

# PPS Stable Growth Fund



In partnership with  
Laurium Capital

## About the PPS Stable Growth Fund

The PPS Stable Growth Fund is a Regulation 28 compliant portfolio. It is suitable for investors seeking to achieve moderate returns while preserving capital over the medium to long term.

The primary objective of the fund is to outperform the ASISA SA Multi Asset Medium Equity category average.

The investment horizon for this fund is greater than five years.

## About the PPS Partnership Fund manager

In December 2020, Laurium Capital acquired Tantalum Capital and its senior investment professionals by mutual consent. The combined business has approximately R30 billion in assets under management and specialist capabilities across the full range of asset classes.

Rob Oellermann and Melanie Stockigt will continue to manage the PPS Stable Growth Fund and draw on the support of the experienced Laurium investment team. We view the merger as positive for the fund and do not anticipate significant changes given the key decision-makers continued involvement in the portfolio, and their alignment with the broader Laurium investment process.

## Investment approach of the manager

This strategy follows a valuation-based approach with the emphasis on delivering a real return over time. Individual securities are assessed and included in the portfolio based on its ability to deliver real capital growth over the medium to long term, irrespective of the asset class, or the weight of the security in its reference index.

The manager aims to construct a well-diversified portfolio by employing different strategies that should benefit from different market conditions. In-depth fundamental company analysis is key to their process while there is a consideration for macroeconomic factors, which results in a thematic overlay to the allocation.

## How this manager creates wealth

The manager's primary focus is on having a diversified portfolio that is likely to perform well in most market conditions and is likely to be a top performer, if and when, mid and low caps do well.

With vast experience, in-depth company knowledge and a strong focus on research, the manager has the ability to make informed investment decisions in the mid and low cap space, while retaining a nimble edge to portfolio management.

*We partner with managers  
whose investment style  
ensures more consistent  
returns over the investment  
horizon.*



## Why choose PPS Investments

At PPS Investments, we offer a suite of flexible investment solutions for pre-retirement, post-retirement and wealth creation. We create opportunities for optimal diversification through our fund range that caters to various risk appetites and time horizons. Our offering is geared to meet the investment needs of PPS members, their family and other discerning investors, too.

We're part of PPS, a holistic financial services company specialising in bespoke financial solutions exclusively to graduate professionals. Operating under the ethos of mutuality, PPS shares 100% of its profits among its qualifying members.

When investing with us, you could get even more.

- Earn more profit-share allocation via [Linking](#) and the [PPS Profit-Share Cross-Holdings Booster](#).
- Save on administration fees by creating a [Family Network](#).

The information, opinions and any communication from PPS Investments Group, whether written, oral or implied are expressed in good faith and not intended as investment advice, neither does it constitute an offer or solicitation in any manner. Furthermore, all information provided is of a general nature with no regard to the specific investment objectives, financial situation or particular needs of any person. It is recommended that investors first obtain appropriate legal, tax, investment or other professional advice prior to acting upon such information.

Collective Investment Schemes in Securities (CIS) are generally medium-to long-term investments. The value of participatory interests (units) may go down as well as up, and past performance is not necessarily a guide to future performance. CIS are traded at ruling prices and can engage in borrowing and scrip lending up to 10% of the market value of the portfolio to bridge insufficient liquidity. A schedule of fees and charges and maximum commissions is available on request from the manager. A CIS may be closed to new investors in order for it to be managed more efficiently in accordance with its mandate. The manager does not provide any guarantee either in respect of the capital or the return of a portfolio. Certain funds may be exposed to foreign securities and as such, may be subject to additional risks brought about by this exposure.

PPS Investments Group is a subsidiary of Professional Provident Society Insurance Company Limited, a Licensed Insurer and Financial Services Provider. PPS Investments Group consists of the following authorised Financial Services Providers: PPS Investments (Pty) Ltd ("PPSI"), PPS Multi-Managers (Pty) Ltd ("PPSMM") and PPS Investment Administrators (Pty) Ltd ("PPSIA"); and includes the following approved Management Company under the Collective Investment Schemes Control Act: PPS Management Company (RF) (Pty) Ltd ("PPS Manco"). Financial services may be provided by representative(s) rendering financial services under supervision. [www.pps.co.za/invest](http://www.pps.co.za/invest)

The PPS Profit-Share Account and PPS Profit-Share Cross-Holdings Booster are benefits available to PPS members only and are not financial services regulated by the FAIS Act, but are Insurance obligations in terms of the Insurance Act 18 of 2017.

PPS Multi-Managers has appointed the Tantalum Capital, an authorised Financial Services Provider, as the Investment Manager of the PPS Stable Growth Fund.

## Get in touch

Speak to your accredited PPS Investments Financial Adviser.

Alternatively, feel free to contact us directly

t: 0860 468 777 (International calls can be directed to +27 21 672 2783)

e: [clientservices@ppsinvestments.co.za](mailto:clientservices@ppsinvestments.co.za)

w: [www.pps.co.za/invest](http://www.pps.co.za/invest)