







PSG Wealth value proposition

Research provided

We regard investment research as part of the PSG Wealth value proposition. Our research demonstrates that we are thought leaders, counsellors, innovators and fiduciaries.

Our PSG Wealth managers benefit from this research in terms of the guidance that is provided on complex investment matters, which often prompts clarification by both our advisers and clients.






Below follows a summary of the research available and where to access the research. For more details please refer to the separate document attached for frequently asked questions and answers.

Topic	Research provided	Audience	Frequency	Origin	Access
Daily report 	Reporting important macro events, and market and product numbers as at the close of the previous day. The objective of this report is to keep readers close to markets and products as to facilitate informed discussions between wealth managers and clients.	PSG FAs	Daily	PSG Wealth in-house	Distributed via email
Weekly report 	Provides a more detailed review of the most significant macro and market events from the preceding week.	PSG FAs	Weekly	PSG Wealth in-house	Distributed via email
Monthly report 	The PSG Wealth Monthly Investment Insights provides a review of market performance over the preceding month and describes our own product performances within this context. The report also describes our tactical preferences and highlights some aspects regarding product positioning, performance expectations, and risks to those expectations.	PSG FAs	Monthly	PSG Wealth in-house	Distributed via email
Quarterly report 	Our flagship report which provides a full assessment of local and global economic conditions, markets, asset classes and products. The assessment provides a review of the preceding quarter, and also describes our forward-looking assessment as it relates to positioning and performance expectations.	PSG FAs and clients	Quarterly	PSG Wealth in-house	Adviser version distributed via email. Client version distributed via myPractice

Please send an email to PSGWealthMarketing@psg.co.za if you would like to be placed on the distribution list to receive the Daily, Weekly, Monthly and Research and Strategy Report from PSG Wealth CIO, Adriaan Pask.



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Topic	Research provided	Audience	Frequency	Origin	Access
Special reports 	Ad-hoc notes in response to shock events are released to address investors' concerns. The objective is to provide assessment of risks and some peace of mind in terms of our own product positioning.	PSG FAs	Ad-hoc	PSG Wealth in-house	Distributed via myPractice
The Wealth Perspective 	A quarterly newsletter which offers insights on specific topics of interest in the industry.	PSG FAs and clients	Quarterly	PSG Wealth in-house	Distributed via email and hosted on www.psg.co.za
Monthly Solution slides 	A monthly set of PowerPoint slides on our PSG Wealth Solution funds. The slides are a carbon copy of the material reviewed by our PSG Wealth Fund committee and provide a full review of all the details pertaining to performance and positioning.	PSG FAs	Monthly	PSG Wealth in-house	At meetings and on myBase. Please follow this link . Sign in to myBase and you will be directed to the most recent solution slides.
South African sell-side equity research 	South African equity research provided to PSG Securities which is used as a fringe benefit to clients who trade securities via PSG Securities. All PSG Wealth advisers automatically qualify for this research.	PSG securities clients	Ongoing	PSG Wealth in-house	Please click here to log into this research. Please note that you will need to log in first. This is available to registered account holders.
SocGen 	Societe Generale provides global research on: <ul style="list-style-type: none"> • Economics • Quantitative research and technical analysis • Strategy and asset allocation • Commodities • Credit, rates and currencies • Equities • Emerging markets • Socially-responsible investment 	PSG Wealth portfolio managers	Ongoing	SocGen	This research can be accessed on sgresearch.com . All PSG Wealth Managers (previously titled portfolio managers) automatically qualify for this research. If you require log in details to the research portal please contact Franco Pretorius (franco.pretorius@psg.co.za) who will assist you with the registration process.