

Welcome to **INTERACTIVE**

 Financial Advisor Brochure

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



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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.



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

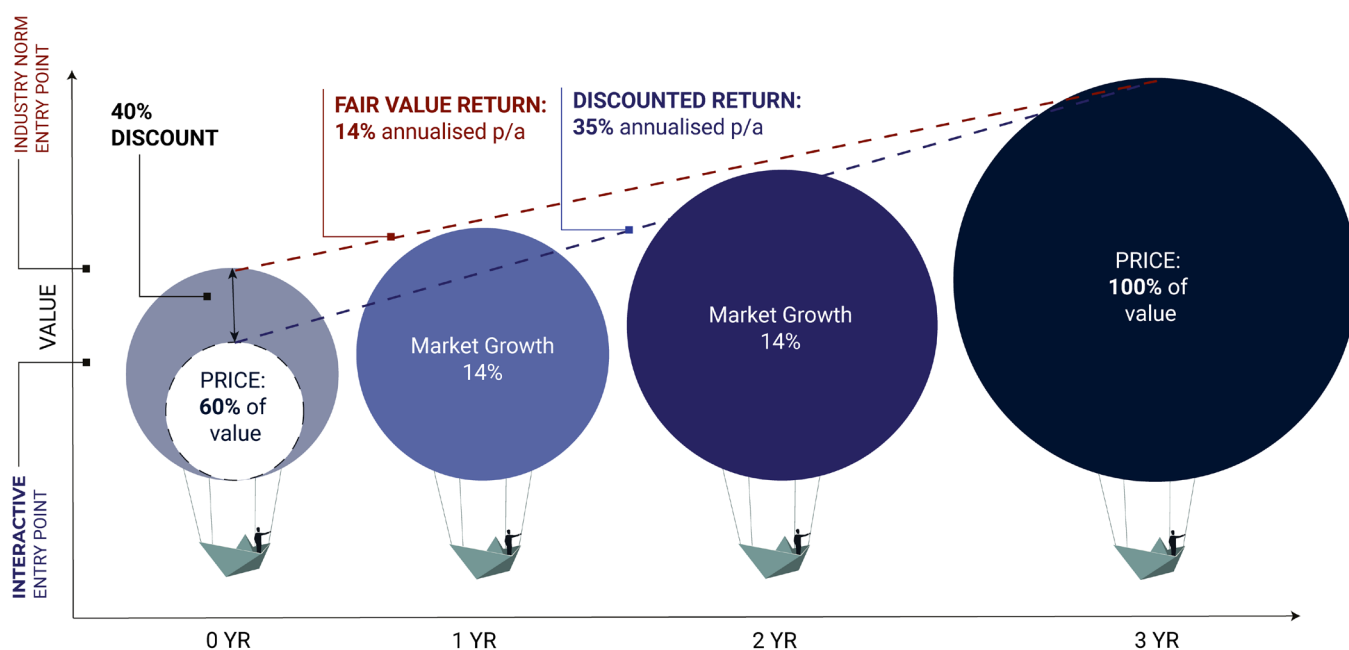


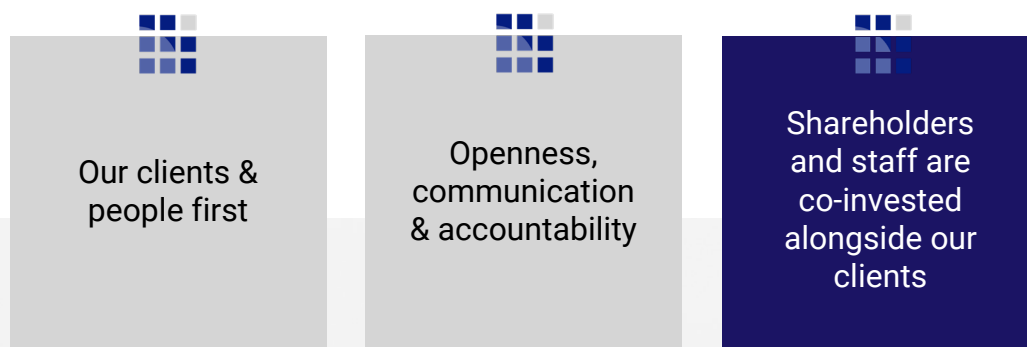
A market
downturn
doesn't bother
us. It is an
opportunity to
increase our
ownership
of great
companies
with great
management
at good prices.

- Warren Buffet

Investing for the long-term

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

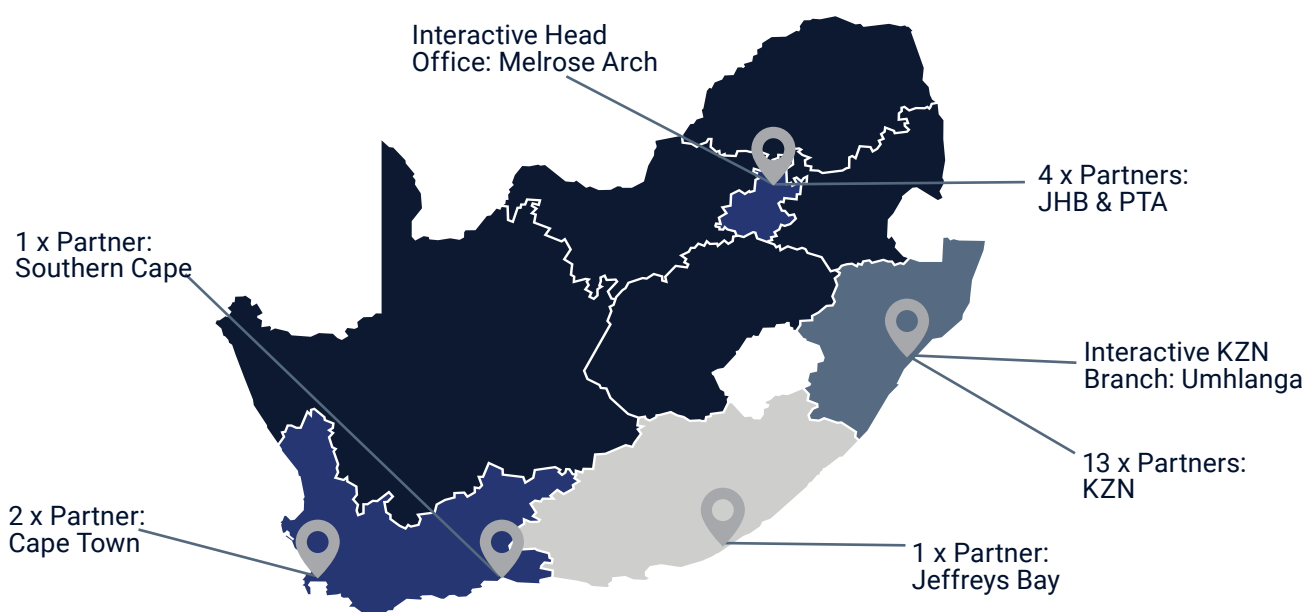




Long lasting relationships built on honesty, integrity and trust.

Interactive Footprint

Partners, Advisors & Partners AUM



A Bit of History

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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.

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.

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.

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.

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.

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.

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.

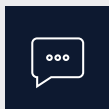
Meet Our Investment Team

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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



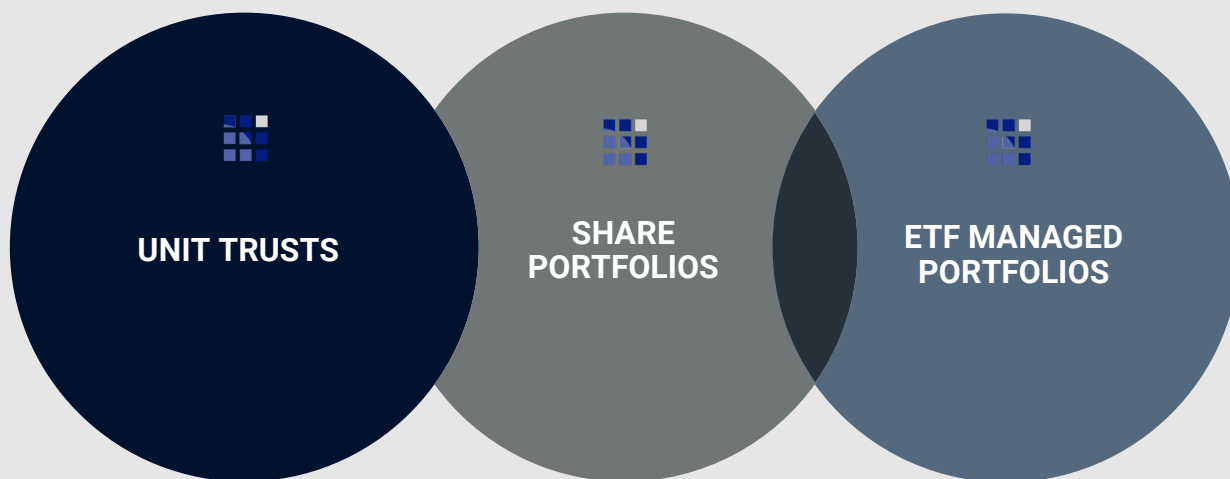
MICHAEL MESSIAS
PORTFOLIO ANALYST

Investment Management

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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

momentum
investments

DMA
MONEY BETTER

INN 8
INVEST

ALLAN GRAY

Prescient

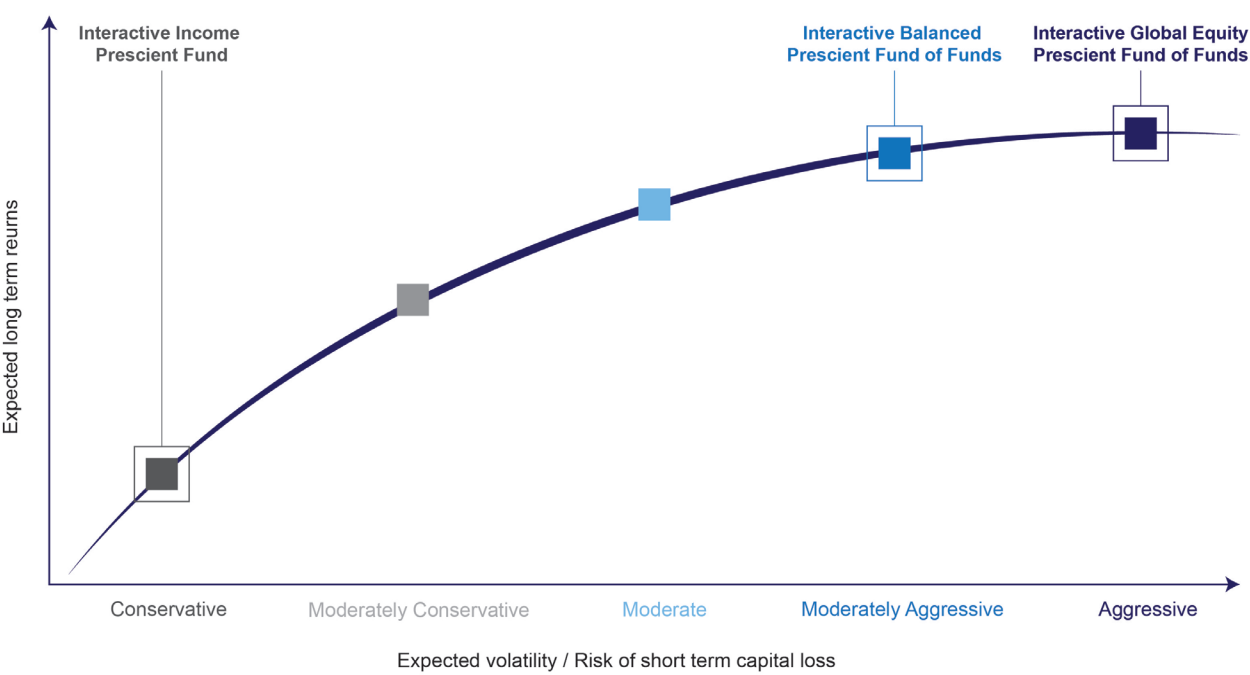
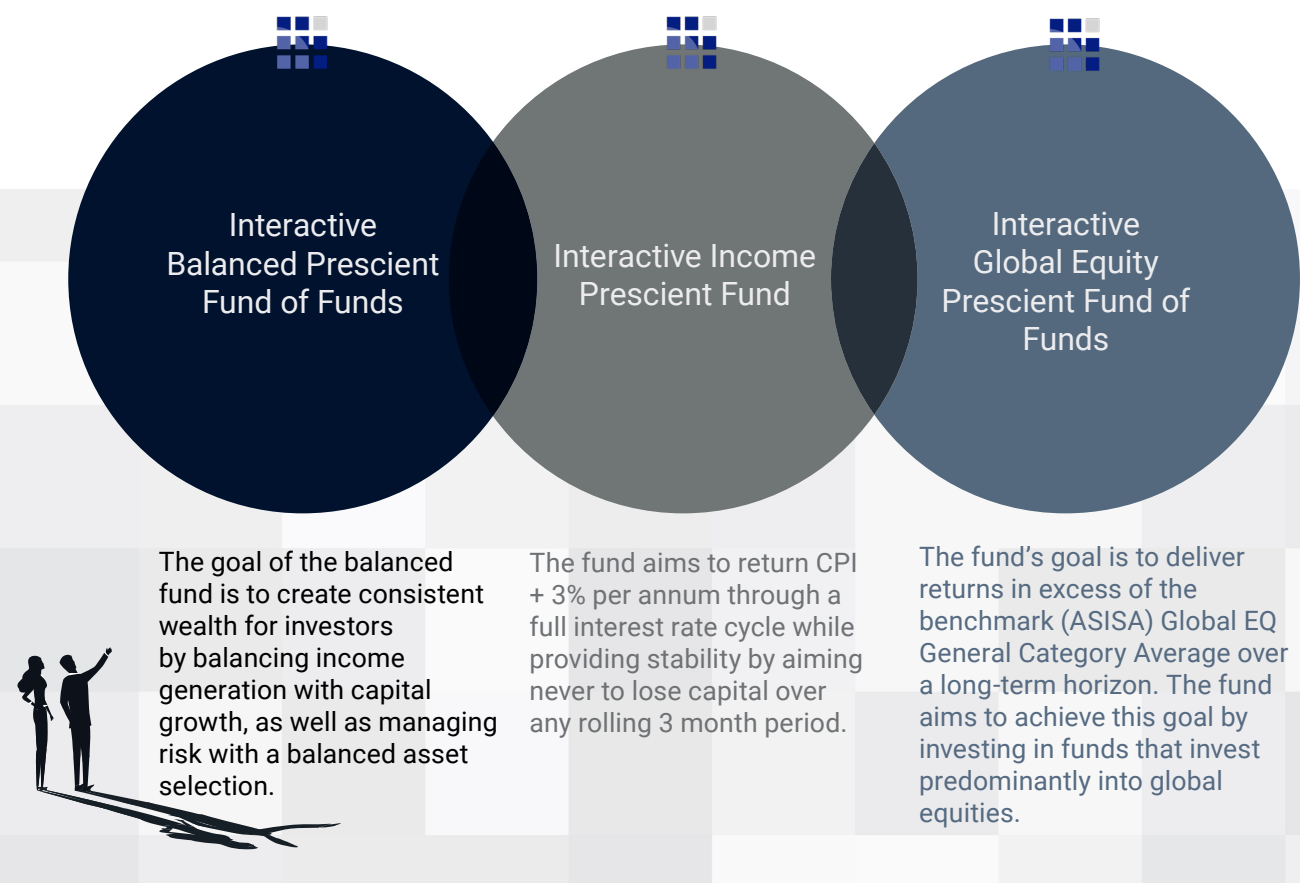
Ninety
One

 **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.



Value added services (at no extra cost)



1
RECORD OF ADVICE
PROPOSALS



2
ATTENDING CLIENT
MEETINGS



3
PARA-PLANNING
INHOUSE CFP'S



4
REPORTING &
COMMUNICATION
TO CLIENTS



5
BESPOKE
INVESTMENT
ANALYSIS



6
ADMINISTRATIVE
SERVICES

Interactive Portfolios AUM: 1 Billion +

Client Testimonials

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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 benefit from their services.



ALLAN SPIES

Apex Financial Consulting (Pty) Ltd

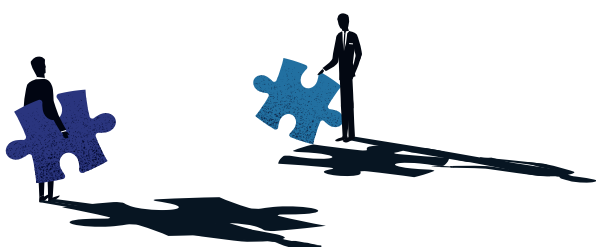
Interactive's reliability and unwavering integrity have set a new standard for our practice. Their impressive track record demonstrates a commitment to excellence and ethical practices. With a client-centric approach, Interactive ensures that our clients' needs are always prioritized, resulting in enhanced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



Connect With Us

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