



RAGING BULL AWARDS



AWARD AND CERTIFICATE WINNERS

VIRTUAL EVENT

2 FEBRUARY 2021



Investments



CERTIFICATES FOR STRAIGHT PERFORMANCE OVER THREE YEARS

The top performers to December 31, 2020 on a straight performance basis in asset and sector-specific ASISA categories (including the main multi-asset sub-categories).

Methodology: Funds are ranked on a three-year lump sum NAY-to-NAY basis (entry costs not taken into account) with income distributions reinvested at the ex-dividend date, calculations by Profile Data.



Best South African Equity Resources Fund

Ninety One Commodity Fund



Best South African Equity Mid- and Small-Cap Fund

Coronation Smaller Companies Fund



Best South African Multi-Asset Flexible Fund

Long Beach Flexible Prescient Fund



Best South African Multi-Asset Low Equity Fund

Amplify SCI Wealth Protector Fund



Best South African Multi-Asset Medium Equity Fund

Foord Conservative Fund



Best South African Multi-Asset High Equity Fund

Long Beach Managed Prescient Fund



Best South African Multi-Asset Income Fund

Sasfin BCI Flexible Income Fund



Best South African Interest-Bearing Short-Term Fund

Truffle SCI Income Plus Fund



Best South African Interest-Bearing Variable-Term Fund

Absa Bond Fund



Best (SA-Domiciled) Global Multi-Asset Flexible Fund

MI-PLAN IP Global Macro Fund



Best (SA-Domiciled) Worldwide Multi-Asset Flexible Fund

Naviga BCI Worldwide Flexible Fund



Best (FSCA-Approved) Offshore Europe Equity General Fund

T. Rowe Price European Equity Fund



Best (FSCA-Approved) Offshore United States Equity General Fund

Franklin US Opportunities Fund



Best (FSCA-Approved) Offshore Far East Equity General Fund

Templeton China Fund



Best (FSCA-Approved) Offshore Global Fixed-interest Bond Fund

Allan Gray Africa Ex-SA Bond Fund



Best (FSCA-Approved) Offshore Global Real Estate General Fund

First World Hybrid Real Estate Plc

CERTIFICATES FOR RISK-ADJUSTED PERFORMANCE OVER FIVE YEARS

The top performers to December 31, 2020 on a risk-adjusted basis in the multi-asset and real estate sectors, plus the largest other ASISA sectors based on market capitalisation. The PlexCrown Fund Rating methodology, which incorporates risk-adjusted returns and consistency of performance, is used to rate and rank funds for these awards. To qualify for a rating, a fund must have a return history of at least five years in a sub-category or sector with at least five qualifying funds.

Methodology: The PlexCrown system combines risk-adjusted returns based on performance statistics and ProlifeData with standard risk measures, consistency measures, and measures of downside risk and managerial skill. Performance over five-year and three-year periods are taken into account.

-  Best South African Multi-Asset Low Equity Fund on a Risk-Adjusted Basis
Absa Inflation Beater Fund
-  Best South African Multi-Asset Medium Equity Fund on a Risk-Adjusted Basis
Kagiso Protector Fund
-  Best South African Multi-Asset High Equity Fund on a Risk-Adjusted Basis
Gryphon Prudential Fund
-  Best South African Multi-Asset Income Fund on a Risk-Adjusted Basis
Sharenet BCI Income Plus Fund
-  Best South African Interest-Bearing Short-Term Fund on a Risk-Adjusted Basis
Prescient Yield QuantPlus Fund
-  Best South African Interest-Bearing Variable-Term Fund on a Risk-Adjusted Basis
Absa Bond Fund
-  Best South African Real Estate Fund on a Risk-Adjusted Basis
Harvard House BCI Property Fund
-  Best (SA-Domiciled) Global Equity General Fund on a Risk-Adjusted Basis
Anchor BCI Global Equity Feeder Fund
-  Best (SA-Domiciled) Global Multi-Asset Low Equity Fund on a Risk-Adjusted Basis
STANLIB Global Balanced Cautious Feeder Fund
-  Best (SA-Domiciled) Global Multi-Asset High Equity Fund on a Risk-Adjusted Basis
Ninety One Global Strategic Managed Feeder Fund
-  Best (SA-Domiciled) Global Multi-Asset Flexible Fund on a Risk-Adjusted Basis
MI-PLAN IP Global Macro Fund
-  Best (SA-Domiciled) Global Real Estate Fund on a Risk-Adjusted Basis
Reitway BCI Global Property Feeder Fund
-  Best (SA-Domiciled) Worldwide Multi-Asset Flexible Fund on a Risk-Adjusted Basis
Select BCI Worldwide Flexible Fund

RAGING BULL AWARDS

The top performing funds over three years (outright performance) and five years (risk-adjusted performance) to December 31, 2020.

STRAIGHT PERFORMANCE OVER THREE YEARS

-  Best South African Equity General Fund
Fairtree Equity Prescient Fund
-  Best South African Interest-Bearing Fund
Absa Bond Fund
-  Best (SA-Domiciled) Global Equity General Fund
IP Global Momentum Equity Fund
-  Best (FSCA-Approved) Offshore Global Equity Fund
Anchor Global Equity Fund

RISK-ADJUSTED PERFORMANCE OVER 5 YEARS

-  Best South African General Equity Fund on a Risk-Adjusted Basis
Fairtree Equity Prescient Fund
-  Best South African Multi-Asset Equity Fund on a Risk-Adjusted Basis
Absa Inflation Beater Fund
-  Best South African Multi-Asset Flexible Fund on a Risk-Adjusted Basis
Long Beach Flexible Prescient Fund
-  Best (FSCA-Approved) Offshore Global Asset Allocation Fund on a Risk-Adjusted Basis
PSG Wealth Global Flexible Fund of Funds

MANAGER OF THE YEAR AWARDS

The unit trust managers with the most impressive and most consistent overall performance across their families of funds over five years to December 31, 2020, taking into account all factors (performance, risk management and consistency).

Methodology: The awards are based on the highest average PlexCrown rating for the suite of funds per major asset class managed by each manager, with weights being applied to asset classes.

-  Offshore Manager of the Year
T. Rowe Price
-  South African Manager of the Year – 3rd Place
H4 Collective Investments
-  South African Manager of the Year – 2nd Place
MI-PLAN
-  South African Manager of the Year
Ninety One