



Retirement Fund Solutions

Retirement Fund Solutions

→ Agility

Sustainable Returns

Agility's Retirement Solutions offer employers and employees an effortless and highly rewarding solution that maximises investments through portfolios based on the investor's life stage. Portfolios are based on varying risk and asset class allocations within Umbrella Provident Fund structures.

Investment Strategies

Agility Retirement Fund Solutions provides two distinctive investment options: active managed funds and passive managed funds.

Our active managed funds are managed by experienced portfolio managers who actively make investment decisions to potentially outperform the market. These funds involve in-depth research and analysis to optimise returns.

Our passive managed funds are designed to replicate the performance of specific market indices without frequent buying or selling. These funds offer a cost-effective approach, with lower fees, and mirror the market's fluctuations.

Investors can choose between these options based on their risk tolerance, investment objectives, and preferences for active or passive investment strategies.

Agility Retirement Fund Solutions is committed to offering a diversified range of choices to suit the unique needs of our investors.

Investment Portfolios

Agility Fund Range

Combined active & passive managed fund range

Agility Conservative Fund

A low-risk, multi-asset-class global balanced portfolio.

Outperform inflation with low volatility returns over the short-to-medium term.

Agility Moderate Fund

Modest inflation-beating returns with a lower volatility of monthly returns.

50% strategic allocation to domestic and global equities.

Agility Aggressive Fund

Higher volatility returns, maximising capital accumulation over a longer-term.

70% strategic allocation to domestic and global equities.

Agility Core Range

Passive managed fund range

Agility Core Conservative Fund

Low risk multi-asset class global balanced fund managed on a passive basis.

Outperform inflation with low volatility returns over the short-to-medium term.

Agility Core Moderate Fund

A medium-risk multi-asset-class balanced portfolio.

Medium volatility returns over a long-term horizon.

Agility Core Aggressive Fund

A higher-risk multi-asset global balanced portfolio.

Higher volatility returns over a long-term period.

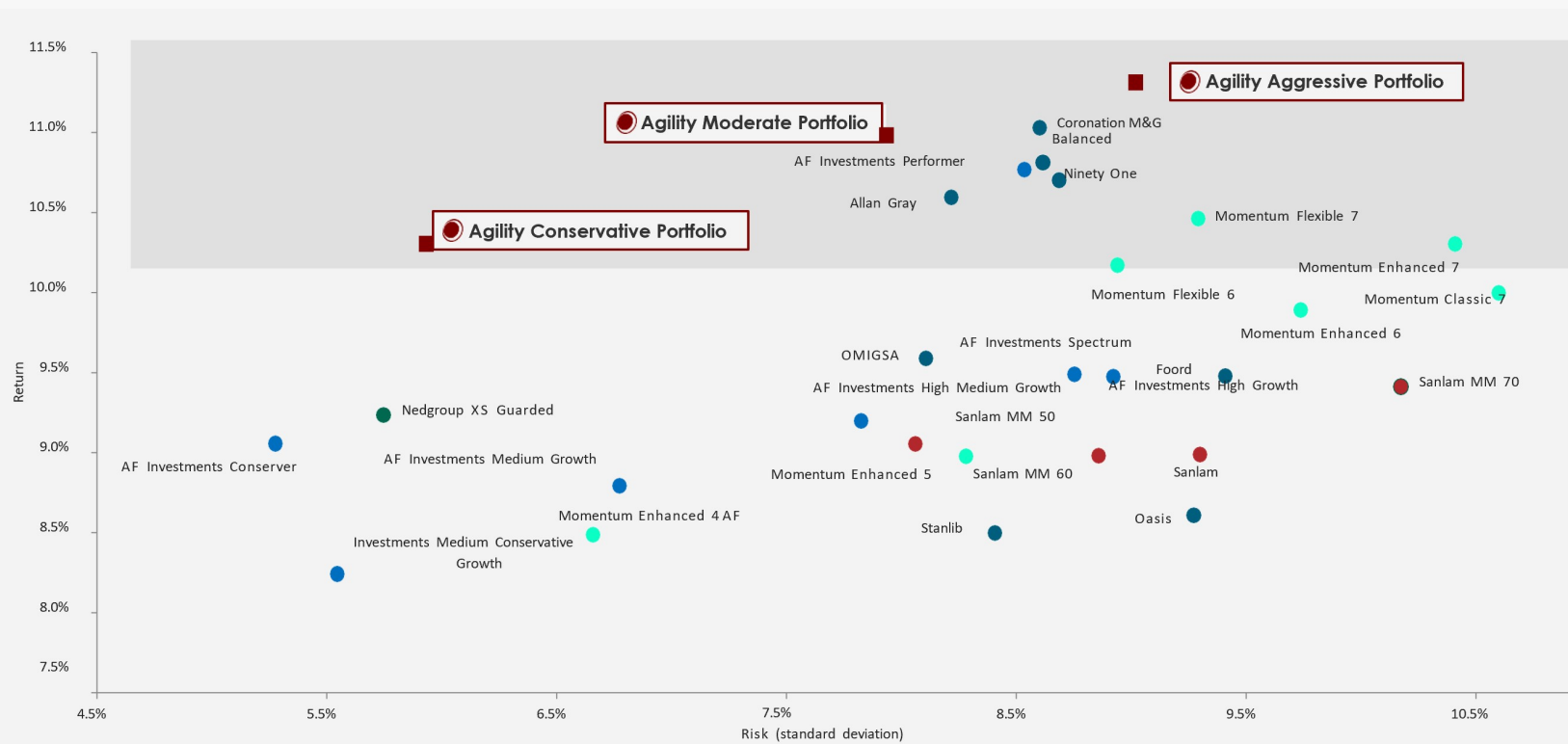
Agility Money Market Fund: Short-term, highly liquid money market instruments with a maturity of less than 13 months.



Volatility vs Return

Ten-year multi-manager scatter plot

The optimal level of return for risk assumed was achieved over a 10 year measurement period



Joint asset management with **Sygnia**

Key Features



Portfolios tailored to employees' life-stage & related risk exposure



Passive & active investment funds



Low asset management fees



Full employee benefit solution when integrated with Agility Corporate



Solution partner managing R228b in assets



Proven & consistent returns

→ **Contact us for a quote today**

Agility Retirement Solutions is a division of
Agility Insurance Administrators (Pty) Ltd
Reg. No. 2005/027365/07



021 918 6210
info@agilitygroup.co.za
www.agilitygroup.co.za