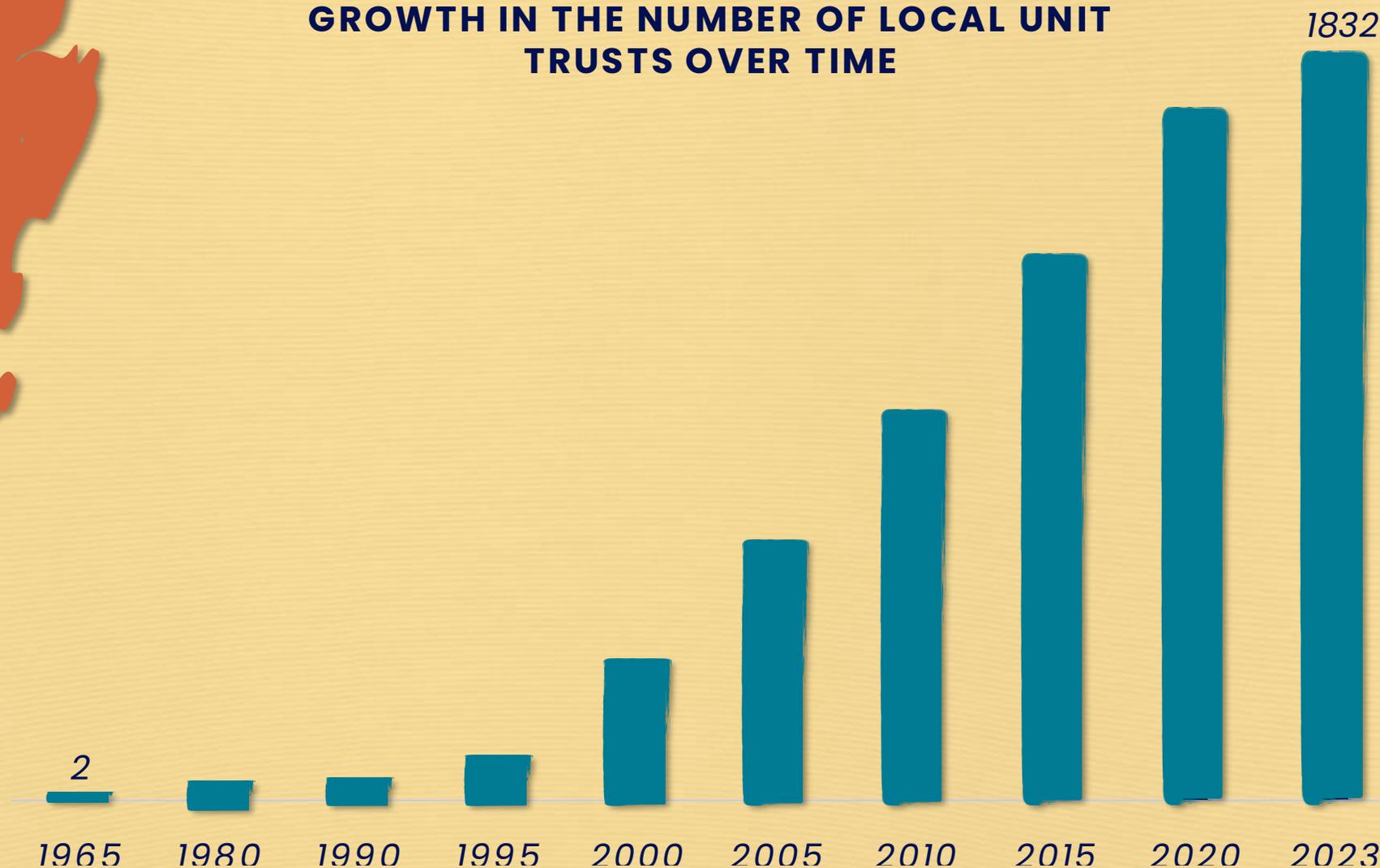
Relevance

Offer our clients access to the **best ideas** from top managers **all over the world**, to help them achieve their investment goals



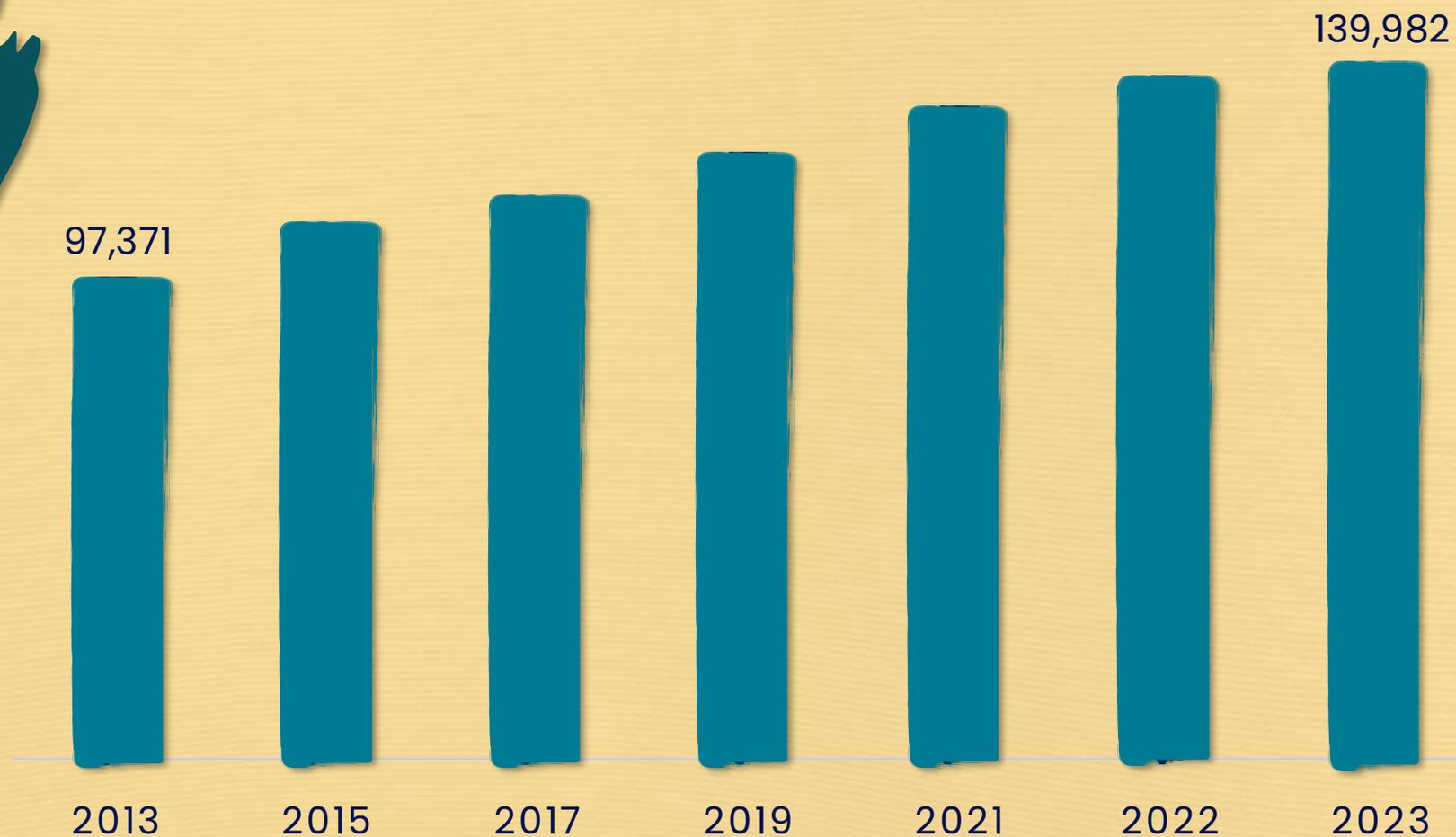
**Simplifying
choice,
locally**

**GROWTH IN THE NUMBER OF LOCAL UNIT
TRUSTS OVER TIME**



**Simplifying
choice,
globally**

**GROWTH IN THE NUMBER. OF WORLDWIDE
REGULATED OPEN-ENDED FUNDS**





LYRICAL
ASSET MANAGEMENT



EVENLODE
INVESTMENTS FOR LIFE



ROBECO
The Investment Engineers



JENNISON
ASSOCIATES



LAURIUM
CAPITAL



momentum
fixed income



SESFIKILE CAPITAL
Property Investments



CELEBRATING TWENTY
YEARS OF INVESTING
VISION 20

**A global
business**

**Broader
opportunity
set**

Depth of research

We cover
multiple
assets classes
and regions



Research team of

23
people

2023

ESG
overlay

465

ENGAGEMENTS

Relevant offering

Proposition led by client needs

Income need

Investors seeking to outperform cash in low-risk investments, who wants to preserve capital or draw an income

Capital growth need

Investors who want to grow their capital to solve their long-term needs

Global need

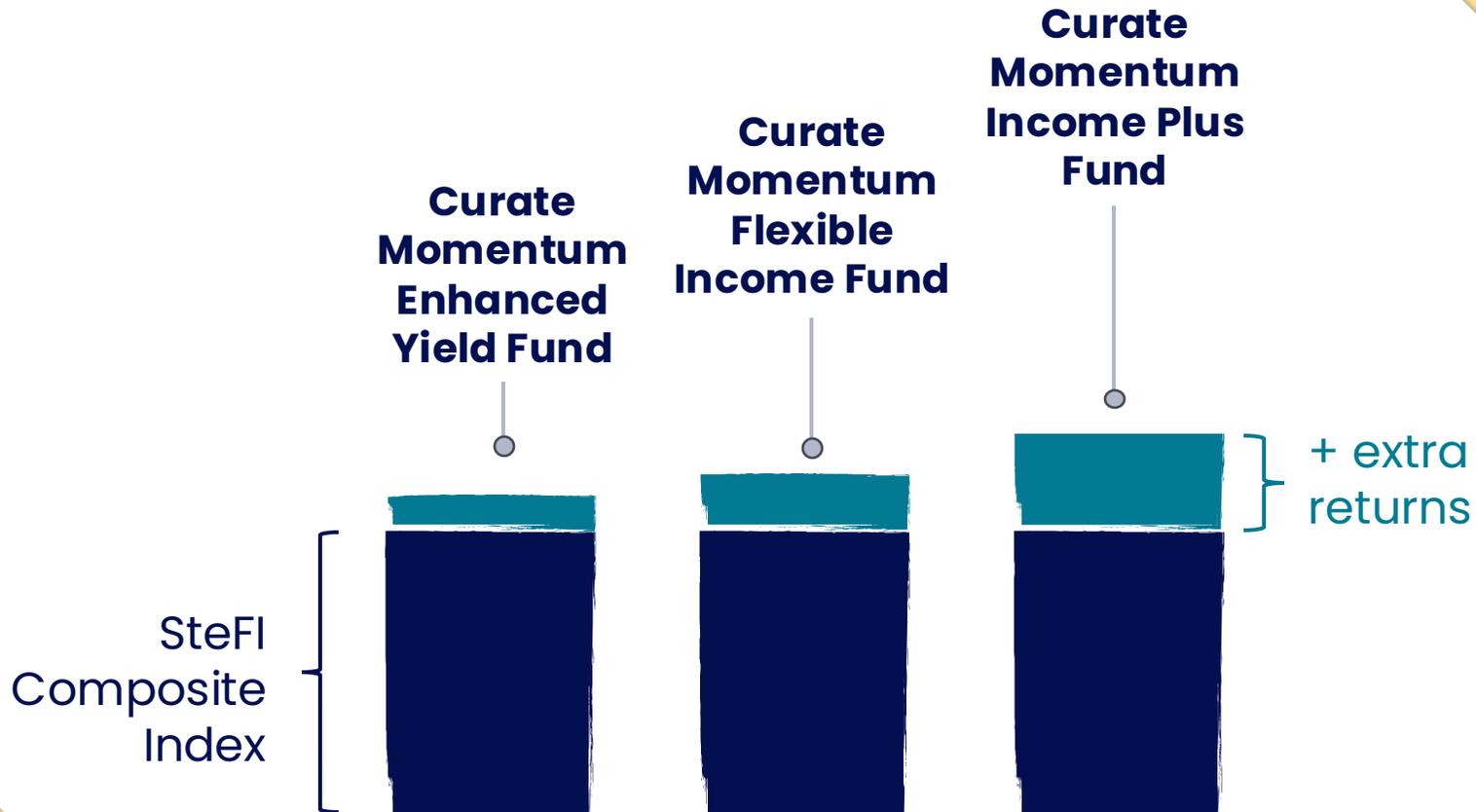
Investors seeking growth and diversification opportunities globally

Fixed income range

Income

Capital growth

Global



**Cash-plus,
multi-asset
and credit**

R80bn*

2004**

Capital growth range

Income



Capital growth

Curate Momentum Equity Fund	Curate Momentum Flexible Property Fund	Curate Momentum Balanced Fund
R56bn*	R16bn*	R28bn*
2008**	2010**	2003**
South Africa	South Africa	South Africa

Global

Global range

Income

Capital growth

Global



Systematic Global Equity	Global Equity	Global Equity	Global Equity
181bn EUR*	£5.7bn*	\$7bn*	\$208bn*
1929**	2009**	2008**	1969**
Netherlands	United Kingdom	New York, USA	Boston, USA

Product development cycle and client needs

Ongoing product development based on client need



Client feedback and demand





Thank you

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