

Local Unit Trust Investments

Brought to you by Investec



Our Local Unit Trust investments

By pooling your money with that of other investors, investment managers can buy underlying investments (such as equities, bonds, cash and property) depending on the unit trust objective. A local unit trust provides easy and affordable access to equities, bonds and other markets. The unit trust is split into equal portions called 'units' that are allocated to you according to the amount of money you invest and the price of the units on the day that you purchase them.

Invest from R1 000 per month to help you grow your wealth. With Investec's Local Unit Trust offering you gain access to Investec Wealth and Investments expertise, backed by a tried and tested global investment strategy. The funds we have made available for your selection are actively managed and draw on the insights of an experienced team of investment professionals based in South Africa, Switzerland and the United Kingdom.



Immediate, secure online access

You have immediate, secure access to Investec's local unit trust solutions through My Investments on Investec Online and the Investec App. You can start investing with a lump sum of R10 000 or a monthly debit order of R1 000. Your money will be managed by our Wealth & Investment experts and supported by our rigorous global investment process.

It's your choice

Our funds have been carefully curated to meet your needs at various life stages. The fund you select will depend on your investment objective. Once you understand your investor profile and objectives, you will be in a better position to choose the fund that best suits your requirements.



Shorter term	Medium term	Longer term
Investec BCI Active Income Funds of Funds	Investec BCI Balanced Funds of Funds	Investec BCI Equity Fund Investec BCI Diversified Growth Fund of Funds Investec BCI Balanced High Equity
1-3 years	3+ years	5+ years
Local		

AS A SHORTER-TERM INVESTOR	AS A MEDIUM-TERM INVESTOR	AS A LONGER-TERM INVESTOR
<ul style="list-style-type: none"> I am looking for greater certainty and stable returns. I prefer less exposure to equities, listed property or other higher risk investments. 	<ul style="list-style-type: none"> I am looking for higher potential returns and growth. I understand that to achieve this I need to take investment risk and tolerate periods of potential return volatility to meet my long-term goals. I want a balanced investment with a mix of higher and lower risk investments. 	<ul style="list-style-type: none"> I want the best growth opportunities and inflation-beating long-term investment returns. I understand that I need to take investment risk and tolerate periods of potential return volatility to meet my long-term goals. I understand this potentially means a reduction in the value of my investment in the short-term. I want my investment to be primarily in higher risk investments, such as equities, property and private equity/unlisted investments, with a small portion in bonds and cash.

Rewards and benefits

By opening an Investec unit trust fund, you also enjoy the following benefits:

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Leverage our international network

We have operations in 14 countries, giving you access to local and offshore markets. Our clients benefit from our multifaceted, in-depth, global investment processes which offer scale, reach and continuous growth.
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Access to Investec Advisers

You always have the option to speak directly to an Investec Financial Adviser. Our advisers do not charge any additional fees or commission for advice provided, ensuring objective advice that aligns with your best interests.
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Boost your rewards earn rate

The balance across all your unit trust investments contributes to determining your earn rate on the Investec Rewards programme.



Get in touch

If you have any queries about My Investments or our Local unit trust options, you are welcome to get in touch.

☎ 0861 468 387 (08:00 and 17:00, Monday to Friday)

✉ investments@investec.co.za

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