



Hi All,

At PortfolioMetrix, we continuously review client portfolios to ensure they remain aligned with their strategic objectives. As part of our regular review process, small, **incremental adjustments will be made across the Global and South African solutions.**

These changes form part of **our disciplined investment approach and are intended to maintain appropriate diversification, support long-term risk management and ensure that portfolios remain** aligned with their existing risk profiles.

Please **click the links below** to view the two detailed communications:

SA rebalance

Global rebalance

A reminder to join our Investment Insights webinar on the 22nd of October for more on our approach to risk and asset allocation. [Click here to register.](#)

Should you have any questions or require any information please contact the Partner Relations team on support@portfoliometrix.co.za.

The asset allocation adjustments described are implemented within the parameters of the applicable mandate and risk profiles. The illustrations reflect broad portfolio positioning and may vary by mandate and client circumstances. Allocation changes and rebalancing do not guarantee performance, eliminate risk, or prevent losses. End-client suitability and disclosure obligations remain the responsibility of the advising FSP.

Kind regards,

Brendan de Jongh

Head of Global Investment Strategy

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