MyWealth Investments

# Welcome to MyWealth Investments



**The financial markets can be an intimidating place to navigate. Take charge of your future, overcome the fear of money, learn and embark on your journey to financial freedom**

## Introducing MyWealth Investments

MyWealth Investments is committed to guiding its clients through the financial markets and is uniquely positioned to offer professional advice and services to individuals who are interested or currently investing in the global financial markets.

MyWealth Investments is a comprehensive and authorised financial services provider. We provide education, research, financial planning, advisory, investment and trading services to Regenesys students, alumni, staff and the general public.

Through learning programmes, investment club meetings, bespoke research and personal consultations, MyWealth Investments helps its clients to navigate and grow in the world of finance and ultimately achieve financial freedom.

### Investment Philosophy

The organisation's investment philosophy is founded on a bottom-up fundamental approach, which identifies investment opportunities that we believe are priced correctly and have the potential to deliver exceptional risk-adjusted returns.

### Expertise

Make MyWealth Investments your provider of choice, as we offer:

- Experienced professionals to guide you
- A comprehensive financial service
- An array of products to suit your needs
- World-class financial market education courses

### How we can help you

MyWealth Investments is a proud member of the Regenesys Group. Understanding how to access financial markets and the ability to achieve financial freedom should be available to all.

## Investment Products

Whether you are nearing retirement, or just starting to invest in the financial markets, MyWealth Investments has the right product for you. Our investment products cater for a wide variety of risk profiles. We can tailor our approach according to your requirements and risk appetite. No matter how little or how much you have to invest, speak to us today to start investing.

### Equity portfolios

Having an equity portfolio allows you as an investor to earn returns through share appreciation plus dividends declared. An investor can diversify their portfolio by investing across different sectors on the stock exchange, investing in JSE listed companies with a long-term view to mitigate risk. The investment style is suitable for investors who can withstand potential capital volatility in the shorter term.

### Trading portfolio

Investors who want to participate in financial markets for a shorter trading period, can participate with derivative instruments. Derivative instruments are products like single stock futures (SSF), contracts for difference (CFD) and currency futures (FX). Most investors will use these products as a way to minimise risk in their equity portfolio. This type of portfolio takes short term views on events like volatile share price movement, factors like dividend payments and company news or industry specific factors.

### Tax-free savings accounts (also available for minors)

The South African National Treasury has approved the implementation of a tax-free savings account (TFSA) as an incentive to encourage individuals to save. The aim is to increase saving over and above retirement based-savings through a more accessible, tax-free product. We can assist you with this.

### Unit Trusts

MyWealth partners with preferred Investment Managers to provide superior investment opportunities to our clients who wish to invest monthly, or who currently own unit trusts. Collective Investment Schemes are commonly known as Unit Trust Funds, where the money from many investors is pooled together and invested in assets like shares, bonds, property and cash. Investors do not have to manage individual investments themselves, but rely on the skills of experienced investment professionals to manage the Fund.

### Retirement Annuity

Regardless of your current savings, MyWealth will help you plan for a comfortable and secure retirement. Be prepared for the day when you retire. It's never too late to start. We will help you achieve financial freedom so you can continue to do the things you love even when you retire. There is no time like the present to start saving for your retirement, so make your future a priority today!

### Student Loans

Many students do not have the money to study. They need financial assistance but don't know where to turn. MyWealth Investments helps you to sort out your financial hurdles with a student loan. We offer student loans through Standard Bank and ABSA as well as in house Regenesys Student Loans. We believe that all students should have access to education.

### Investment Club

The MyWealth Investment Club provides learning, support and networking opportunities to its clients. Typical programmes for the Investment Club meetings comprises of a presentation from an expert market commentator or panel discussion in the areas of investments, trading, economics and financial planning, followed by a Q & A session, and networking. Investment Club meetings are held monthly.

## Investor Educational Courses

Through our world-class short learning programs, MyWealth Investments will help you take charge of your  financial future. We provide you with the tool to get there. Whether you are a novice or an investment professional, our world-class programmes will meet your needs. MyWealth Investments also offers customised programmes available to suit your organisation's individual needs. Attend one of our courses to demystify personal finance and the financial markets. Courses run throughout the year and are beneficial no matter what your current knowledge and experience.

### Trading and Investments

This course provides you with an appreciation of the trading and investment environments and personalises your approach to these by developing an investment philosophy and strategies that will work for your family's unique needs.

### Personal Finance and Investments

Completion of this course will give you knowledgeable insight into personal finance and investment. It deals with managing your personal finances and gives an introduction to financial markets.

### Employee Financial Wellness

Managing our personal finances is a challenge all of us face. The decisions and habits we form here will often be the biggest contributor to our financial futures. This course will challenge and encourage you to apply practical techniques that can be used for the rest of your life to build and grow wealth.

### Why MyWealth Investments?

- Investment and trading education and learning opportunities
- Investment Club to support clients in learning about investment management and breaking their fears of money
- Personalised support
- Customised and affordable student loans
- Member of the Regenesys Group



Contact us today for more information:
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Let us help achieve your dreams!