

Investment management

Whether investing for a specific goal or to create a secure financial future, Sanlam has the investment management expertise required to protect and grow your wealth.

What is investment management?

Investment management involves creating a strategy to manage an individual's investment portfolio and other financial assets for both short-term and long-term growth, depending on a client's specific requirements. A key focus is to meet the investment goals of the client such as financial freedom during retirement or receiving a regular income.

Do you require a professional investment manager?

People choose to invest with Sanlam for a variety of reasons. For many, the motivation is to use investing to create a secure financial future for themselves and their families. There are often specific points along their investment journey, such as generating funds for education, property or travel as well as providing for unexpected financial expenses at any stage of life.

Whatever your reasons for investing, we can help you reach your financial destination with our expertise in investment management. Understanding what is important to you is at the heart of the investment portfolio we will build. That's why the starting point is a discussion with one of our investment managers where you can tell us about your financial situation, priorities, life goals and attitude to financial risk.

Our sharp focus on meeting real-world objectives appeals to a wide range of investors from individuals and couples to large families with assets held in different structures, including pensions and trusts as well as settlements of all kinds. They are attracted to the combination of our investment skills and high standards of service.