



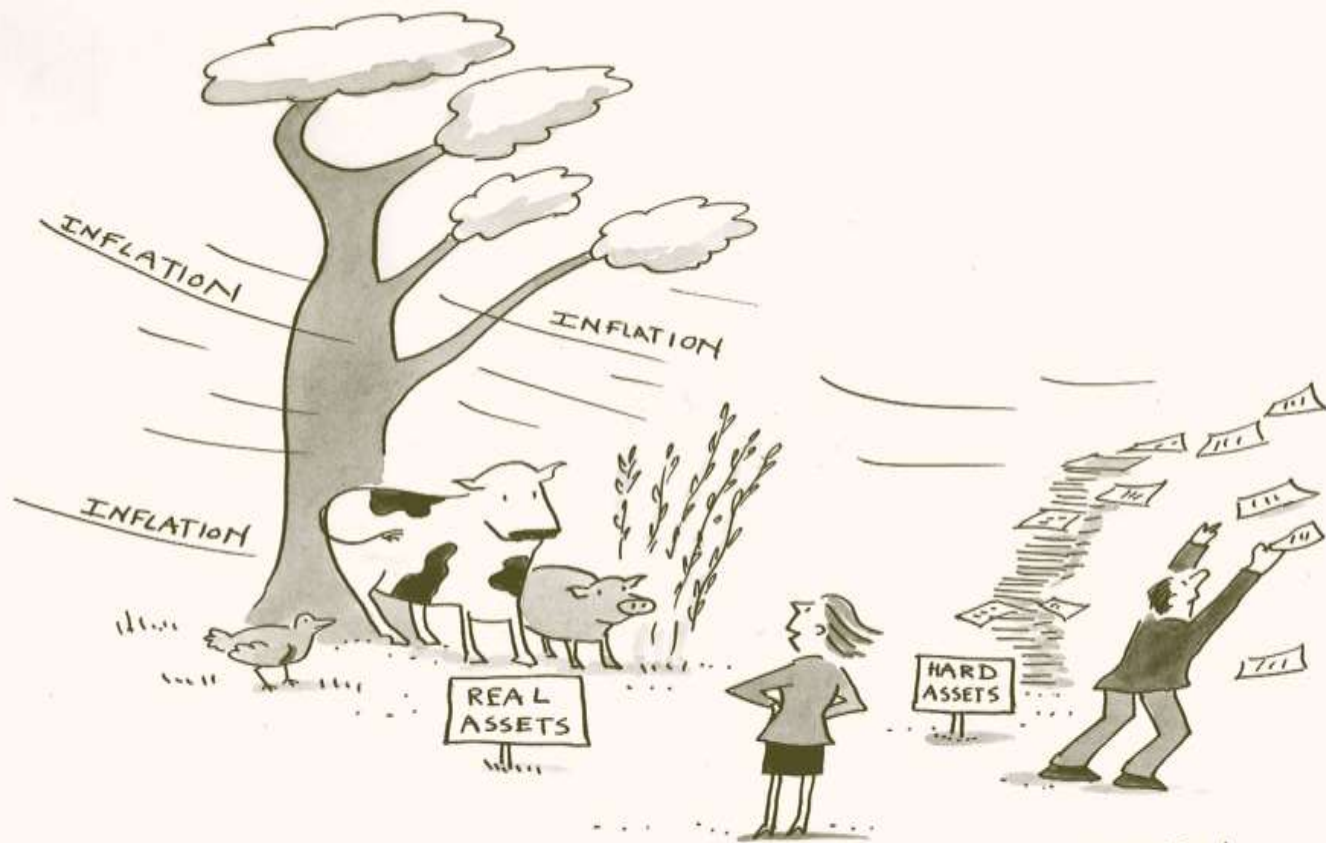
momentum
investments

INVESTMENT MATTERS

Investing for a real economy

Presented by Motlatsi Mutlanyane

9 November 2020



DONNELLY

"AT LEAST THE REAL ASSETS ARE STAYING PUT."

Post-recovery themes



Real asset themes

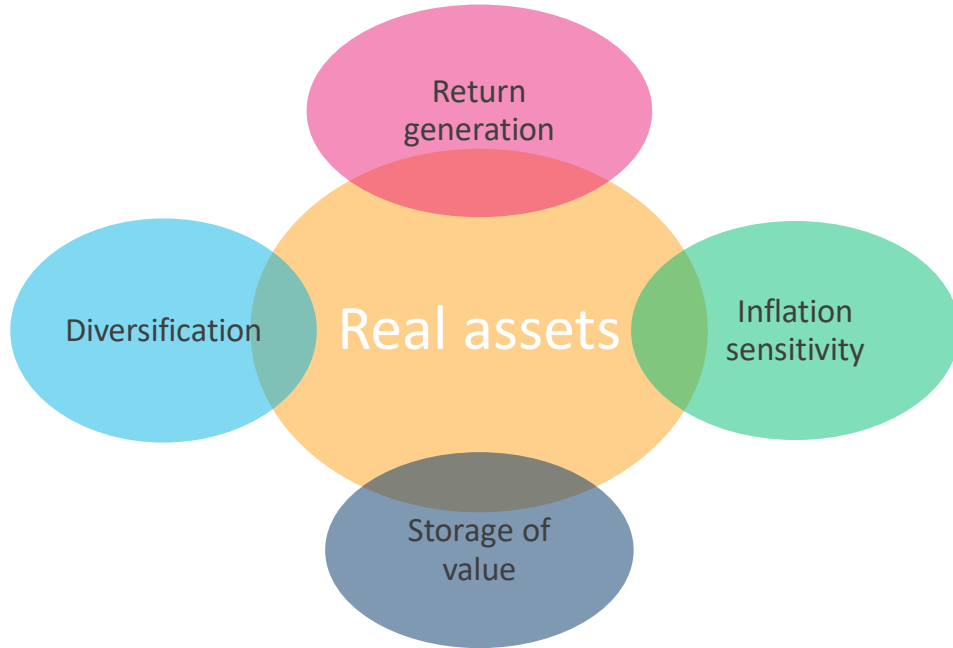
Infrastructure

Social effect

Natural resources

ESG integration

Real asset features



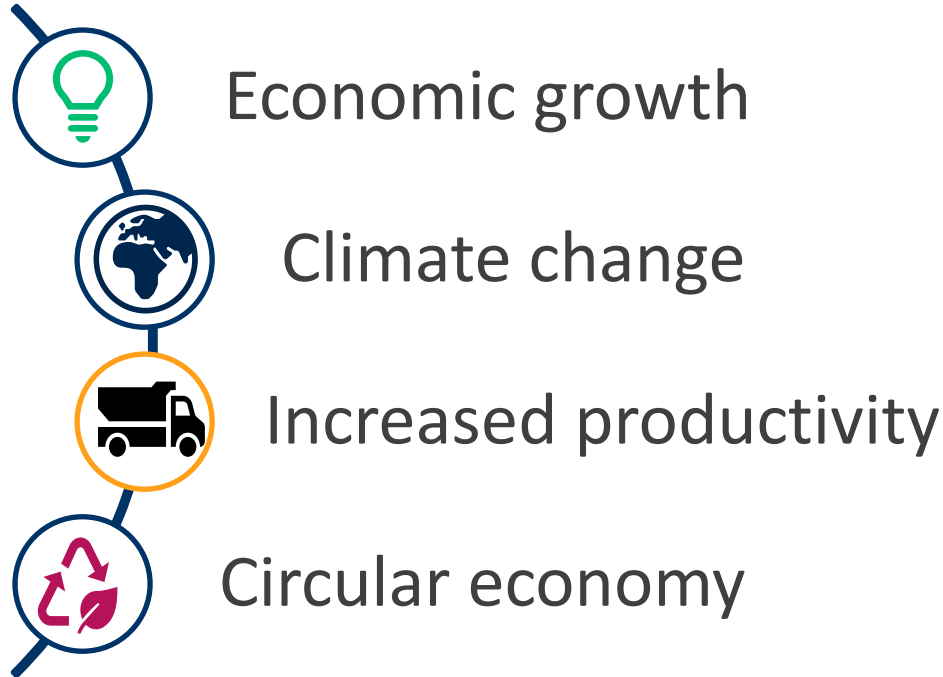
Physical hard assets (man-made or natural) and long-lived:

- Toll roads
- Airports and ports
- Direct property
- Energy generation (wind, solar and biomass)
- Towers and telecoms
- Social infrastructure (education, healthcare, and public facilities)
- Agri-business
- Commodities
- Other natural resources

Impact investing

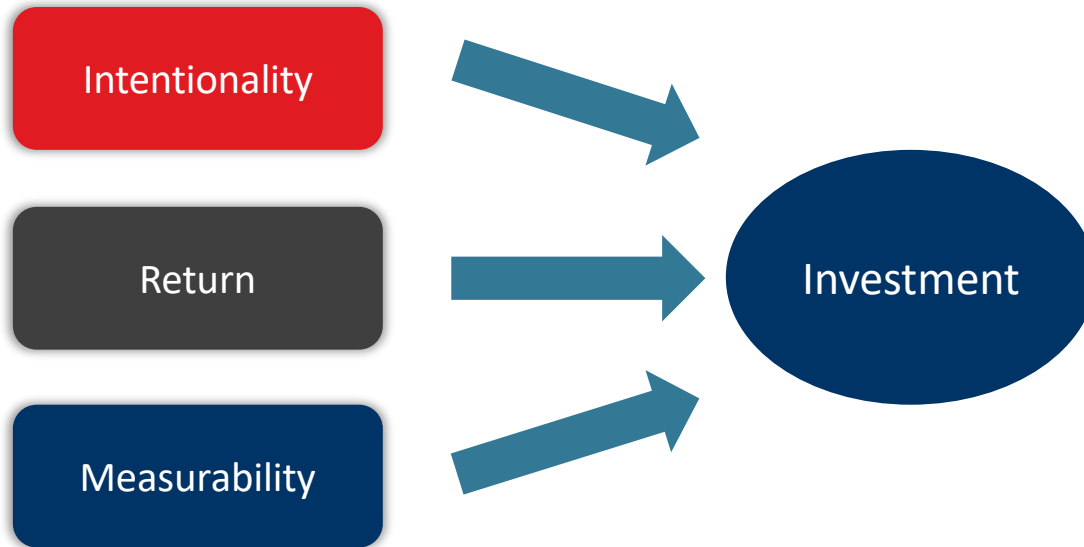


Societal challenges – solving for



Impact investment

Defining impact



Medium-term opportunities



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