

Tax-free investments


Brought to you by Investec

Our tax-free investments


Invest in our tax-free investment (TFI) solutions and take full advantage of the tax-free benefits to help you grow your wealth.

You have the ability to invest in our tax-free investment solutions for you and your children from R1 000 a month up to a maximum of R36 000 per tax year and a lifetime contribution of R500 000. This product is administered by Ninety One investment platform.


Benefits of a tax-free investment by Investec

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Local and offshore tax-free investment options

Use our tax-free investment vehicle to invest free of tax and gain access to **local and offshore investment opportunities**.
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Tax-free

You do not have to pay any taxes on the interest, dividends and capital gains earned on your investments within our TFI. This allows you to capitalise on the benefit of compounding returns during the term of your investment.
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Flexibility

You can invest funds whenever you like and you can choose how you want to invest – with lump sums, regular contributions, or a combination of the two.
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Transparent fees

Investec does not charge any advice fees or commission. This helps you reduce your cost base and boost your growth over the term of the investment.

It's your choice

Our funds are managed by our Investec Wealth & Investment experts and fully backed by our rigorous global investment process. The fund you select will depend on your investment objectives. Once you understand your investor profile and objectives, you will be in a better position to choose the fund that best suits your requirements.

Local			Offshore	
Shorter term Investec BCI Active Income Fund of Funds 1-3 years	Medium term Investec BCI Balanced Fund of Funds 3+ years	Longer term Investec BCI Equity Fund Investec BCI Balanced High Equity Fund Investec BCI Diversified Growth Fund of Funds 5+ years	Medium term Investec BCI World Axis Core Feeder Fund 3+ years	Longer term Investec BCI World Axis Global Equity Feeder Fund Investec Global Leaders Feeder Fund Investec BCI World Axis Flexible Feeder Fund 5+ years

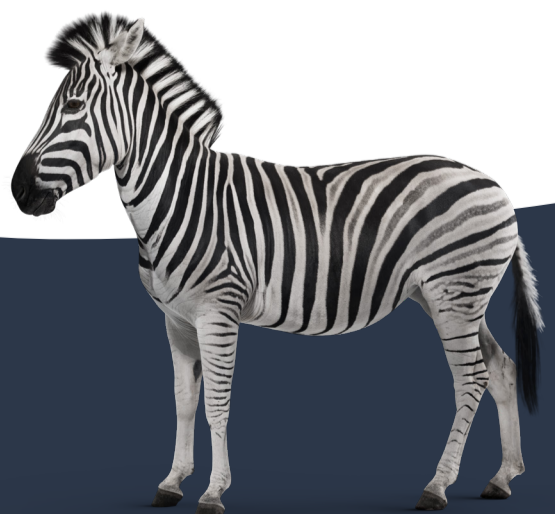
AS A SHORTER-TERM INVESTOR	AS A MEDIUM-TERM INVESTOR	AS A LONGER-TERM INVESTOR
<ul style="list-style-type: none"> I am looking for greater certainty and stable returns. I prefer less exposure to equities, listed property or other higher risk investments. 	<ul style="list-style-type: none"> I am looking 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 possibly in cash and/or bonds.

Get in touch

If you have any queries about our Tax-free Investments please contact us on

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

investments@investec.co.za



OUT OF THE ORDINARY