Interactive
PORTFOLIOS

MANAGED INVESTMENT PORTFOLIOS

We believe a disciplined and systematic process reduces risk and delivers consistent results.

About us

Who we are

Interactive Portfolios is an independent discretionary fund management service provider (CAT II FSP) providing investment services to independent financial advisors.

Our mission

To help investors reach their financial goals. We do this by working with financial advisors to maintain and build investment portfolios suited to their business and their client's investment objectives.

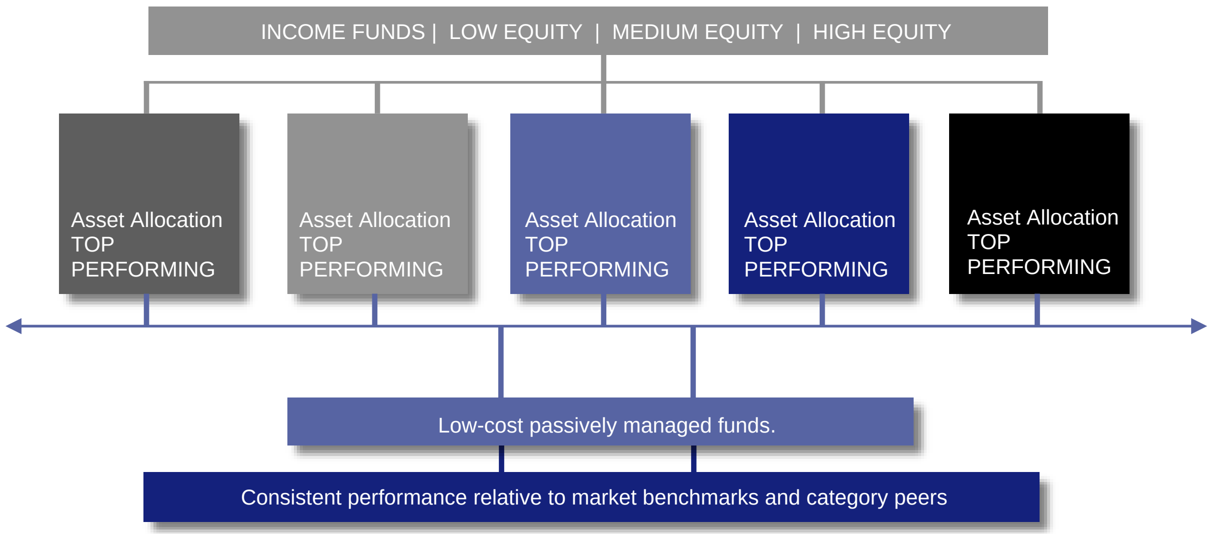
Our history

Interactive Portfolios is an owner managed business founded in 1947. The current CEO Wayne Rosenberg has over 50 years industry experience. Wayne is well known for his success as CEO of the JSE listed financial services group Appleton LTD, and was a key stakeholder in the merger with PSG in 2003.

What separates us

Is our unique asset allocation tracker methodology which continuously tracks the asset mix of top performing fund managers. Portfolios are built with low-cost passively managed funds. We fiercely adopt a passive investment management style across all portfolios. This philosophy delivers consistent performance relative to market benchmarks and category peers, and at a lower cost to the client.

ASISA CATEGORIES



Helping the advisor earn more

By adopting a partner relationship, the skillsets of both the advisor and investment consultant are merged to provide a personalised offering to the client. The combined efforts allow for shared revenue.

Portfolio range

Our risk rated portfolios are exclusively available to our partnered advisors on multiple platforms and designed for a variety of investment products. The portfolios further range from income focused to growth-orientated portfolios.

Risk rated portfolios

Income

Conservative

Balanced

Growth

Platforms

Ninety One

momentum investments | wealth

glacier by Sanlam

DMA MONEY BETTER

Tailored investment products

DISCRETIONARY	NON- DISCRETIONARY (Reg 28 compliant)
Local	Pension preservation
Offshore	Provident preservation
Tax-free savings	Retirement annuity
Endowment or sinking funds	
Shariah	

We have no minimum investment values, so portfolios are available to a wider range of advisors and their clients.

Support

The relationship between the advisor and client is key, and we work closely with your advisory practice so that clients' investment needs are met.

- Each advisor has a dedicated relationship manager
- Advisors can work alongside investment consultants to ensure personalised plans are delivered to each client
- Portfolio managers are available to communicate with advisors on the financial markets and portfolio performances

We provide advisors with

- More cost-effective portfolios for your clients. Low-cost ETF portfolios
- Freeing up admin burdens - ease of switching (discretionary CAT2 licensing)
- Improving compliance – Treating Customers Fairly
- Designed for advisors to incorporate needs-based investment planning

Solution benefits

- Monthly factsheets of portfolios
- Analyst reports
- Quarterly newsletters and portfolio justifications
- All these reports are available to be white labelled with your company brand

Interactive Portfolios Investment Process

We adopt a unique investment process whereby our analyst team continuously track the asset allocation of top performing fund managers around the globe and within South Africa. This is known as the “asset allocation tracker”.
Portfolios are then built by using low-cost index ETF’s or mutual funds. The rebalancing of these portfolios occurs each quarter according to the reviewed “asset allocation tracker”.

Understanding where other top performing professionals are allocating capital prompts a process for consistent long-term results. ETF’s provide a well-diversified and a low cost solution for clients.

Strategic asset allocation

The management team set strategic guidelines for assets mixes in each risk rated portfolio

Asset allocation Tracker

The committee continuously analyse the asset allocation of various top rated asset managers

Building Blocks

We construct portfolios comprising of well researched ETF’s and low cost index funds

Rebalance

Each quarter, portfolios are rebalanced back to the tactical asset allocation tracker

Contact us

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