

GRADIDGE MAHURA INVESTMENTS

INDEPENDENT. PROFESSIONAL. CONFIDENTIAL.

Gradidge-Mahura Investments: 2018 Top Wealth Manager

Gradidge-Mahura Investments dominates the annual Top Private Banks & Wealth Managers Survey

In what can only be described as a fairy tale, Gradidge-Mahura Investments (GMI) dominated the annual Top Private Banks & Wealth Managers Survey on the same day it turned 10 years old. The company took four major awards including the coveted overall Top Wealth Manager award. The company won the People's Choice award for the second year running, and won the overall award for the Passive Lump Sum Investor and the Young Professional categories.

This was also the first time in the history of the awards that a small wealth management boutique has won the overall award of Top Wealth Manager. GMI should have also won the overall award in the boutique category but did not qualify because we won the overall award. We are extremely proud of this performance and dedicate this success to those who have supported and believed in us from the start, especially to our clients.

The attached detailed report provides details of the methodology used to determine the winners. It also shows a breakdown of the scores of the top 5 participants in each category.

Gradidge-Mahura Investments celebrates its 10th anniversary

As alluded to above, GMI celebrated its 10th birthday on 26 June 2018. This is an important milestone for the business having started trading in the middle of a profound market and economic recession. We are most proud

of the fact that we were able to honour our initial commitment to never sell investment products which pay upfront commissions. This decision together with the timing of the start of trading should have been enough to kill of any hopes of survival. However, we managed to push through, eventually turning profitable in financial year 6.

We believe that our success stems from our client centric approach. We ensure that our clients' interests remain front and centre and take priority in every business decision. This has resulted in our strong showing in the People's Choice award since we first entered the survey. It also shows in the incredible number of referrals we receive from clients on an on-going basis. The vast majority of new clients in the past 5 years have come from client referrals.

As the business has grown it has put pressure on GMI to grow and restructure. After a number of service related challenges arose in the past 18 months as a direct result of the company growth, we have responded to ensure that we maintain service levels. We have employed additional staff and we have restructured the business internally with the aim of maintaining high standards of service. We acknowledge that we will drop the ball from time to time; however, we ask that you keep us on our toes by highlighting any such issues when they happen.

Market conditions continue to remain tough with local and international politics continuing to dominate headlines. We believe that those who are able to stick to their plan and sit out the volatility will be well rewarded in the end. As always, do not hesitate to contact your adviser if you would like to discuss any aspect of your plan or your investments.