



Offshore investing

Investing beyond borders with Alexforbes



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Going beyond borders can be a daunting but rewarding experience – both for travellers and investors.

For many high-net-worth investors, investing globally can play a significant role in:

- ✚ diversifying investment plans
- ✚ lowering investment risk
- ✚ growing their wealth outside South Africa

The reality:

South Africa's local equity market is among the world's most concentrated with only 320 listed companies available for investment. There are over 58 000 listed companies in the world.

58 000

\$105 trillion

The market cap of the JSE is \$1.36 trillion compared to a global universe of about \$105 trillion.

Source: World Federation of Exchanges, March 2022

The South African market offers limited investable opportunities in attractive and growing industries, such as technology and healthcare.



South Africa's social, economic and political strains can be a major driver of currency risk and currency-induced inflation.

Your net worth, and what you have accumulated up to now, is worth growing and protecting. Investing offshore presents a good opportunity to access broader markets, diversify sources of your investment return and potentially benefit from movements in exchange rates.

You should be considering offshore investments if you are:



preparing to emigrate in the future



funding a child's overseas studies



avoiding local economic and political risks to investments



investing for five years or longer



having money available overseas



adding asset and currency diversification to investments

Our specialised services for high-net-worth clients add value through:



Personalised advice – with a comprehensive view of your current employee benefits, retirement and wealth portfolio, it’s easier to identify gaps and take action to better manage and grow your wealth outside South Africa.



Investment advice – leverage the investment and research expertise of our global strategic investment partners to glean insights that inform smart money decisions offshore.



Objective advice – our private wealth managers operate independently of any asset manager or product provider. You can benefit from solutions objectively blended across a breadth of offerings available in the market that best serve your distinct needs.



Sound advice – you can count on both the responsiveness personal touch of a small firm and the strength and dependability of a large company.



Benefit from diversified investment structures that make investing offshore an attractive option for growing and preserving your wealth outside South Africa.



globally domiciled unit trusts



offshore endowments



international pension plans



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