Enhancing your advice proposition

By Methula Sikakana, Business Development Manager

Our experience shows that aligning products with client needs is crucial for building a successful advisory practice. When products are tailored to meet clients' specific requirements, trust is strengthened and client loyalty is fostered.

Did you know the JSE accounts for only 0.4% of the global investment universe? This makes it increasingly important to explore global investment opportunities in pursuit of portfolio diversification and financial returns. Without effective investment strategies and trustworthy partners with the right expertise, advisers may find it challenging to fully leverage the potential of this vast landscape and assess the benefits of the numerous available funds.

Unlocking the best investment ideas globally

At Equilibrium, we partner with you to elevate your value proposition by providing access to local and global investment opportunities. With over 17 years of experience and offices in Johannesburg, Pretoria, Cape Town, London and Manchester, our team oversees over R34-billion in assets for retail investors in South Africa. Our global reach grants access to over 1 000 local funds and 20 000 offshore funds, allowing us to fully optimise the potential of a complex and interconnected investment landscape.

An advice-led business

As a discretionary fund manager (DFM) and multi-manager, we aim to bridge the gap between investments and advice by constructing portfolios that align with the adviser's advice processes. Through our collaboration, we help clients achieve their investment goals by assisting them in understanding market trends, investment opportunities and financial strategies, which can empower them to make informed decisions. Regular communication helps build trust and ensures clients feel valued and understood.

We combine the best investment ideas to create resilient portfolios that withstand various market cycles. Most importantly, we see ourselves as partners to advisers, enhancing the value of investment advice to clients. We aim to build a closer relationship with advisers, develop a deep understanding of their advisory propositions, and tailor our offerings to integrate seamlessly into their value propositions – generating maximum value for clients.

Providing clients with educational resources about market trends, investment opportunities and financial strategies can empower them to make informed decisions. Regular communication helps build trust and ensures clients feel valued and understood.

Our solutions can be implemented through a model portfolio or a fund-of-funds structure, depending on your Financial Services Provider (FSP) licence (Category I or II) and preferences:

- With a Category II licence, we can make simultaneous changes across all investors within a specific portfolio.
- For a Category I licence, changes require signed instructions from each client; however, this process remains simple and efficient with our digital solutions.

Additionally, Equilibrium helps increase your practice's efficiency, supports succession planning and facilitates practice mergers or higher valuation multiples at exit.

At Equilibrium, we bring improved balance into your financial advice practice. We don't just manage investments – we collaborate with you to deliver meaningful outcomes to your clients. Contact us today at info@eqinvest.co.za to find out how we can assist you in achieving better outcomes for your clients.