

AC Corporate Transaction Services

Asset Management Services

A client required assistance with managing a diverse portfolio of assets that included international investments.

Background

The client has recently established a structure to hold a diverse portfolio of investments.

Approach

We performed a valuation and portfolio review to understand the risk and volatility of the portfolio.

Other work included a review of the financial, tax, legal, risks related to the portfolio.

Created a formal document that outlines the client's objectives, constraints, and the investment strategies to be employed. This serves as a long-term guide for all investment decisions.

Designing a high-level investment strategy that allocates capital across various asset classes (e.g., equities, fixed income, real estate, commodities) to optimize the balance between risk and return.

Implementing strategies to minimize the tax burden on investment returns.

Generating periodic reports (e.g., quarterly, annually) that detail the portfolio's performance, including returns, against relevant benchmarks.

Outcomes achieved

- ✓ Achievement of Financial Goals.
- ✓ Optimal Portfolio Performance.
- ✓ Effective Risk Mitigation.
- ✓ Increased Transparency and Control.
- ✓ Operational Efficiency.

Client Feedback

'I found the thought-provoking and challenging sessions have played a part in guiding me, your team are rare individuals you come across who can combine intellectual ability and practical skill with a high degree of authenticity and integrity.'

Introduction to AC Corporate Transaction Services

We are professional service firm based in Sandton, South Africa. Our expertise covers corporate finance, share transactions, business development, strategy and governance matters. The firm is supported by a team of qualified professionals and associates who provide custom designed solutions, with an emphasis on high-impact, value-enhancing work that is clearly understood.

For further information, contact

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Engagement Overview



Role
Asset Manager



Sector
Diversified



Geography
Global



Transaction Value
R80m



Organisation Size
Private Holding Company



Duration
Annual management contract.