

WORLDWIDE FLEXIBLE PORTFOLIO 2026



INVESTMENTS

PORTFOLIO INSIGHTS

This portfolio seeks to provide a return of 6% above inflation over the long-term. The portfolio can hold approximately 90% in equity, and between 30% and 60% offshore. It provides aggressive exposure to growth assets, combining both local and offshore. It is suited to investors who place emphasis on offshore diversification and long-term capital growth.

PORTFOLIO FACTS



MAIN OBJECTIVE

Capital growth over the long term



BENCHMARK

Inflation +6%



INVESTMENT HORIZON

7 years+



RESTRICTIONS

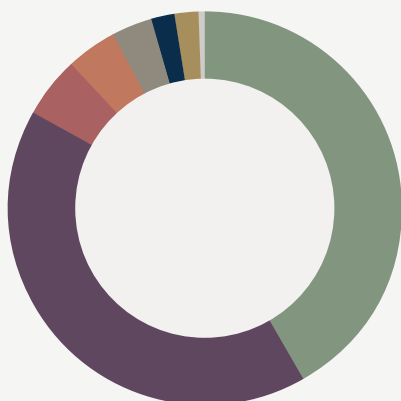
Max offshore 60%, max equity 90%



RISK PROFILE

Aggressive

ASSET ALLOCATION



SA Equities, 41.85%	Global Bonds, 3.27%
Global Equities, 41.33%	SA Property, 2.08%
Global Cash, 5.14%	SA Cash, 1.94%
SA Bonds, 4.06%	Global Property, 0.32%

Source: PPS Investments, as at June 2026.

TOP 10 EQUITY HOLDINGS

FirstRand Bank Ltd	3.2%
Prosus NV	2.9%
Standard Bank Group Ltd	2.2%
Bid Corporation Limited	1.8%
Gold Fields Ltd	1.7%
Anheuser-Busch Inbev SA NV	1.6%
Valterra Platinum Limited	1.5%
MTN Group Ltd	1.4%
Anglogold Ashanti Plc	1.4%
Capitec Bank Holdings Ltd	1.4%

PERFORMANCE

YTD	-0.16%
1 yr	8.57%
2 yrs	12.25%
3 yrs	11.67%
5 yrs	9.20%
7 yrs	11.38%
10 yrs	9.86%

Returns longer than 1 year are annualised.
Annualised returns: The weighted average compound growth rate over the performance period measured.

Source: PPS, Morningstar as at 30 June 2026.

RISK METRICS

Annualised Standard Deviation	9.66%
Percentage of Positive months	66.67%
Maximum Drawdown	-15.33%

Source: PPS Investments, Morningstar as at 30 June 2026.

WHY CHOOSE PPS INVESTMENTS

As a valued PPS member, you already understand the unique power of mutuality. Here at PPS Investments, you'll find solutions designed for the continued growth of your profit share. Operating with an ethos of mutuality, we're part of PPS, a holistic financial services company serving graduate professionals.

Our Retirement Income Solutions are built for professionals by professionals. They're crafted with your unique needs in mind, including a longer life expectancy, to balance income stability, growth, and risk. These expertly designed solutions help your retirement income last a lifetime and beyond, ensuring your next chapter is your best chapter.

BENEFITS YOU CAN ACCESS AT PPS

It's about being part of a community where success is truly better, shared. By investing with us, you could get even more: continue to earn Profit-Share during retirement through **Lifetime Mutuality**, earn additional Profit-Share allocation via **Linking** and the **PPS Profit-Share Cross-Holdings Booster**, and save on administration fees by creating a **Family Network***.



Lifetime
Mutuality



Linking



PPS Profit-Share
Cross-Holdings
Booster



Family
Network

*Members holding qualifying products share in the profit or loss of PPS and past performance is not necessarily indicative of future performance.

GET IN TOUCH

**Speak to your PPS Investments accredited financial adviser.
Alternatively, feel free to contact us directly.**

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Success is better, **shared.**