

Scaling new heights

By Florbela Yates, Managing director, Equilibrium Investment Management

Since the strategic rebranding to Equilibrium in 2022, our business has undergone a transformative journey. We have unified our local and offshore discretionary fund management (DFM) capabilities, and today we are a fully-integrated global team covering both listed and unlisted assets across the globe.



From R13-billion to R34-billion: AUM growth that tells a story

In 2021, Equilibrium managed R13-billion in assets. Fast forward to 2025, and that figure has soared to **R34 billion – a 161% increase** in just four years. This growth reflects the trust advisers and investors place in Equilibrium's consistent performance, strategic clarity and human-centric approach.

Our success as a DFM stems from our ability to empower financial advisers with scalable, outcome-based investment solutions. By becoming an extension of the adviser's practice, Equilibrium fosters long-term partnerships built on trust, shared goals and mutual growth.

Global integration: Bringing the world to South African investors

Momentum Global Investment Management (MGIM), our global investment partner based in London, was established in 1998, managing assets for retail and institutional clients around the world. We have integrated our offshore and local teams into one global team, leading to truly global-based thinking.

Our US-dollar multi-managed model portfolios (Equilibrium Global Cautious, Equilibrium Global Managed and Equilibrium Global Growth) are each tailored to specific risk profiles and investment horizons. These hard-currency offshore solutions give clients access to world-class global asset managers and access to a diversified global mix of asset classes, currencies and geographies.

The global integration between Equilibrium and MGIM has further enhanced our offering by:

- Infusing **international expertise** into local strategy.
- Driving **product innovation** through cross-border collaboration.
- Strengthening **governance and compliance** with global standards.
- Expanding our **distribution support** to adviser networks across regions.
- Expanded access to a **wider range of investment opportunities**, including alternative and unlisted investments.

Our global reach allows us to cover over 1 000 local funds and 20 000 offshore funds, ensuring that our portfolios are truly diversified and globally competitive.

The rise of alternatives: Diversification with purpose

Equilibrium's alternative investment platform has become a cornerstone of our growth. Since launching our bespoke hedge fund model portfolios in 2020, we have seen growing demand as advisers seek alternative return sources and new ways to diversify client portfolios. We manage two distinct hedge fund models: a Stable Hedge Fund model, which targets cash +3% and is designed to act as a diversifier within portfolios; and a Growth Hedge Fund model, which targets returns in line with local equities and serves as a return enhancer.

Looking ahead: Purpose, partnership, performance

Our journey is far from over. With a clear purpose – to create sustainable investment propositions aligned with client objectives – we continue to evolve, innovate and lead.

Equilibrium offers a compelling proposition: enabling your advice outcomes. Contact us at info@eqinvest.co.za to find out how we can assist you in getting better outcomes for your clients.