Advisory portfolios

Stockbroking

1972

Starting in 1972, Standard Stockbroking, has over 50-years of experience in serving clients’ needs by providing a range of trading services and investment solutions to protect and grow their investment portfolios.

What is an advisory portfolio?

An advisory portfolio is a self-managed portfolio, where you access our content and have access to a portfolio manager to assist in your decision-making. You will receive investment views and suggestions from our investment process on both market opportunities for return but also suggestions on how to better manage risks in your portfolio.

This type of mandate is what is described as an agency (or non-discretionary) mandate. This mandate allows clients (or their advisors) to create a bespoke solution, supported by our curated content. Standard Stockbroking curates' content, ideas and solutions across global and domestic markets and these ideas are positioned with clients and advisors on a regular basis. The solutions and ideas are vetted by our investment team, in line with our investment process across direct listed equities, ETFs and structured products.

Why use an advisory portfolio?

- You have a strong desire to be in charge of your own investment journey and decide on how the portfolio is constructed.
- We partner with the you to provide curated content that generates ideas and solutions for possible inclusion into your portfolio.
- Your financial advisor may make use of the advisory portfolio to house solutions as part of your tailored investment outcome.

Why partner with us?

Since 1972, Standard Stockbroking has been helping clients manage their investment journey. We are a partner that aims to truly understand your needs. Our investment process is designed to identify opportunities and insights to assist you in managing your portfolio risk.

Our global advisory portfolios

The **Global Advisory portfolio** is a non-discretionary portfolio in which investments are made using direct securities, ETFs or or structured products. The portfolio is able to hold exchange-traded assets across multiple asset classes using our global platform.

Best suited to:

- Investors who want to self-manage their investments but seek some investment context when making changes to their portfolios.
- Investors who are actively seeking access to global opportunities in USD.
- Investors who want a flexible portfolio to create and house a bespoke solution for themselves.
- Investors who are comfortable with stock market fluctuations and potential capital loss.
- Investors of this portfolio typically have an investment horizon of more than five years.

Our domestic advisory portfolios

The **Domestic Advisory portfolio** is a non-discretionary portfolio in which investments are made into direct securities, ETFs or structured products. The portfolio is able to hold exchange-traded assets across multiple asset classes using our domestic platform.

Best suited to:

- Investors who want to self-manage their investments but seek some investment context when making changes to their portfolios.
- Investors who are actively seeking access to domestic and global opportunities in ZAR.
- Investors who want a flexible portfolio to create and house a bespoke solution for themselves.
- Investors who are comfortable with stock market fluctuations and potential capital loss.
- Investors of this portfolio typically have an investment horizon of more than five years.

How to get started:

Minimum Investment
R2,000,000 for Local Portfolios
US$125,000 for Global Portfolios

Management Fees and Brokerage Costs
0.40% Excl VAT for Global and Domestic Portfolios
0.50% Excl VAT Brokerage Fee

Contact us

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