

INSIGHTS

2025 PROFILE UNIT TRUST AWARDS

A robust platform for long-term success

The Remo Thematic Growth Fund won the offshore performance, global equity general category.

The fund was launched in March 2021 by Rhoan Potgieter, chief investment officer at Remo Investment Management.

"The origins of the Remo Thematic Growth Fund trace back to 2017 when I launched my first fund product, the Prescient High Street Wealth Warriors Fund, which I created and managed until November 2020 with a total net return of 118% (22% ann) in dollars against a benchmark MSCI World Return of 60.5% (12.8% ann). At that time, many of my peers were emigrating as the long-term prospects for SA under a captured state were looking increasingly bleak. Eager to remain in the country, and searching for alternative solutions, I set out to create a vehicle for those living in SA to build their wealth in US dollars and gain exposure to global investment trends."

Remo's Thematic Growth Fund continued the philosophy and investment process that Potgieter had developed managing the Prescient High Street Wealth Warriors Fund.

"When I first entered the investment industry as an analyst in 2014, the local investment community was still scarred from the bursting of the dot.com bubble," he says. "In addition to negative attitudes towards technology stocks, investors were also wary of anything novel. Having grown up on either side of the internet, I was naturally attracted to the sectors of the market where innovation was driving superior growth and profitability. It was against this status quo that I set out to create a framework with which to assess and value these growth opportunities through fundamental analysis."

Over the past decade, he adds, this framework has



Rhoan Potgieter.

evolved into a structured investment process designed to cut through market noise and identify both compelling opportunities and key risks.

"The Remo Thematic Growth Fund launched at pretty much the peak of the Covid bubble in March 2021 which made for a difficult start as the US Fed's war with inflation really whittled valuations to the bone. After playing a fair amount of defence over this period — by the time rates had peaked — there was suddenly a lot of value on offer," he says.

An established investment process, he adds, allowed the fund to acquire and hold a relatively concentrated portfolio

of quality companies which have joined and, in some cases, driven the market's recovery over the past two years.

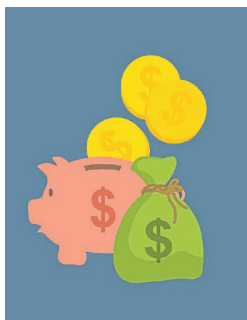
"In an increasingly dynamic and volatile environment, having a sound investment process has been critical to performance," says Potgieter.

Remo, a technology-driven investment firm focused on building a robust platform for long-term success, was founded with the aim of creating a range of high-quality, competitively priced investment products and wealth solutions.

While the Remo Thematic Growth Fund remains its flagship product, the firm has expanded its offering to include bespoke investment and wealth management solutions tailored to investors seeking global exposure. It also recently launched the Remo BCI Thematic Growth Feeder Fund (ZAR), providing South Africans who don't have access to dollars with a way to gain exposure to the fund in rands.

Other winners in the Offshore 3 Year performance category include the Contrarius Global Balanced Fund (global asset allocation —flexible); Standard Global Stable Fund (global, asset allocation prudential); and Allan Gray Africa Bond Fund (global, fixed interest, bond).

In the Offshore Risk Adjusted —5 Year performance category, the winners are Orbis Optimal SA Fund (global asset allocation flexible); Standard Global Stable Fund (global asset allocation prudential); GQG Partners Global Equity Fund (global equity general); and the Allan Gray Africa Bond Fund (global fixed interest, bond).



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2021
In the March of this year was when the Remo Thematic Growth Fund launched

Could've Should've Would've

The future does not wait.
Neither should you.

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