

# Welcome to **INTERACTIVE**



Advisor **First.** Investor **Always.**



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## ABOUT US

We are an independent Discretionary Fund Management service provider (Category II FSP), dedicated to offering both investment management and value added services to financial advisors.

**At our core,  
we are more than just asset  
managers; we are partners in your  
practice.**

### 1 APPROACH

Our entire approach is centered around financial advisors & their success.

### 2 OFFERING

We offer unit trusts, share portfolios & ETF portfolios, personalised for your clients & practice.

### 3 THE DIFFERENCE

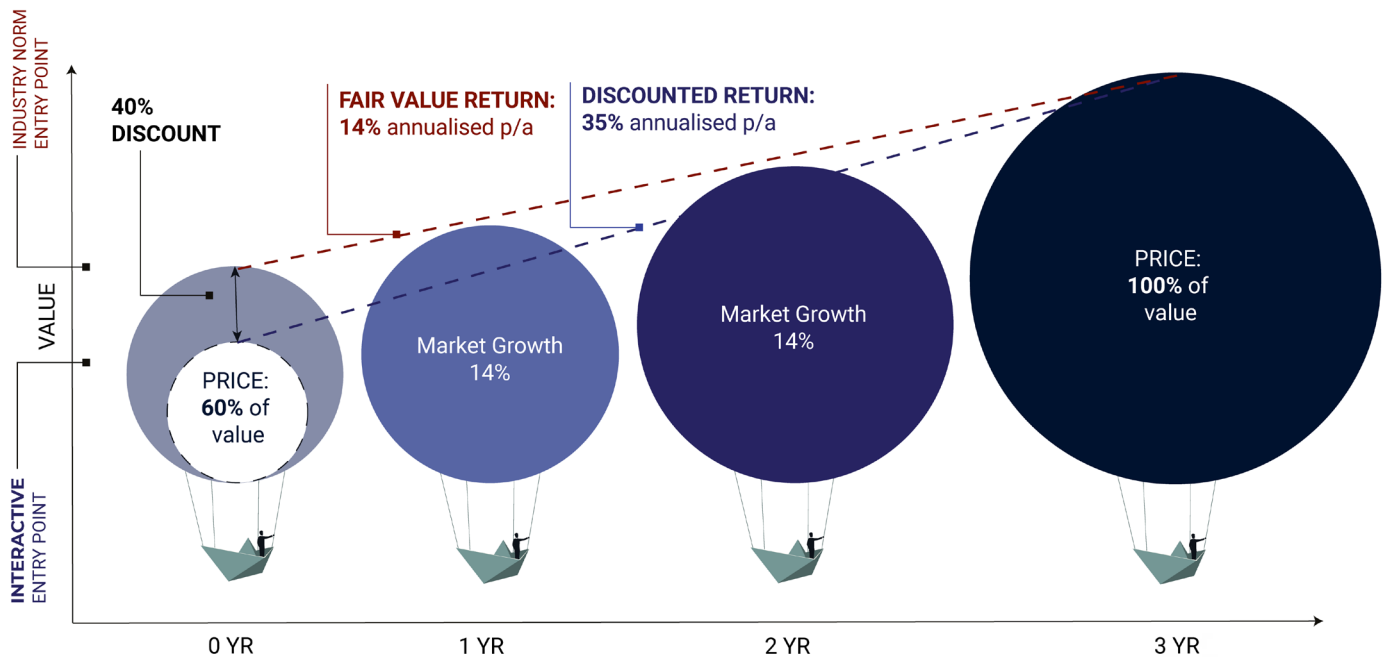
With complimentary para-planning, investment analysis & administrative support, we not only lighten your workload & save you time, but also enhance your capacity to grow your revenue.

A mutually beneficial relationship - focusing on **your success** ensures **ours**.



# Investing for the long-term

Buying **quality assets** at bargains or **reasonable prices** to their fair value.



## Values



Our clients & people first.



Openness, communication & accountability.



Shareholders and staff are co-invested alongside our clients.



Long lasting relationships built on honesty, integrity & trust.

## A BIT OF 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.

### HISTORIC JOURNEY

1947



The Company was first registered as Menblack in **1947** as the business of Arthur Menell. The enterprise focused in the realm of international securities arbitrage, operating primarily in the listed shares of the family business of mining giant Anglovaal Industries.

1991

In **1991** the business was merged to form Irish Menell Rosenberg which focused to a large extent on Institutional trading. Shortly thereafter the combined business evolved into the trading in Fixed Interest Government Bonds and Index Futures.

2022



Subsequent to the sale of Appleton to PSG in **2022** the business of Interactive Portfolios was established and specializes in the management of Unit Trusts and in servicing of independent Financial Advisers.

1972

In early **1972** the business was renamed to form the merged group of Menell Jack Hyman Rosenberg & Co. which offered dedicated private client stockbroking and investment advisory services.

1997



In March **1997** the business was merged with Appleton Wealth Managers to create The Appleton Group which shortly thereafter was listed on the JSE. The Appleton Group eventually delisted and sold to what ultimately became what is today the listed business of PSG Konsult.



### DID YOU KNOW

The business of Interactive Portfolios is currently under the stewardship of Managing Director Joseph Rosenberg who is now the fifth descendant of Alphonz Sprinz who was an original founding member of the JSE.

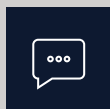


## MEET OUR **INVESTMENT TEAM**



**WAYNE ROSENBERG**

CEO

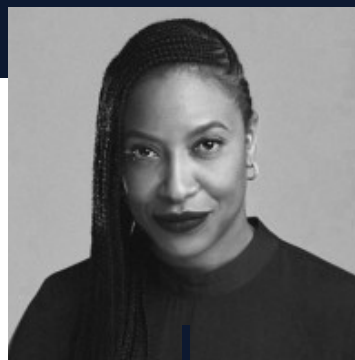


Our business is simple, we help investors reach their financial goals. We do this by working with financial advisors to maintain and build investment portfolios suited to their business and client's investment objectives.



**JOSEPH ROSENBERG**

MANAGING DIRECTOR



**SHARON RUTENDO**

ADMINISTRATION



**MATTHEW BURNS**

BUSINESS DEVELOPMENT  
MANAGER



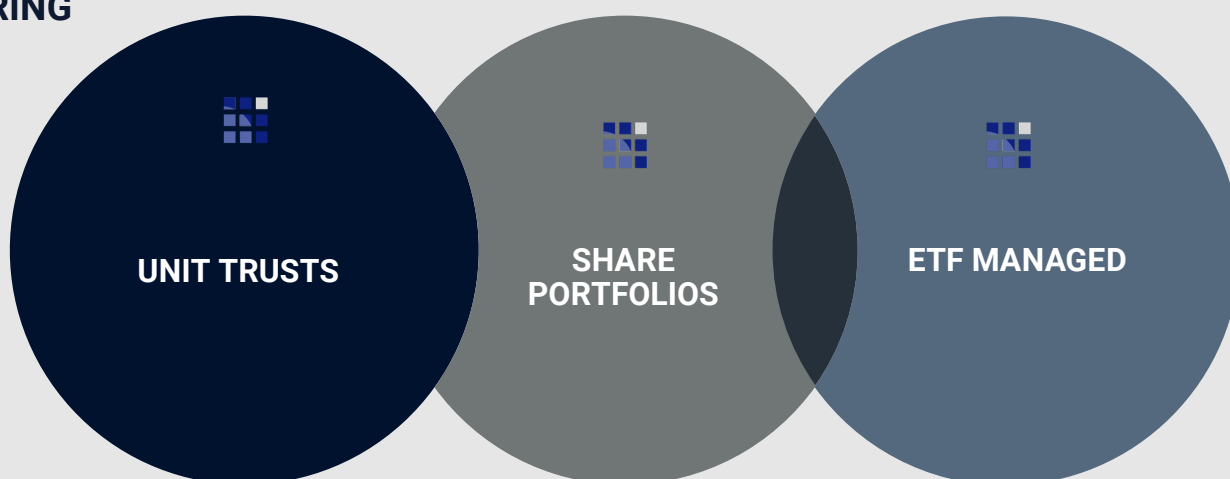
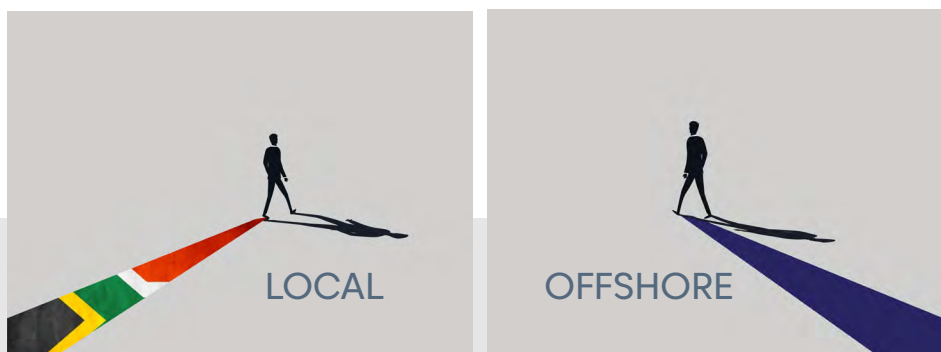
**MICHAEL MESSIAS**

PORTFOLIO ANALYST

## INVESTMENT MANAGEMENT

Interactive offer a range of investments managed according to the investors objectives and risk profile. All portfolios are risk rated.

### INVESTMENT OFFERING



### AVAILABLE ON THESE PLATFORMS

**DMA**  
MONEY BETTER

**momentum**  
investments

**INN8**  
INVEST

**ALLAN GRAY**

**Prescient**

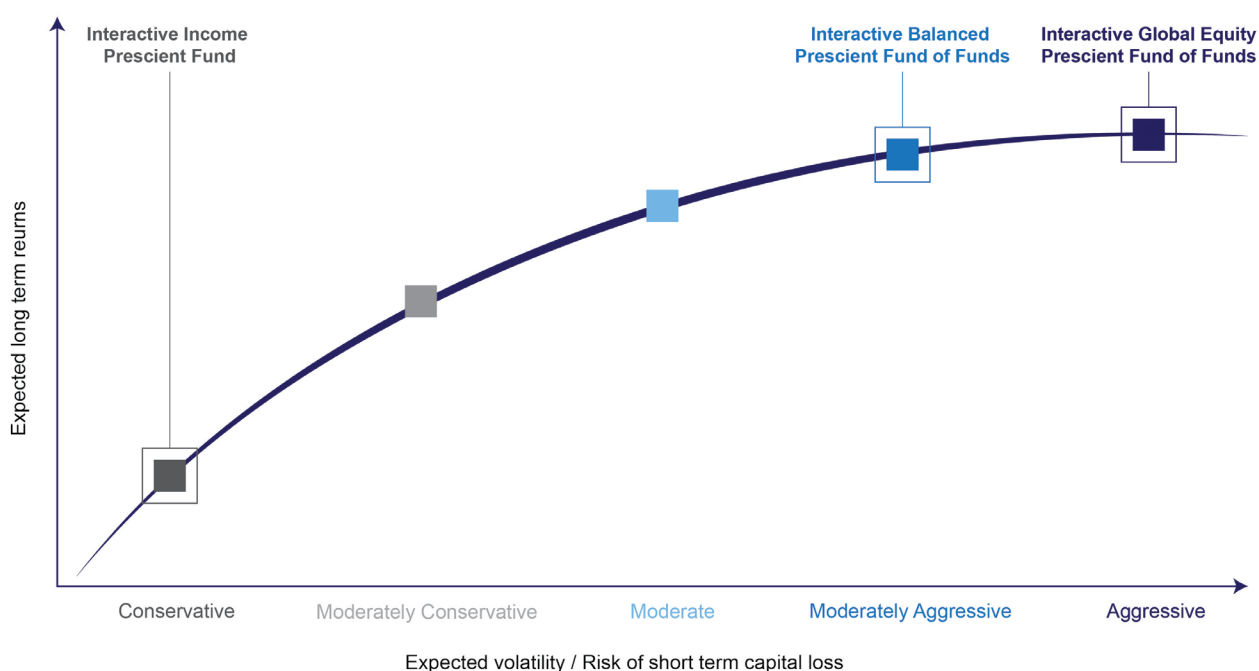
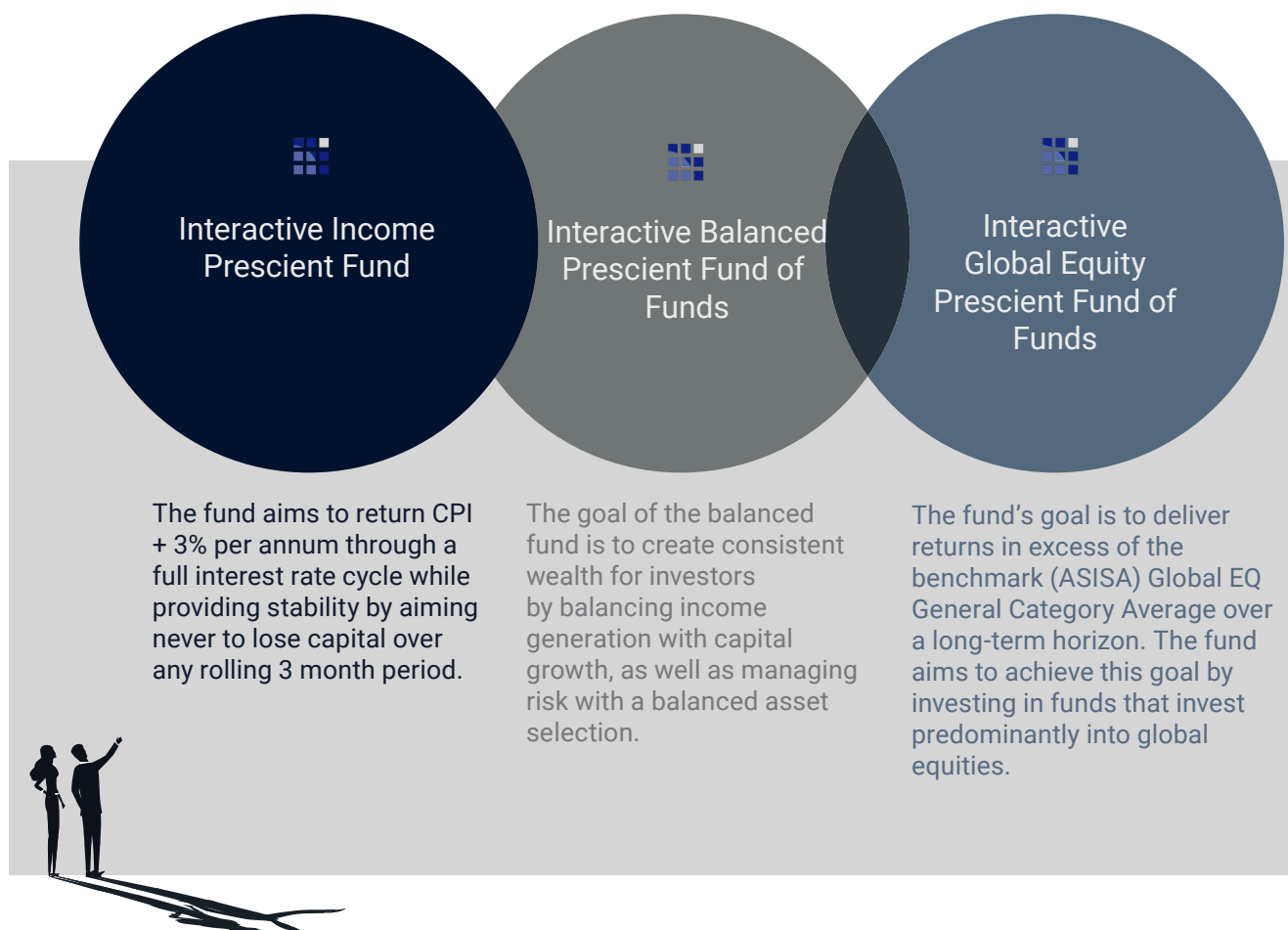
**Ninety One**

**Swissquote**  
THE SWISS LEADER IN ONLINE BANKING

**glacier**  
by Sanlam

## UNIT TRUSTS

Interactive Portfolios manage 3 unit trusts to provide investors with a simple selection of portfolios to meet different local and offshore investment objectives.





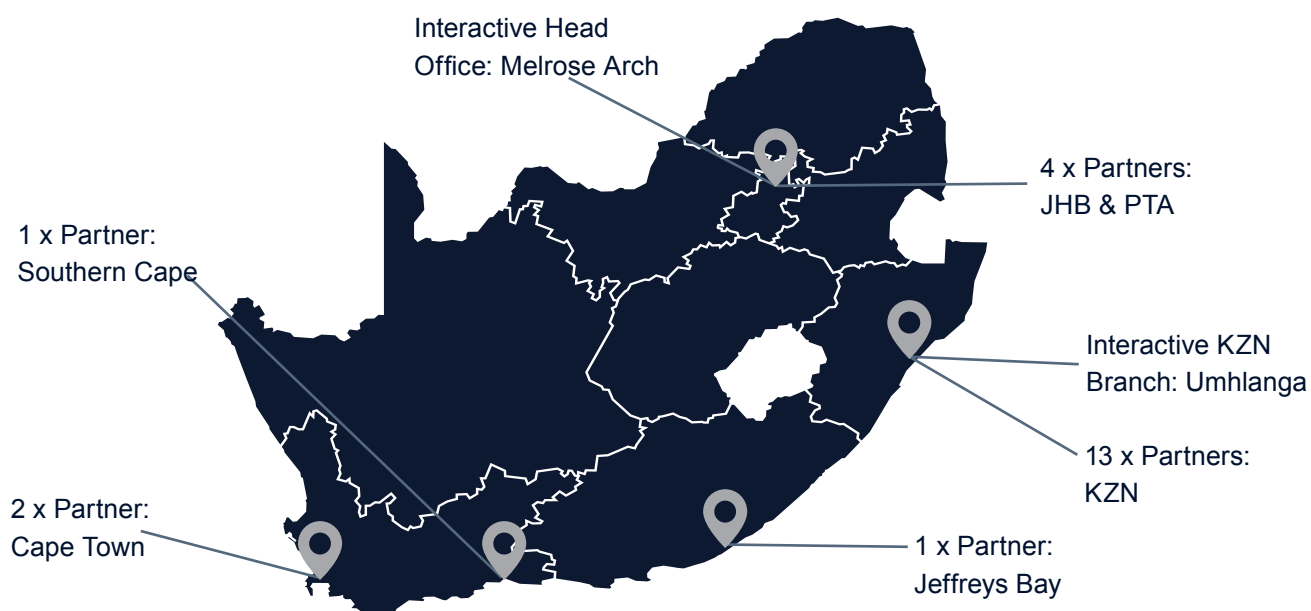
## THE DIFFERENTIATOR

VALUE ADDED SERVICES (at no extra cost)



## INTERACTIVE FOOTPRINT

Partners, Advisors & Partners AUM



Interactive Portfolios AUM: 1 Billion +

## CLIENT TESTIMONIALS



### ALISTAIR BROWN

Brown & Associates Financial Advisor Services (Pty) Ltd

Interactive has significantly enhanced our investment advisory function. They are more than just asset managers; they are true partners who act in the best interests of both our practice and our clients. Their consistent support for every client and genuine care for outcomes have been invaluable. Not only have they saved us time and resources, but they've also helped us increase our revenue. We believe that most financial advisors would greatly



### ALLAN SPIES

Apex Financial Consulting (Pty) Ltd

Interactive's reliability and unwavering integrity have set a new standard for our practice. Their impressive track record demonstrates a commitment to excellence and ethical practices. With a client-centric approach, Interactive ensures that our clients' needs are always prioritized, resulting in enhanced client satisfaction and loyalty.



### CLAUDE ROBYN

CFSR Investments Holdings

Interactive's emphasis on long-term investing and sustainability showcases a dedication to responsible practices and effective risk management. With a client-centric approach, they prioritize the needs and goals of each individual, ensuring a personalized and impactful experience. Their spirit of innovation and embrace of technology further solidify their position as a forward-thinking and dynamic organization.



## GET IN TOUCH WITH US

### JOHANNESBURG

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010 745 1666

**WEB**

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### DURBAN

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