

PROVIDING **PEACE OF MIND** FOR OVER 25 YEARS

MitonOptimal is an owner-managed South African Discretionary Fund Manager (DFM), dedicated to providing advisers with peace of mind. We offer a comprehensive range of investment solutions to cater to an adviser's unique needs, assets under management and client book.

Established in 2000 - MitonOptimal is one of the longest-serving DFMs in South Africa. Our longevity reflects our commitment to excellence and the values that define us:



OWNER MANAGED



FLEXIBLE



EXPERIENCED



PERSONAL



INNOVATIVE



ACCOUNTABLE

OUR SOLUTIONS FOR RIFF DISTRIBUTION SERVICES

Aligned with our Core models, which are constructed using our Investment Committee's best ideas, the following solutions are available to RIFF advisers:

CPI +1%

MitonOptimal Core Pro
Enhanced Cash
(Reg 28)

CPI +2%

MitonOptimal Core Pro
Conservative Income
(Reg 28)

CPI +6%

MitonOptimal Core Pro
High Growth

PORTFOLIO CONSTRUCTION METHODOLOGY

The MitonOptimal investment process combines rigorous quantitative analysis with highly informed qualitative thinking, driven by our experienced and well-qualified investment team.

Portfolio construction decisions are made with respect both to asset allocation and the underlying funds. When allocating the underlying funds we believe in a multi-councillor approach built on three complementary components:

Houseview	40 – 60%	Other managers who see the world the same way as we do right now	CORE HOLDINGS: depend on our convictions
Indexation	5 – 40%	Used to bring down costs while buying the market	
Alpha Manager	10 – 55%	▪ Low correlation managers ▪ Value managers ▪ Market neutral managers	SATELLITE HOLDINGS: depend on correlations and theme preferences

Each manager plays a clearly defined role within the model portfolios, working together to target the desired return profile while seeking to minimise volatility.

OUR TEAM

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SOUTH AFRICA
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BEST SERVICING:
MITONOPTIMAL

Proud winner of the Best Servicing Award at the 2025 Citywire DFM Awards