16 August 2022

Download Presentation	**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

16 August 2022

Download Presentation	**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.

02 August 2022

Download Presentation	**Topic: SA Green Finance Taxonomy: What it is in a nutshell** **Speaker: Chinell Bermosky, Investment Consultant, Old Mutual Corporate** **Host: Sipho Sidu, Principal Officer, Sala Pension Fund** **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.

02 August 2022

Watch Recording	**Topic: Reg 28: An opportunity to propel real returns and real impact in SA** **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 **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.

12 July 2022

Download Presentation	**Topic: The role of government bonds as diversifiers of cyclical risk** **Speaker: Ugo Montrucchio, Head of Multi-Asset Investments, Europe, UK & US Balanced |Schroders** **Host: Anne-Marie D'Alton | Batseta Council of Retirement Funds for South Africa** **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?

17 May 2022

Download Presentation	**Topic: Agricultural financing and its challenges** **Speaker: Johan Fourie | Corporate Legal Advisor at 27four Investment Managers** **Host: Kgomotso Ramokala | Principal Officer at Telkom Retirement Fund** **Topic Synopsis:** The availability of financing for South African agricultural producers

17 May 2022

Download Presentation	**Topic: Managing global equity from South Africa** **Speaker: Andreas van der Horst | Portfolio Manager at 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

12 April 2022

Download Presentation	**Topic: The Value Opportunity** **Speaker: Liam Nunn | Fund Manager, Equity Value at Schroders** **Host: Moabi Ditsheho | CPEO at Mafikeng City Council Pension Fund** **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.

12 April 2022

Download Presentation	**Topic: Credit as the tool for infrastructure investments** **Speaker: Steven Loubser | Portfolio Manager at Ninety One** **Speaker: Steven Naidoo | Co-Portfolio Manager at Ninety One** **Host: Jolly Mokorosi | Board Director at Batseta** **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.

22 March 2022

Download Presentation	**Topic: Asset Allocation and Solutions Investing – Impact of the new 45% max in foreign assets** **Speaker: Urvesh Desai | Portfolio Manager at Old Mutual Investment Group (MacroSolutions)** **Host: Anne-Marie D'Alton | CEO at Batseta** **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?

22 March 2022

Download Presentation	**Topic: Practical proposals for quick wins in the commercial umbrella fund market** **Speaker: David Gluckman | Chairman of the Board at Sanlam Umbrella Fund** **Speaker: Steven Nathan | Founder at 10X** **Host: William Nkutha | Deputy Principal Officer at University of Cape Town Retirement Fund** **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.

28 February 2022

Download Presentation	**Topic: Infrastructure Investing: Opportunities and Risks** **Speaker: Jason Lightfoot | Portfolio Manager at Futuregrowth Asset Management** **Host: Duduza Khosana | Executive Director at Royance Advisory and Consulting Services** **Topic Synopsis:** Jason will take you through the risks and opportunities you can expect when investing in this sector.

28 February 2022

Download Presentation	**Topic: Webinar Part 1 | The case for Infrastructure** **Speaker: Sinenhlanhla Sine Zule | Investment Specialist at Ninety One** **Speaker: Nathaniel Micklem | Portfolio Manager at Ninety One** **Host: Alani Coetzer | Principal Executive Officer & Employee Benefits Lead at Ernst & Young Provident Fund & Batseta** **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.

08 FEBRUARY 2022

Download Presentation	**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

Download Presentation Watch Workshop Recording	**Topic: Workshop on the release of two retirement reform discussion papers for public comment: part two** **Hosts: Kobus Hanekom, Jolly Mokorosi and Frans Phakgadi- Board Directors at 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

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 at 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.