

## ABOUT US

We provide fund research, ratings and portfolio construction advice to financial advisers and institutions. Our goal is to assist our clients make informed investment decisions on behalf of the end investor. The core of our business is an experienced team performing qualitative fund research - where we aim to understand the factors which drive investment success. We believe that through research based insight and an independent business model we can improve the investment outcome for clients in the markets where we operate.

## VALUE PROPOSITION

We follow a client-centric approach and look to embed this principle in the work we do. We value relationships with clients who are like-minded, and look to put the interests of the end investor first. Clients look to us for independent advice and insights into how they can advance their businesses, and we assist them in implementing these changes. We have a wide network of industry relationships who we can call on to assist in delivering effective solutions for clients.

## SERVICES OFFERED

We offer three types of services to our clients:

1. **Fund Manager Research:** We perform comprehensive assessments on SA and Offshore fund management capabilities.
2. **Investment Advisory:** We build and manage research driven model portfolios for financial advisers and their clients. This service combines our investment expertise and our industry leading fund manager research.
3. **Financial Adviser services:** Financial advisers use us as a source of expertise in various areas, including; investments, practice development, succession management and strategy. We provide these services through an online offering called Fundhouse Adviser Online, a Practice Development Programme run in conjunction with Allan Gray and through our consulting offering.

## KEY INDIVIDUAL

Name: Ian Jones

## CONTACT PERSON

Name: Ian Jones

## CONTACT DETAILS

Tel (work): +27 21 670 3340

Email: [adviser@fundhouse.co.za](mailto:adviser@fundhouse.co.za)

Website: [www.fundhouse.co.za](http://www.fundhouse.co.za)

Address: 5th Floor MontClare Place, Corner of Main and Campground Rd, Claremont, 7708

## REGIONS SUPPORTED

We have offices in Cape Town and London, and service clients across Southern Africa and the UK.

## REFERENCE AND PRICING

Please visit our website: [www.fundhouse.co.za](http://www.fundhouse.co.za) to find out more about our pricing.