

Batseta Year-End Seminar (Hybrid)

Radisson Hotel & Convention Centre, Johannesburg, O.R. Tambo/ ZOOM

22 November 2022

[Momentum Investments
Presentation](#)

[Old Mutual Investment Group
Presentation](#)

[Mazi Asset Management
Presentation](#)

[ASISA Academy Presentation](#)

Topics discussed:

- Enhancing social outcomes through investment in Student accommodation (Momentum Investment)
- Looking beyond the noise – How factor investing can be beneficial to your portfolio (Old Mutual Investment Group)
- Investing is simple, but not easy (Mazi Asset Management)
- The CRISA Code (ASISA Academy)

Speakers:

- Godfrey Aldertyn from **Momentum Investments**
- Craig Chambers from **Old Mutual Investment Group**
- Shaun Bruyns from **Mazi Asset Management**
- Douglas Davids from **ASISA Academy**



Batseta Year-End Seminar (Hybrid)

Blaauwberg Beach Hotel/ ZOOM

10 November 2022

[RisCura Presentation](#)

[Old Mutual Corporate
Presentation](#)

[Ninety One Presentation](#)

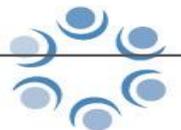
[ASISA Academy Presentation](#)

Topics discussed:

- Regulation 28 changes – considerations for Funds (Old Mutual Corporate)
- ESG Measurement and Reporting: The Essentials (RisCura)
- Opportunity beckons with increased offshore exposure, but it needs to be harnessed with skill (Ninety One)
- The CRISA Code

Speakers:

- Martin Poole from **Old Mutual Corporate**
- Susanna Yang, Brooke Leaf-Wright and Chris Rezelman from **RisCura**
- Unathi Loos from **Ninety One**
- Sunette Mulder from **ASISA Academy**



Batseta Free Webinar

03 November 2022

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Topic: Unclaimed Benefits

Speaker: Elio E'Silva, Head – Direct Corporate Solutions @AlexForbes & Fiona Rollason, Group Head: Legal and Group Insurance @Alex Forbes.

Topic Summary:

The Discussion Paper aims to build on the work conducted by the National Treasury in respect of unclaimed retirement benefits, to foster debate on how lost accounts and unclaimed assets should be treated in a way that is consistent with the treating customers fairly principles. It, therefore, seeks mainly to improve the extent to which unclaimed assets are reunified with their rightful owners or beneficiaries, and minimize the extent of unclaimed assets in the future. Proposals are also made regarding channeling some of the funds towards positive impact.



Batseta Free Webinar

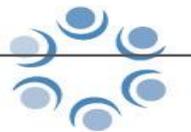
11 October 2022

Topic: A global and local investor perspective on the value of Private Equity in a portfolio: a look at the remarkable rise of private equity allocations globally and what lessons could be relevant for SA

Speaker: Ria Papier, Client Director: Old Mutual Private Equity @Old Mutual Alternative Investments, Soyisile Mokweni Executive Chairman @Consolidated Retirement Fund, Lebo Thubisi, Head: Manager Research @Alex Forbes, Svenja Becker, Co-Founder & Managing Partner @Moravia Capital Investments

[Download Script](#)

Topic Summary: This is a timely topic in light of the recently tabled amendments to Regulation 28 of the Pension Funds Act in Parliament. Join this panel for a robust discussion on the increased popularity of private equity allocations globally, what this has meant in the global context and what lessons could be relevant for South Africa. We discuss, including the perspectives from both global and local investors, the benefits of adding private equity to a diversified portfolio and address the challenges typically raised with investing in the asset class.



Batseta Free Webinar

20 September 2022

<p>Watch Recording</p>	<p>Topic: The Building Blocks of Venture</p> <p>Speaker: Amrish Narrandes, Head: Private Equity & Venture Capital and Maseabi Marageni, Head: Business Development @ Futuregrowth Asset Management</p> <p>Topic Summary: We'll take a closer look at Futuregrowth's high growth/venture investing capability. We will provide a roadmap in terms of the key attributes we find attractive when assessing an investment, and show how the risks can be managed. In addition, we will take you through the journey of how one of our investee companies (Cash Connect) emerged from a business that was in business rescue to a successful venture that has provided its shareholders with extremely attractive returns</p>
<p>Download Presentation</p>	<p>How local and global drivers within our investment environment drive portfolio construction of our investment strategies.</p> <p>Speaker: Jason Swartz, Investment Strategist @Old Mutual Investment Group</p> <p>Topic Summary: Join Jason Swartz, experienced Investment Strategist at Old Mutual Investment Group as he looks at how retirement fund portfolios can be unlocked to ensure we navigate varying external forces, including currency risks to ensure sustainable, long term results for your funds, whilst also being responsible investors of the capital we manage.</p>



Batseta Free Webinar

01 September 2022

<p>Download Presentation</p>	<p>Topic: Taking advantage of the increased flexibility in regulations to further diversify your global portfolio</p> <p>Speaker: Feroz Basa, Head: Global Emerging Markets @Sanlam Investments</p> <p>Topic Summary: Following finance minister Enoch Godongwana’s budget speech announcement that changes to regulation 28 of the Pension Funds Act, due to be published in March, will soon allow pension funds to invest 45% of their assets offshore (up from the previous limit of 30%), Sanlam Investments explores the prospects for global emerging markets in particular and the opportunities that are available to pension funds looking to further diversify their global exposure.</p>
<p>Download Presentation</p>	<p>Topic: Global alternatives - Making the most of your 45%</p> <p>Speaker: Priscilla Kavule and Tom Farrell Partner @Lane Clark & Peacock</p> <p>Topic Summary: As Harry Markowitz said - “Diversification is the only free lunch in investment.” With the option to now allocate close to half of your Fund to global investments, an even greater opportunity has opened to SA investors to balance their portfolios.</p> <p>LCP’s Nobert Fullerton and Priscilla Kavule will explore how Funds can maximise diversification through the global allocation. Leveraging their international expertise, LCP will provide their latest views on global alternatives (with a focus on real assets), whilst weighing up the risks and opportunities that SA investors should consider.</p>



Batseta Free Webinar

16 August 2022

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Topic: Venture Capital 101

Speaker: Tishanya Naidoo, Principal: Venture Capital @27four Investment Managers Ramateu Monyokolo, Trustee @Rand Water Provident Fund

Topic Synopsis: An introduction to Venture Capital

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Topic: Fixed Income & Macro Outlook: Has South Africa escaped the global inflation trend?

Speaker: Adam Furlan, Portfolio Manager @Ninety One

Topic Synopsis: Join Adam Furlan, portfolio manager at Ninety One as he unpacks what this all means for a fixed income portfolio



Batseta Free Webinar

02 August 2022

<p>Download Presentation</p>	<p>Topic: SA Green Finance Taxonomy: What it is in a nutshell</p> <p>Speaker: Chinell Bermosky, Investment Consultant @Old Mutual Corporate</p> <p>Topic Synopsis: The South African National Treasury has released the South African Green Finance Taxonomy_ First Edition (GFT 1st Edition). This session will unpack what it is and the usefulness thereof for asset owners in a nutshell.</p>
<p>Watch Recording</p>	<p>Topic: Reg 28: An opportunity to propel real returns and real impact in SA</p> <p>Speaker: Selina Nalane, Client Director- BBusSci (Hons), Ettienne De Kock, Head: Business Development- BEng (Industrial), Sean Friend, Investment Director: CIO SADC- B.Sc, M.Sc, CFA Charterholder @Old Mutual Alternative Investments</p> <p>Topic Synopsis: The National Treasury recently tabled the amendments to Regulation 28 of the Pension Funds Act in Parliament, concluding that the amendments and allocations will be in effect from January 2023. Join this panel as it unpacks what Treasury is ultimately aiming to achieve with these changes, and the compelling opportunity to align to these outcomes in relation to Infrastructure and Impact Investing in SA.</p>



The role of government bonds as diversifiers of cyclical risk

12 July 2022

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Topic: The role of government bonds as diversifiers of cyclical risk

Speaker: Ugo Montrucchio, Head of Multi-Asset Investments, Europe, UK & US Balanced @Schroders

Topic Synopsis:

- Government bonds have acted as important stabilisers in portfolios over the past three decades as hedges against growth risk.
- Could they continue to play the same role moving forward if the current inflationary pressures persist?
- Do we need government bonds in our portfolios or where else should we be considering safe haven from here onwards?



Managing global equity from South Africa

17 May 2022

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Topic: Managing global equity from South Africa

Speaker: Andreas van der Horst | Portfolio Manager @ Mazi Management

Topic Synopsis:

Mazi Asset Management demonstrates how to successfully manage global equities from South Africa. They will share insights on their quality investment style approach, the benefits of a buy-and-hold philosophy, the ongoing use of data analytics to identify and manage risk in a concentrated global fund, and the benefits of a diverse team and a unique culture

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Topic: Agricultural financing and its challenges

Speaker: Johan Fourie | Corporate Legal Advisor @ 27four Investment Managers

Topic Synopsis:

The availability of financing for South African agricultural producers



The Value Opportunity

12 April 2022

Topic: The Value Opportunity

Speaker: Liam Nunn | Fund Manager, Equity Value @Schroders

Topic Synopsis:

The last few years have been undeniably tough for value. However, this year, the debate over value and growth investment styles has been less clear cut, after periods of eye-catching relative outperformance for value. Whilst value is seeing somewhat of a renaissance, the gap in fundamental valuation between the most highly rated and the least highly rated shares globally remains at extreme levels, which we believe, is where the opportunity lies.

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Credit as the tool for infrastructure investments

12 April 2022

Topic: Credit as the tool for infrastructure investments

Speaker: Steven Loubser | Portfolio Manager @ Ninety One

Speaker: Stephen Naidoo | Co-Portfolio Manager @ Ninety One

Topic Synopsis:

What are the infrastructure investment opportunities that currently exist in SA and the rest of Africa? What risk and return signatures do asset classes offer? Join Steven Loubser, portfolio manager and Stephen Naidoo, co-portfolio manager at Ninety One as they outline the investment case for credit infrastructure investments and its importance.

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Asset Allocation and Solutions Investing – Impact of the new 45% max in foreign assets

22 March 2022

[Download Presentation](#)

Topic: Practical proposals for quick wins in the commercial umbrella fund market

Speaker: Urvesh Desai | Portfolio Manager @Old Mutual Investment Group (MacroSolutions)

Topic Synopsis:

The recent change to allow investors to invest up to 45% in foreign assets is a significant change to the investing environment. How does this impact the asset allocation decisions you have to make and how you should be thinking about investing globally?



Practical proposals for quick wins in the commercial umbrella fund market

22 March 2022

Topic: Practical proposals for quick wins in the commercial umbrella fund market

Speaker: David Gluckman | Chairman of the Board @ Sanlam Umbrella Fund

Speaker: Steven Nathan @Founder at 10X

Topic Synopsis:

Commercial umbrella funds are set to play an increasingly important role in restructuring the retirement funds industry for the ultimate benefit of members. This much is clear from the massive consolidation trend already underway, as well as more recent Government pronouncements. David Gluckman (Chairman of the Sanlam Umbrella Fund Board) and Steven Nathan (Founder of 10X) have been two of the leading figures in this space over the past decade, and both have the significant practical experience to assess likely quick wins that can benefit members. In this webinar, they will unpack the key industry trends, the likely way forward from Government, as well as the product, features that are likely to win over the next few years in a highly competitive market. David will also highlight key learnings from his 2 years as Chairman of the Sanlam Umbrella Fund Board, and the specific strategies that Sanlam has planned in this space.

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Infrastructure Investing: Opportunities and Risks

28 February 2022

[Download Presentation](#)

Topic: Infrastructure Investing: Opportunities and Risks

Speaker: Jason Lightfoot | Portfolio Manager @ Futuregrowth Asset Management

Topic Synopsis:

Jason will take you through the risks and opportunities you can expect when investing in this sector.



Webinar Part 1 | The case for Infrastructure

28 February 2022

Topic: Webinar Part 1 | The case for Infrastructure

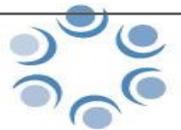
Speaker: Sinenhlanhla Sine Zulu | Investment Specialist @ Ninety One

Speaker: Nathaniel Micklem | Portfolio Manager @ Ninety One

Topic Synopsis:

What is the infrastructure opportunity in South Africa and how can allocators play a role in financing its development? As alternative investments are becoming increasingly popular, investors have to expand their investment opportunity set, given the challenging outlook for traditional asset classes. Join Nathaniel Micklem, portfolio manager and Sine Zulu, investment specialist at Ninety One as they unpack infrastructure and frame the investment opportunity.

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Staying invested – why should you care?

08 FEBRUARY 2022

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Topic: Staying invested – why should you care?

Speaker: Theo Terblanche | Executive Head of Investment Management @Momentum Investments

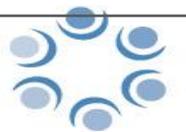
Topic Synopsis:

We often hear investors should ‘stay invested’. But why?

Members making too many interfering decisions in their retirement plans at the wrong points in time, albeit seemingly for logical reasons, can be extremely detrimental in the longer term.

Staying invested, however, sounds easier than it really is, due to our inherent desire to control and manage our investment outcome.

Theo Terblanche, Executive Head of Investment Management at Momentum Investments, will discuss why staying invested is important and why trustees should care.



WORKSHOP ON THE RELEASE OF TWO RETIREMENT REFORM DISCUSSION PAPERS FOR PUBLIC COMMENT: PART TWO

02 FEBRUARY 2022

Topic: Workshop on the release of two retirement reform discussion papers for public comment: part two

Hosts: Kobus Hanekom, Jolly Mkorosi and Frans Phakgadi- Board Directors @ Batseta

Topic Synopsis:

These sessions will accommodate the commercial funds, the employer sponsored funds and the industry funds to meet separately in order to help develop a response to the proposals that are aligned with their unique needs and requirements.

Should you have strong views on any of the proposals please let us know beforehand. If you would like an opportunity to address a particular forum on the 2nd you are also invited to let us know in advance by emailing us on bianca@batseta.org.za

Session Details

Industry Funds - 09h00-11h00
Employer sponsored Funds - 11h00-13h00
Commercial Funds - 13h00-15h00

[Download Presentation](#)

[Watch Workshop Recording](#)



WORKSHOP ON THE RELEASE OF TWO RETIREMENT REFORM DISCUSSION PAPERS FOR PUBLIC COMMENT

26 January 2022

[Two-Pot System Discussion
Presentation](#)

[Governance Commercial Funds
Presentation](#)

[Implications for employer
sponsored standalone funds
Presentation](#)

[Watch Workshop Recording](#)

Topic: Workshop on National Treasury Proposed Retirement Reforms

Hosts: Radesh Maharaj-Board Chairperson at Batseta and Kobus Hanekom Board Director @ Batseta

Topic Synopsis:

On 14 December 2021, National Treasury published two important papers for comment by the end of January 2022

- The governance of Umbrella Funds
- The two pot system

The proposals contained in these papers will have a significant impact on all funds, not just umbrella funds.

We invite you to attend the Batseta scheduled workshop to discuss these proposals (and the comments received), and finalise the Batseta comment.

