



Mastering insightful investing

Perpetua is an independent, owner-managed investment management firm. We strive for excellence in performance, conduct and engagement, and operate out of a purpose-driven culture.

We consistently employ a long-term investment approach that is thoughtful, rigorous and independently minded.

2012
Perpetua is founded
First Domestic Equity client
is onboarded

2015
Expanded product
range with launch of
Domestic Core Equity
strategy

2019
Launch of Global
Focused Equity in the
form of a UCITS Fund
Became signatories to
the UN PRI

2021
Onboarded U.S.
multimanager, xPonance
as a global equity client

2024
Winner of 27four DEI
Leadership Award

2026
AUM surpasses R25bn
PRI - 5-star ratings
across all categories

2014
Launched equity & balanced
fund unit trust funds
ESG integrated into our
investment process

2018
AUM of R10bn
Hosted inaugural Gender
Lens career workshop

2020
Inaugural Stewardship
Report was published

2023
Launched Global Core
Equity & standalone
Fixed Income products
ABSIP Award: *Best Black
Fund Manager of the Year:
Global Equities*

2025
Winner of 2025 27four DEI
Leadership Award
ABSIP Award: Team of the
Year: Equities
On-boarded first Domestic
Bond mandate

Who we are

100%

Owned by staff



Majority black and majority
woman-owned.

27 staff

10 investment team members
(5 portfolio managers and 5 analysts),
and 17 operational and client service
team members.

Level 1

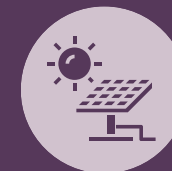
B-BBEE rating



Genuinely active, disciplined value
investors, utilising bottom-up
fundamental analysis to outperform the
market.



Responsible investors and corporate
citizens who recognise the need for
broader societal impact. We have been
PRI signatories since 2019.



Perpetua Holdings has established the
private markets capability through
Perpetua Infrastructure. Perpetua
Infrastructure is focused on developing
investment opportunities within the
infrastructure space, particularly
renewable energy.

Our investment beliefs

Our investment philosophy is centred on the bottom-up, fundamental research of investments. We seek out mispriced, undervalued investments and invest with a long-term and patient view.

Our investment process ensures we invest according to the convictions of our research with an emphasis on mitigating permanent downside risk. We concern ourselves with doing what is right for the long-term, not simply what is popular for now.

Our investment edge

We see investing as an act of stewardship which is supported through our owner-manager mindset and culture.

As investors in our own funds and firm, we are directly aligned to the interests of our clients.

We innately exhibit and protect a set of behaviours as investors which enables us to stay true to our investment approach.

Our diverse team reflects a wide scope of experience and skill and our strong mentoring culture ensures we invest to develop the next generation.

Visit our
website



For more information, contact us

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Perpetua Investment Managers (Pty) Ltd is an authorised financial services provider, registration number 2006/014297/07 and FSP number 29977

Our vision

To attract and retain engaged, loyal clients by understanding their needs for financial security and impact while exceeding their expectations through thoughtful & courageous decision-making, care, and support.

Our mission

We exist to be thoughtful and courageous investment partners who create and deliver opportunities for financial security and societal impact.

Our values

Our actions and culture are guided by our values of



Integrity



Care



Courage

Our location

Based in Cape Town, South Africa, we are global investors who utilise our unique emerging markets perspectives to seek out opportunities across all asset classes and markets.

Our product offering

Mandate	Description
Perpetua Multi-Asset Domestic	South African domestic multi-asset class portfolio, combining Perpetua's top-down macro driven asset allocation process with bottom-up fundamental asset class research and stock-picking. The portfolio construction of the domestic equity component is benchmark agnostic.
Perpetua Multi-Asset Global	Global multi-asset class portfolio, combining Perpetua's top-down macro driven asset allocation process with bottom-up fundamental asset class research and stock-picking. The portfolio construction of the domestic and global equity component is benchmark agnostic.

Mandate	Description
Perpetua Domestic Focused Equity	South African domestic equity, high conviction, unconstrained portfolio construction; only invests in approved buy list shares; typically, 45 holdings; maximum tracking error upper bound may be client restricted
Perpetua Domestic Core Equity	South African domestic equity portfolio with defined rules regarding allocation to each share and sectors relative to benchmark exposure; will own minimum positions in large benchmark shares
Perpetua Global Focused Equity	Global equity high conviction, unconstrained portfolio construction; no minimum holdings; only invests in approved buy list shares; typically 40-50 holdings; maximum tracking error may be client restricted. We offer clients segregated global developed markets, as well as global all country mandates.
Perpetua Global Core Equity	Global equity diversified, moderate risk portfolio construction; typically 60 - 70 holdings; moderate tracking error. We offer clients segregated global developed markets, as well as global all country mandates.
Perpetua Cash Enhanced	Short-duration fixed income strategy investing in structured notes, derivatives, short-dated government bonds, select short-term credit opportunities and collective investment schemes/funds . The benchmark is SteFI+1%.
Perpetua Flexible Fixed Interest	Fully flexible fixed income fund that invests in credit opportunities, duration positions, structured notes, derivatives and alternative strategies. The fund aims to minimise volatility by utilising the various instruments in the fixed income universe across domestic and global fixed income instruments. The benchmark is SteFI x 120%.
Perpetua Domestic Bond	South African domestic bond portfolio that seeks to generate capital and interest returns by investing primarily in South African government, parastatal and corporate bonds. The fund invests in fixed income instruments offering superior yields while actively managing duration and credit, thereby limiting downside risk. The benchmark is the ALBI.
Perpetua Renewable Energy Debt	Private markets debt offering with strong impact and development focus. Invests in senior debt and mezzanine debt in renewable energy project companies with long term agreements with credit worthy counterparties. The counter parties are RSA government, RSA listed companies. The technologies invested in range from solar, wind and battery storage. The benchmark is JIBAR plus 200bps
Perpetua Renewable Energy Equity Fund	Private markets equity offering with strong impact and development focus. Invests in equity or participating equity type instruments in renewable energy project companies with long term agreements with credit worthy counterparties. The counter parties are RSA government, RSA listed companies. The technologies invested in range from solar, wind and battery storage. The benchmark is JIBAR plus 400bps