VUNANI

FUND MANAGERS

MULTI-ASSET CLASS CAPABILITY

Who We Are

Since 1999, Vunani Fund Managers has been renowned for delivering exceptional investment solutions that exceed expectations.

Our mission is to cultivate an organization that prioritizes growth and support for both our staff and clients, so that we can work together to achieve greatness. We believe that our people are the driving force behind our success, and we pride ourselves in creating an environment that fosters passion, dedication, and determination to provide unparalleled service to our clients.

Our investment capabilities are truly diverse, spanning Fixed Interest, Domestic Equity, Global Equity, Multi-Asset, and Passive investments, with a dedicated offering that caters to both institutional and retail clients. Our research-driven approach is the key to achieving consistent long-term results for our clients.

At Vunani Fund Managers, we are committed to creating long-lasting relationships with our clients and providing them with effective investment solutions to grow their wealth, together.

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Leading with Excellence

Established Wisdom, Dynamic Approach

At Vunani Fund Managers, we are committed to building something different. We believe in doing things organically and operating with a forward-thinking mindset to achieve excellence. Our innovative spirit permeates everything that we do, and we are committed to pushing boundaries and creating solutions that exceed expectations.

Client-Centric Approach

For us, success is about how satisfied our clients are. We place a strong emphasis on building a close working relationship with our clients and recognize that we have been entrusted to manage their money. We strive to achieve the best possible solution tailored to their individual goals and needs, and go the extra mile to ensure our clients feel supported, informed, and confident in their investment decisions.

Unwavering Resilience

Resilience is at the heart of our business. By harnessing the strength and determination of our team, we continue to drive success and growth even in the face of adversity. Our ability to adapt and evolve is what puts us above the rest, and gives our clients peace of mind, knowing that we are committed to delivering the best results for their investments.

Collaborative Culture

A culture of growth, collaboration, and shared expertise is a core element of the way we work. We are committed to cultivating an environment in which each team member reaches their potential and contributes to the collective success of Vunani Fund Managers. Our belief is that by investing in our people, we can deliver the best outcomes for our clients.

Profound Proficiency

Vunani Fund Managers' strong track record speaks for itself, owing to our unmatched expertise and in-house systems. We have invested heavily in developing both our team and our own in-house systems and processes. This combination gives us an edge over our competitors, allowing us to make informed investment decisions, maximize efficiency, and ultimately, get the job done.

Investing with Purpose

At Vunani Fund Managers, we want to create value for our clients. We believe that introducing Environmental, Social and Governance (ESG) considerations is not only the right thing to do, but also essential in enhancing investment outcomes and creating value that endures. By embracing sustainability as our guiding principle in everything we do, we can lay the foundation for a future marked by purpose, progress, and impactful change.

Our Multi-Asset Investment Philosophy

Experience the difference with our Multi-Asset Class Funds.

Our investment philosophy is centred around generating consistent real returns over the long-term through a disciplined yet flexible approach, allowing us to provide clients with the most appropriate mix of assets for different market environments.

This way, we can diversify our clients' portfolios in the most effective way to achieve their investment goals with controlled risk exposure.

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Our Multi-Asset Investment Process

As we target hurdles over inflation, we constantly monitor the macroeconomic landscape to make informed decisions about our clients' portfolios.

Our "three-state" asset allocation framework us to adjust clients' investments based on the direction we believe the macroeconomy is moving.

BAD STATE	NORMAL STATE	GOOD STATE
a period of economic contraction where allocation is focused on risk mitigation	a period of moderate growth and inflation, leading to more neutral strategic asset allocation	a period where the economy operates freely and with a general sense of wellbeing, giving rise to a more opportunity-seeking allocation

By assessing the economy in 'bad', 'normal', or 'good' regimes, we can invest the funds of our clients into the right asset classes that have historically outperformed in each state.

In addition to our data-driven framework, we also harness the collective insights of our team to understand the economy's current state and our positioning within it.

Through this process, we can construct portfolios that are optimised for the best likely returns and provide enhanced protection against potential losses.

Research

Our comprehensive research process draws upon a range of sources, both internal and external.

Our portfolio managers also follow economic, political, and social trends to foresee macroeconomic shifts on both local and global scales.

Our specific sources of information include our in-house research team, impactful management meetings and company visits, valuable insights from brokers' research, independent third-party analysis, and thought-provoking conferences and webinars.

By combining expert insights with a keen eye for long-term potential, we bestow strategic investment opportunities on our clients that drive their financial success.

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Portfolio Construction

Our portfolio construction is not just a process; it is an ongoing pursuit of excellence.

Our process is constantly evolving, as we strive to bring our clients enhanced techniques when it comes to construction and implementation in their portfolios.

Our Multi-Asset team has standing access to deliberations in all specialist teams. This inclusive approach, which leverages our collective expertise, ensures that we are fully embedded and invested in the best decisions being made for our clients.

And, together with our Asset Allocation Forum which combines our Multi-Asset and senior investment team members, we further collaborate and debate our investment ideas across asset classes.

Risk Management

Balancing risk and return dynamics

Our clients take comfort in our ability to handle their investments through any market condition. Our risk analysis allows the team to manage both intended exposures and unforeseen risks. Regular team reviews ensure full transparency and robust engagements.

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Sustainable Investing

We believe that incorporating sustainability into our investment process is not only a responsible choice, but a smart investment decision.

We know that sustainability is multi-faceted and strive to take a comprehensive approach that considers environmental, social, and governance (ESG) practices in the entities where we commit client funds.

We analyse investment opportunities whilst assessing ESG factors, ensuring that we have a thorough grasp of the risks and opportunities associated with each investment.

By actively managing these factors, we can build portfolios that combine financial returns with good social and environmental impacts, resulting in lasting benefit for our clients and society at large.

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Contact Us

Contact us for more information on our company and product range

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Company Registration No: 1999/015894/07

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Verification assesses whether (1) the firm has complied with all the composite construction requirements of the GIPS standards on a firm-wide basis and (2) the firms' policies and procedures are designed to calculate and present performance in compliance with the GIPS standards. Verification does not ensure the accuracy of any specific composite presentation.

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