



# BCI May 2026 Global Investment Conference

## Contrarian investing within a Balanced Fund

### **Contrarius Funds in South Africa**

#### **s65 approved offshore Irish UCITS Funds**

Contrarius Global Equity Fund

Contrarius Global Balanced Fund

#### **Rand-based Feeder Funds**

BCI Contrarius Global Equity Feeder Fund

BCI Contrarius Global Balanced Feeder Fund

#### **Contrarius South Africa Funds**

Contrarius BCI Equity Fund

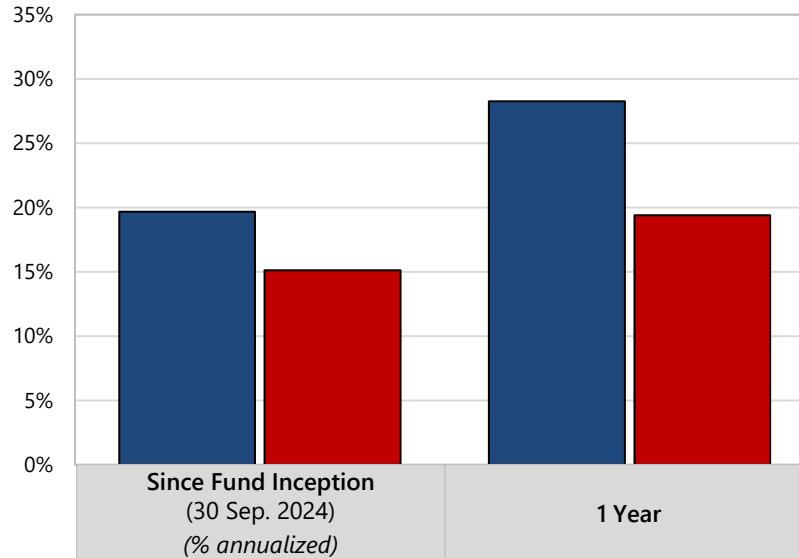
**Contrarius BCI Balanced Fund**

Contrarius BCI SA Equity Fund

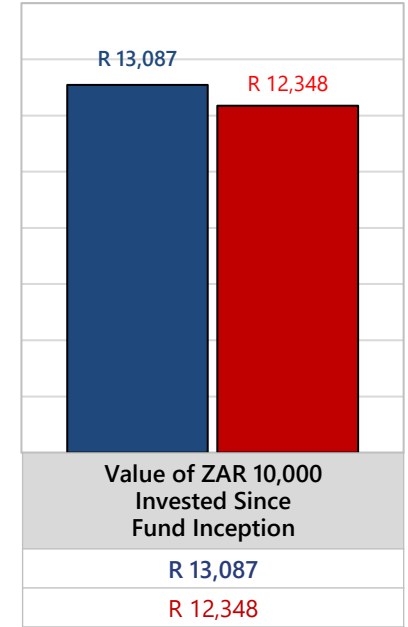
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# Contrarius BCI Balanced Fund | Performance <sup>1-4</sup>

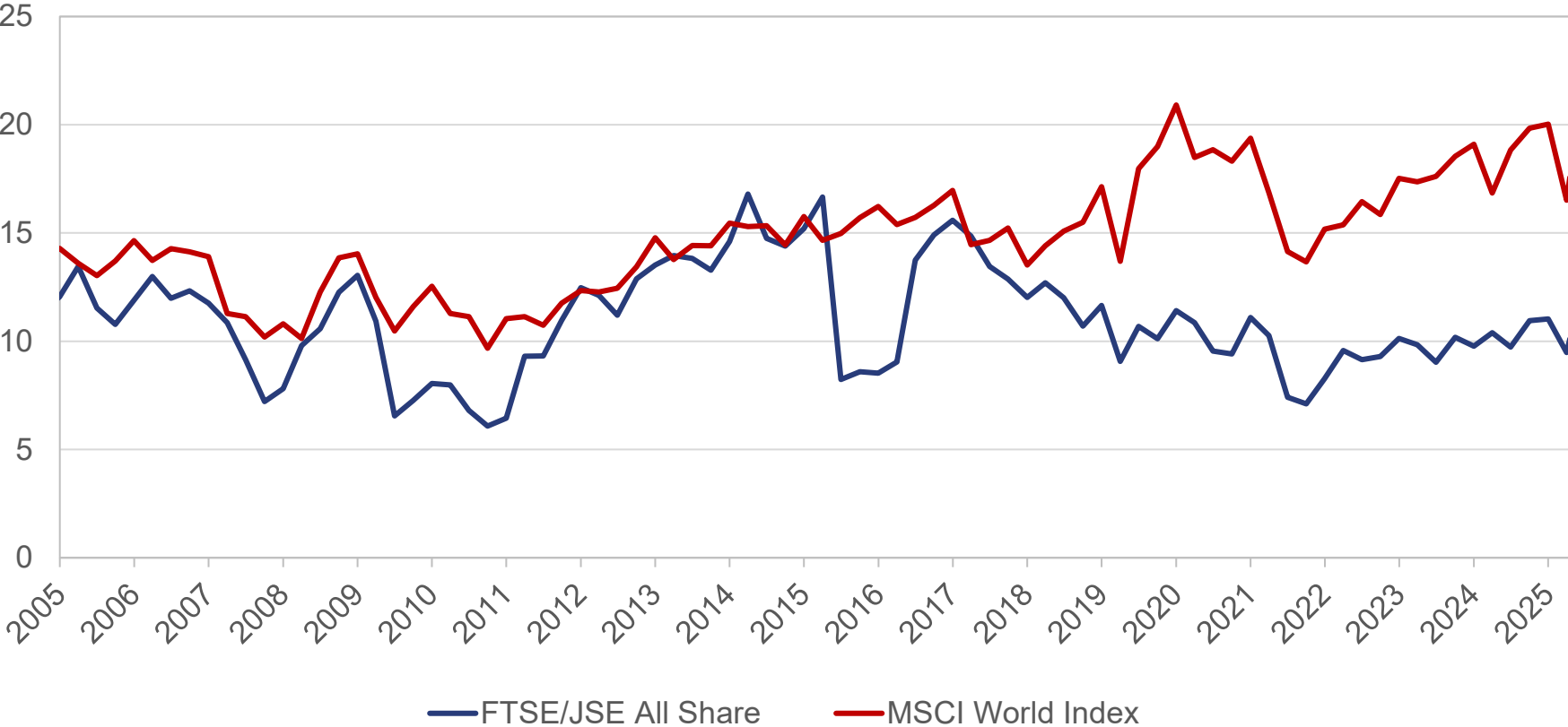


Contrarius BCI Balanced Fund	19.7%	28.3%
Composite Benchmark	15.1%	19.4%

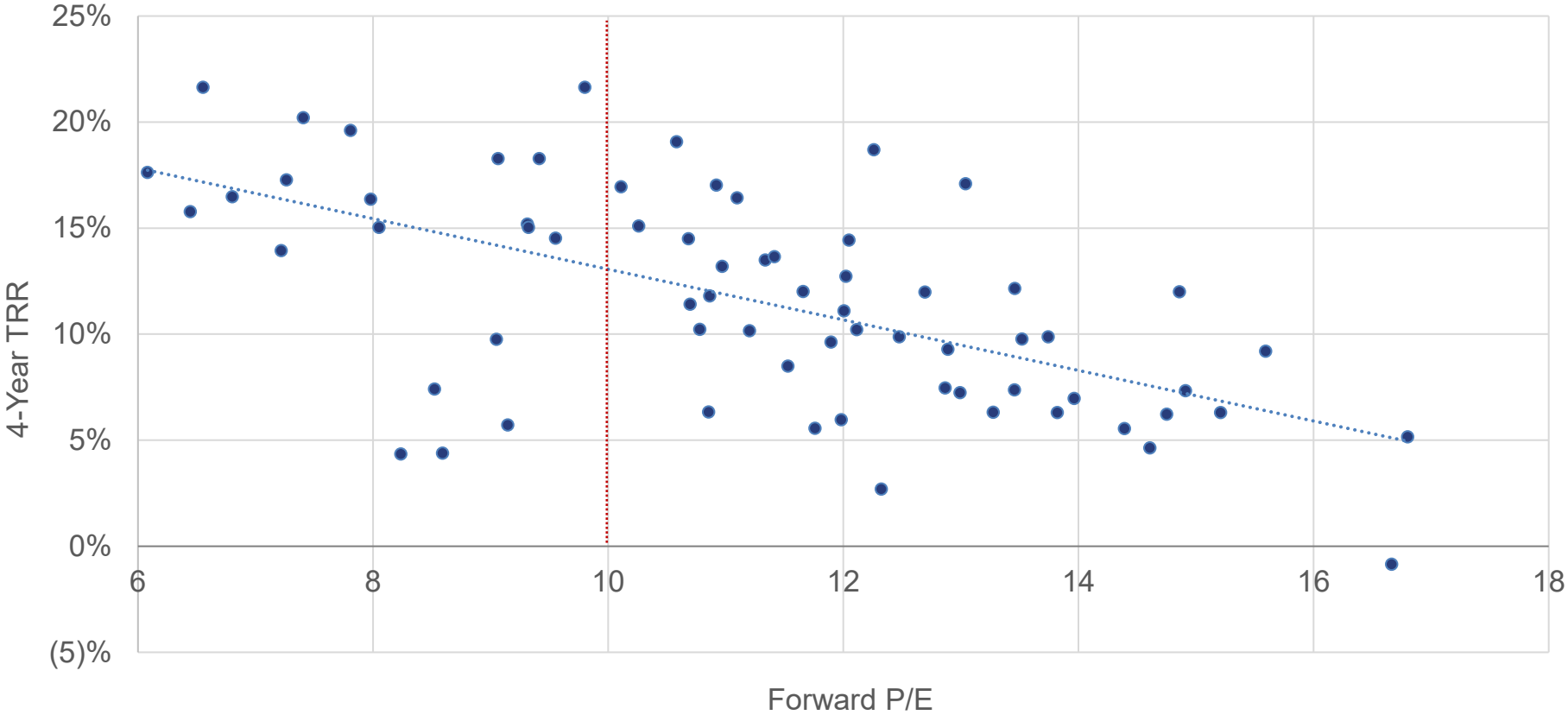


1. Past performance is not indicative of future performance. The value of investments may go down as well as up and investors may not get back the amount invested. Contrarius Funds' share prices fluctuate and are not guaranteed. Returns may decrease or increase as a result of currency fluctuations. There is no guarantee that an investor's capital will be preserved. Returns, other than for periods less than one year, are annualised. Annualised returns show the average amount earned on an investment each year over the given time period.
2. Performance to 31 March 2026, net of all fees & charges for Class A units of Contrarius BCI Balanced Fund. Performance information is provided in ZAR. Best Calendar year return: 2025: 22.7% | Worst Calendar year return: 2025: 22.7%
3. The benchmark for the Contrarius BCI Balanced Fund is composite index comprising 42% FTSE/JSE Capped All Share Index, 20% FTSE/JSE All Bond Index, 8% Alexander Forbes Short Term Fixed Interest Composite, 18% MSCI World Index, and 12% J.P. Morgan Global Government Bond Index, each including reinvestment of net income.
4. Source: Contrarius, Bloomberg

# FTSE/JSE All Share Index vs MSCI World Index | Forward P/E Multiple

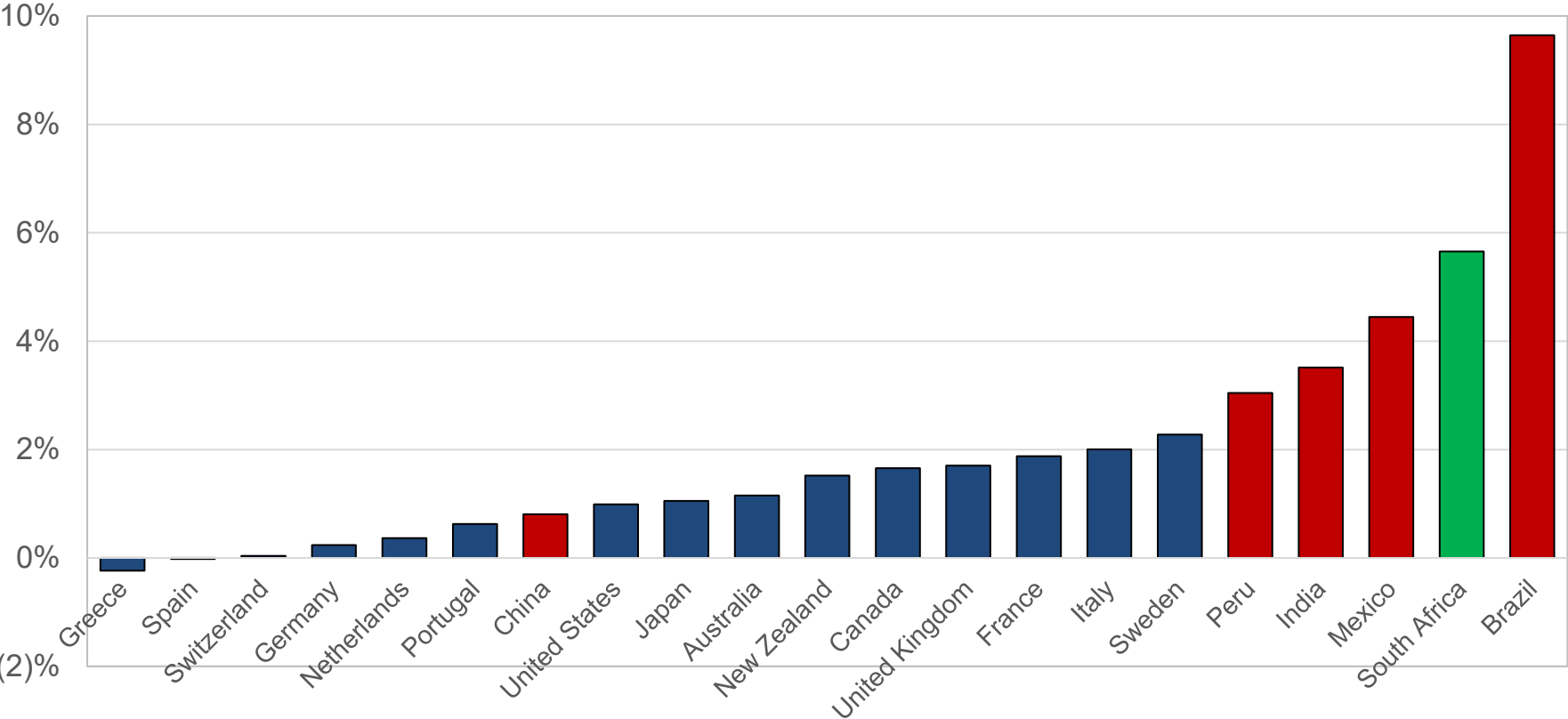


# FTSE/JSE All Share Index | Forward P/E Multiple vs Subsequent Returns



Forward P/E vs Subsequent 4-Year Nominal Total Returns incl. Dividends  
Source: Contrarius, Bloomberg

# Real Yields on 10-Year Bonds



## Contrarius BCI Balanced Fund | Asset Allocation <sup>1-4</sup>

	Total	South Africa	Foreign <sup>3</sup>
Net Equities	62.1	34.1	28.0
Hedged Equities	3.2	0.0	3.2
Property	0.0	0.0	0.0
Commodity-linked	2.3	1.8	0.5
Fixed Interest	23.7	21.1	2.6
Net Current Assets	8.7	7.0	1.7
<b>Total</b>	<b>100.0</b>	<b>64.0</b>	<b>36.0</b>

1. Asset allocation at 31 March 2026

2. Underlying holdings of foreign funds are included on a look-through basis.

3. The Fund may invest a maximum of 45% offshore.

4. Europe includes the UK

Note: Totals may not sum due to rounding.

Potential long-term winners of AI disruption

TESLA

Google

coinbase

SPACEX

Baidu 百度

Alibaba

High quality companies less likely to be disrupted

Kraft Heinz

Mondelēz International

DIAGEO

pepsico



Pernod Ricard

HEINEKEN



PHILIP MORRIS INTERNATIONAL

SWATCH GROUP

BAT



Paramount  
A SKYDANCE CORPORATION

Avoid companies that may be disrupted

VISA



AutoZone

duolingo

O'Reilly  
AUTO PARTS

Uber

PROGRESSIVE

Booking.com

concentrix

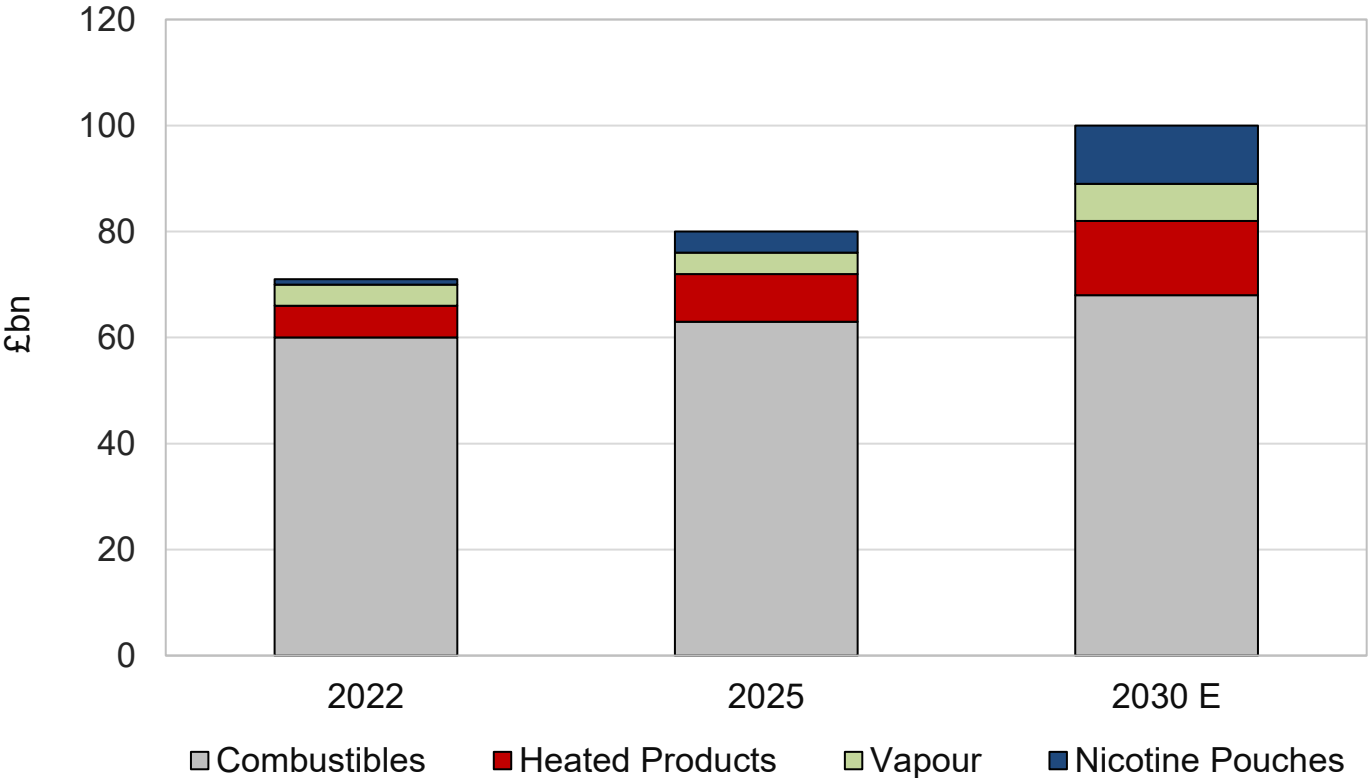
## Contrarius BCI Balanced Fund | Top 15 Equity Holdings <sup>1-2</sup>

Securities	% Fund
British American Tobacco	5.4
EchoStar	3.1
Tesla	3.0
Exxaro Resources	2.9
Sun International	2.8
African Rainbow Minerals	2.5
Sasol	2.3
Anheuser-Busch Inbev	2.2
HCI	2.2
South32	2.2
Thungela Resources	2.1
Philip Morris International	1.9
Famous Brands	1.6
Diageo	1.6
Tsogo Sun	1.5
<b>Total</b>	<b>37.5</b>

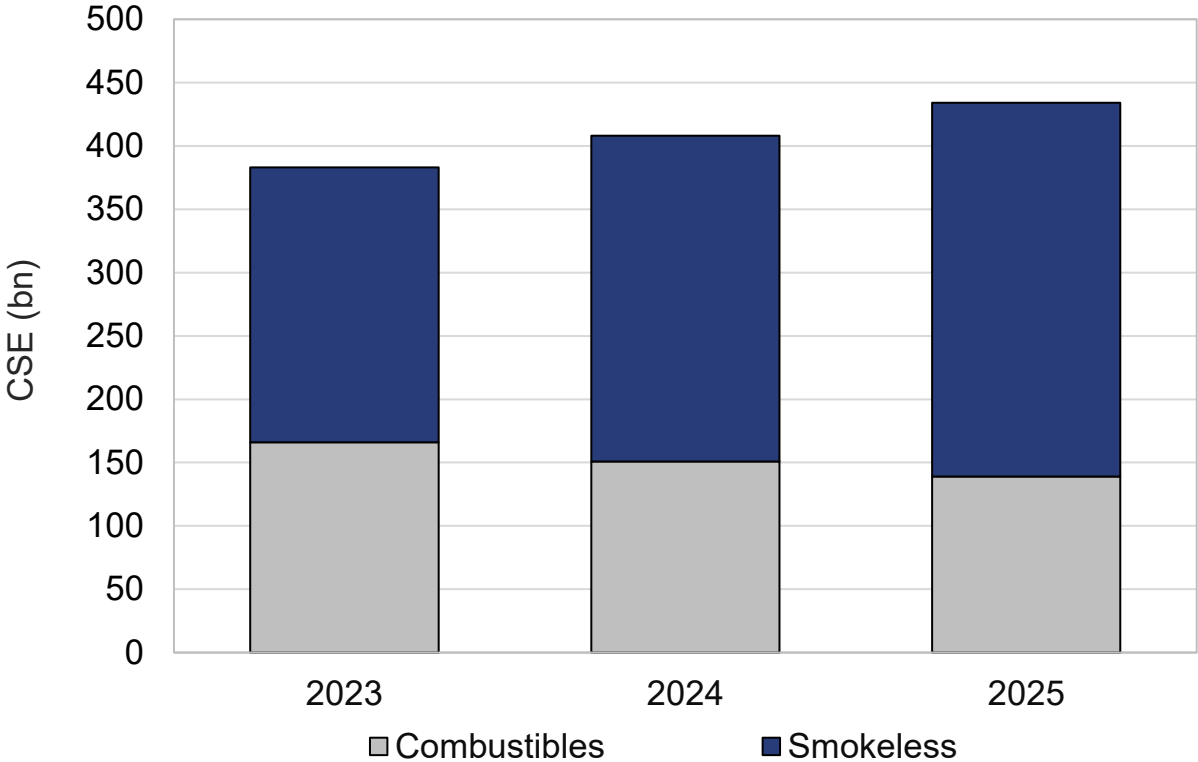
1. Contrarius BCI Balanced Fund at 31 March 2026

2. Underlying holdings of foreign funds are included on a look-through and aggregated basis.

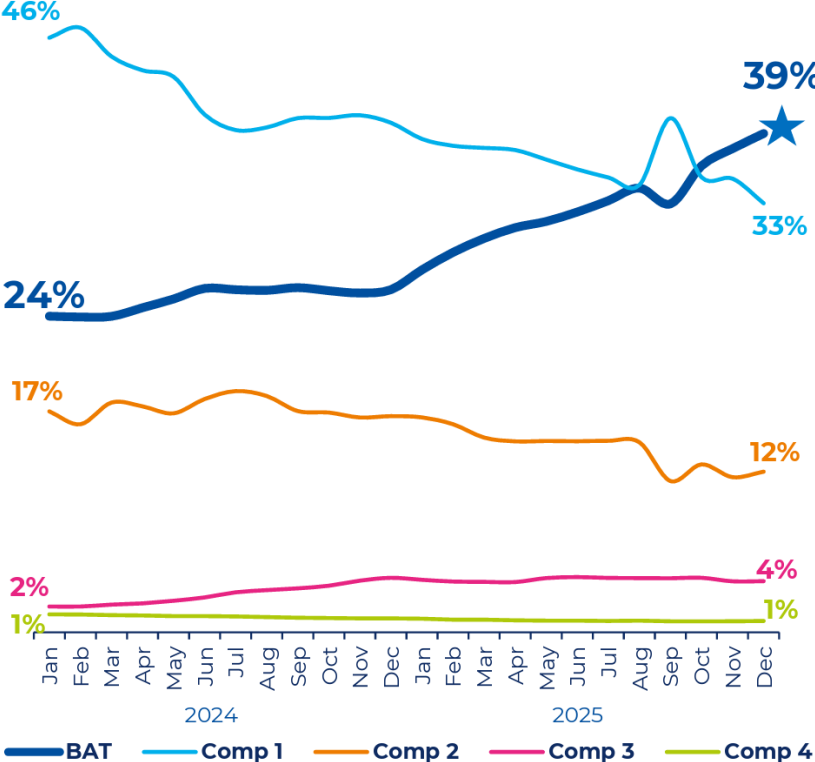
# British American Tobacco | World Nicotine Industry Revenue



# British American Tobacco | US Nicotine Industry Volumes

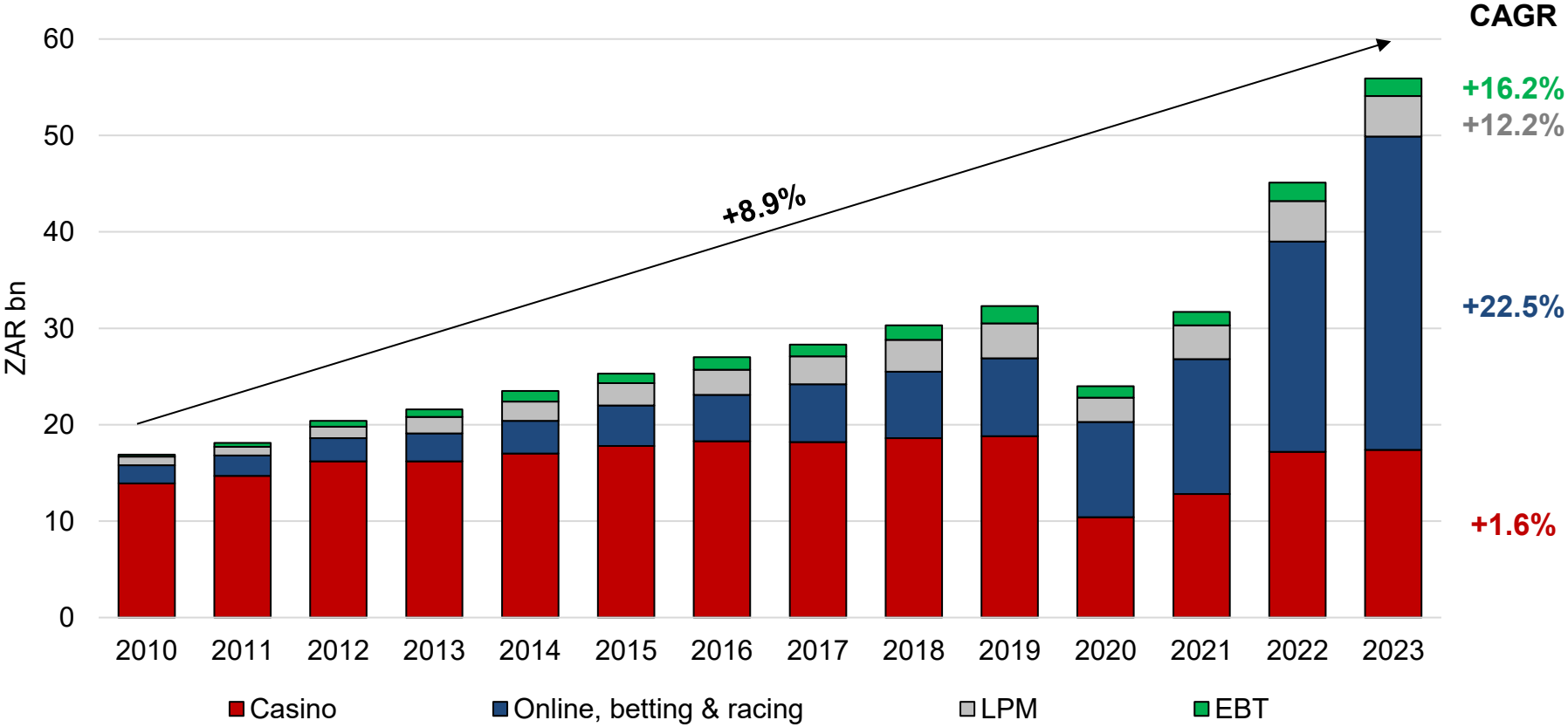


# British American Tobacco | Global Nicotine Pouch Volume Share

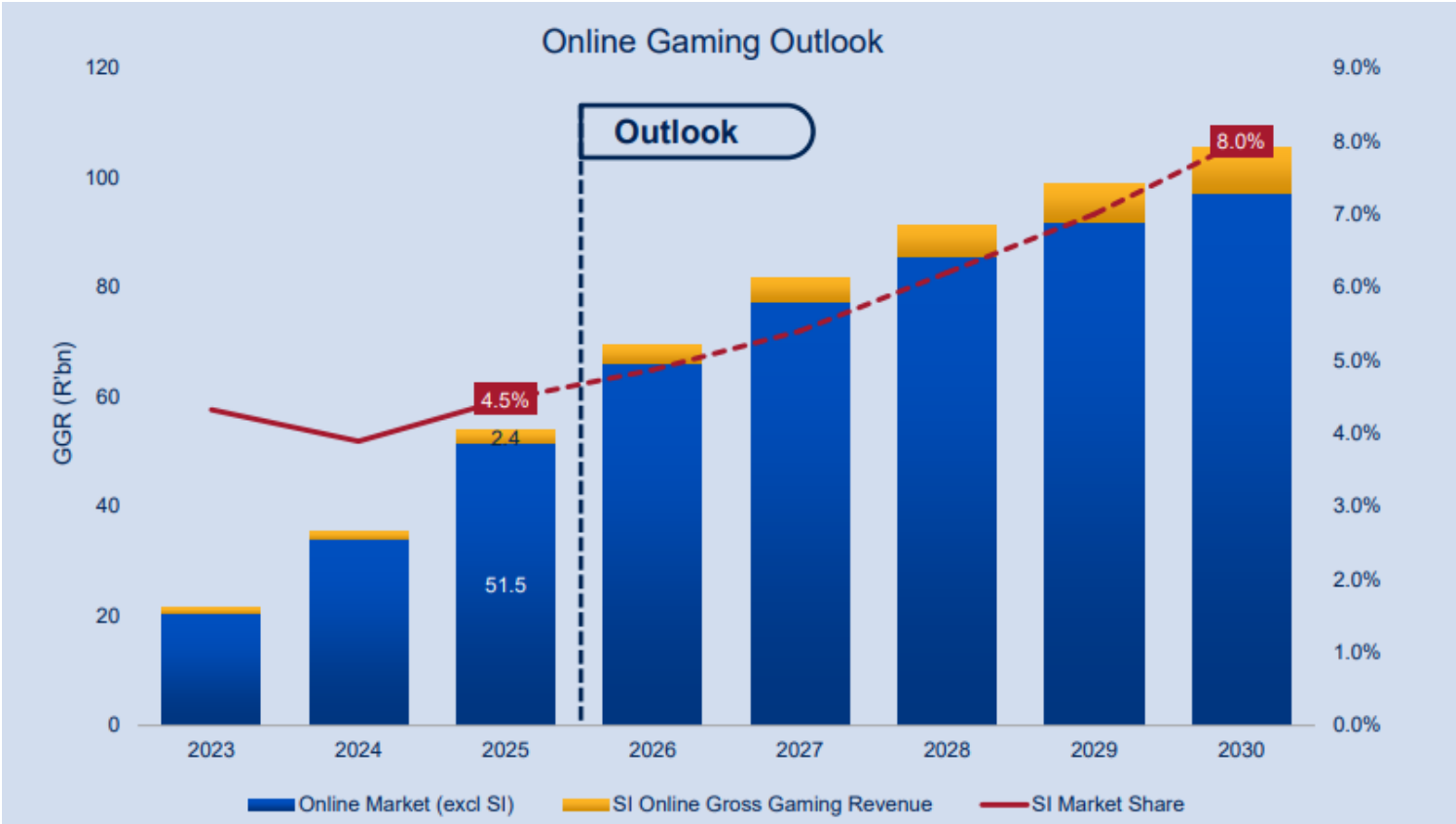


Source: Contrarius, British American Tobacco

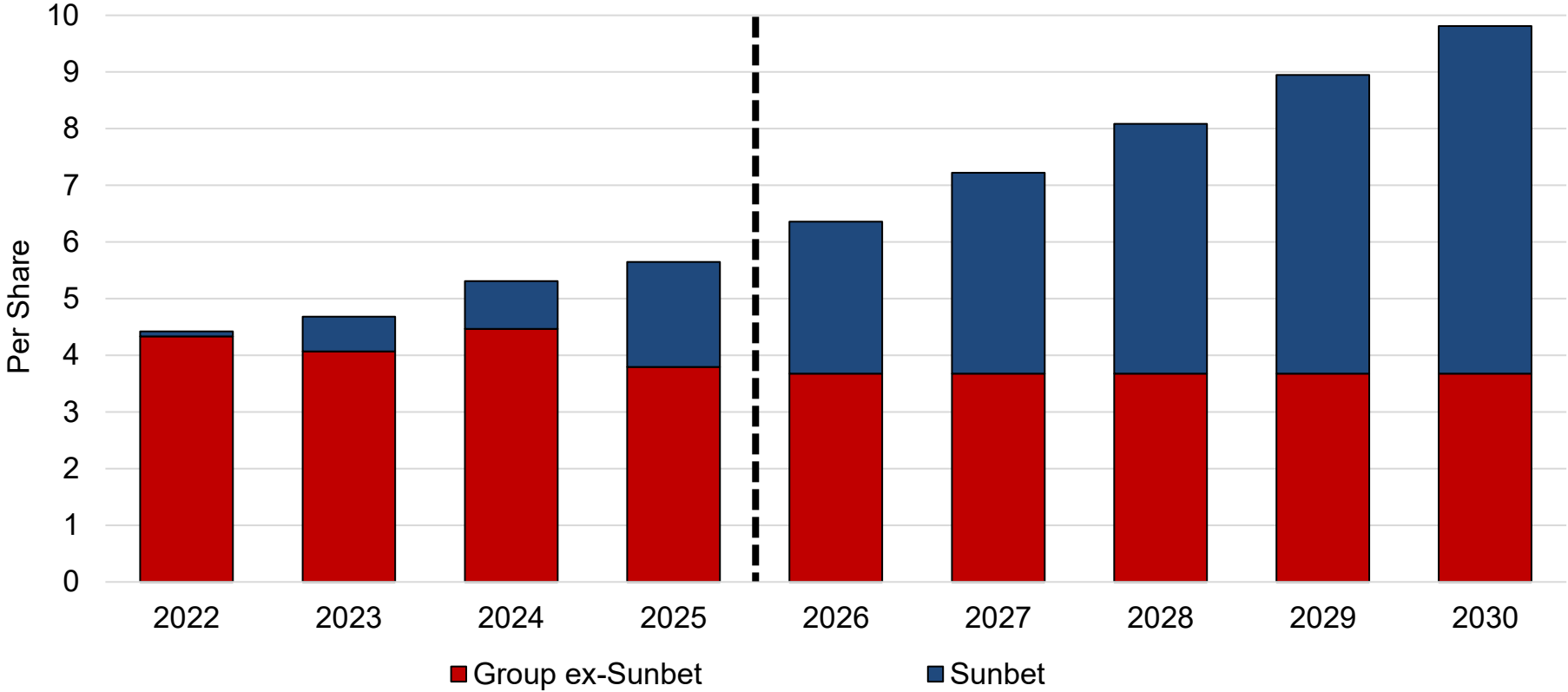
# South African Gaming Market Revenue per Market Segment



# Sun International | Online Gaming Outlook



# Sun International | Hypothetical EPS Implication



Assumes Sun International management projections for Sunbet and flat earnings for rest of the rest of the group  
Source: Contrarius



# Truly Contrarian.

Available through:

**s65 approved offshore Irish UCITS Funds**

Contrarius Global Equity Fund

Contrarius Global Balanced Fund

**Rand-based Feeder Funds**

BCI Contrarius Global Equity Feeder Fund

BCI Contrarius Global Balanced Feeder Fund

**Contrarius South Africa Funds**

Contrarius BCI Equity Fund

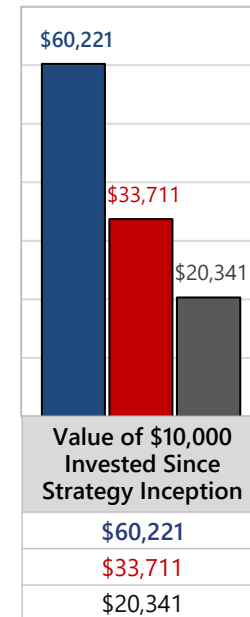
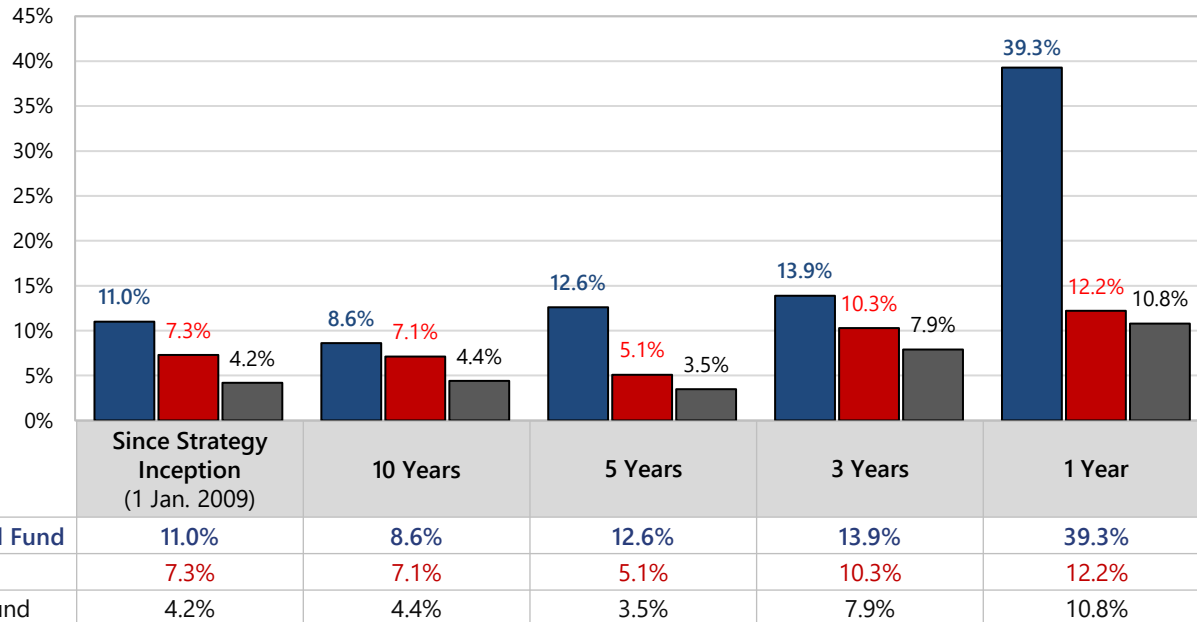
Contrarius BCI Balanced Fund

Contrarius BCI SA Equity Fund

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# Contrarius Global Balanced Fund – Performance Fee Class – Performance <sup>1-4</sup>



Contrarius Global Balanced Fund	11.0%	8.6%	12.6%	13.9%	39.3%
60/40 Index	7.3%	7.1%	5.1%	10.3%	12.2%
Average Global Balanced Fund	4.2%	4.4%	3.5%	7.9%	10.8%

1. Past performance is not indicative of future performance. The value of investments may go down as well as up and investors may not get back the amount invested. Contrarius Funds' share prices fluctuate and are not guaranteed. Returns may decrease or increase as a result of currency fluctuations. There is no guarantee that an investor's capital will be preserved. Returns of periods more than one year are annualised.
2. Performance to 31 March 2026, net of all fees & charges for the initial series of the Contrarius Global Balanced Fund – Performance Fee Class. Prior to its inception date, the performance of the Performance Fee Class is based on the performance of the Fixed Fee Class. The net returns of the Performance Fee Class apply its specified fee structure to the gross returns of the Fixed Fee Class. Best Calendar year return: 2009: 69.4% | Worst Calendar year return: 2018: -17.7%
3. The benchmark for the Contrarius Global Balanced Fund is a composite index comprising 60% MSCI World Index, including the reinvestment of net income, and 40% J.P. Morgan Global Government Bond Index, including coupons reinvested ("60/40 Index").
4. Average fund data source is © 2026 Morningstar Inc. The latest average fund index sourced from Morningstar is for 24 March 2026. To allow comparison of returns to a common date the average fund index has been extended to reflect the subsequent movement of the Benchmark Index. The Average Global Balanced Fund is comprised of US\$ Flexible Allocation funds which have a largely unconstrained mandate to invest in a range of asset types for a US\$-based investor as defined by Morningstar.
5. Source: Contrarius, Bloomberg

## Fund Particulars | Contrarius South Africa Funds

	Contrarius BCI SA Equity Fund	Contrarius BCI Equity Fund	Contrarius BCI Balanced Fund
<b>Investment Objective</b>	The Contrarius BCI SA Equity Fund is a domestic general equity portfolio that aims to provide long-term capital growth for investors.	The Contrarius BCI Equity Fund is a general equity portfolio that aims to provide long term capital growth for investors.	The Contrarius BCI Balanced Fund aims to balance capital growth, income generation and risk of loss, using a mix of assets.
<b>Benchmark</b>	FTSE/JSE Capped All Share Index, total return	70% FTSE/JSE Capped All Share Index, total return + 30% MSCI World Index, total return	42% FTSE/JSE Capped All Share Index, total return + 20% FTSE/JSE All Bond Index (ALBI) + 8% Alexander Forbes STeFI + 18% MSCI World Index, total return + 12% J.P. Morgan Global Government Bond Index
<b>Regulation 28</b>	No	No	Yes
<b>Offshore Exposure</b>	No offshore exposure.	Maximum of 45% offshore.	Maximum of 45% offshore.
<b>ISIN</b>	ZAE000338968	ZAE000338927	ZAE000338919
<b>JSE Code</b>	COSEFA	COBEFA	COBBFA
<b>ASISA Classification</b>	SA – Equity – SA General	SA – Equity – General	SA – Multi Asset – High Equity
<b>Launch Date</b>	30 September 2024	30 September 2024	30 September 2024
<b>Min. Investment Amounts</b>	None	None	None
<b>Annual Service Fee</b>	1.04% per annum (incl. VAT)	1.04% per annum (incl. VAT)	1.04% per annum (incl. VAT)
<b>Performance Fee</b>	20% of outperformance of the benchmark, subject to a high watermark	20% of outperformance of the benchmark, subject to a high watermark	20% of outperformance of the benchmark, subject to a high watermark
<b>Management Company</b>	Boutique Collective Investments (RF) (Pty) Ltd	Boutique Collective Investments (RF) (Pty) Ltd	Boutique Collective Investments (RF) (Pty) Ltd
<b>Investment Manager</b>	Contrarius South Africa	Contrarius South Africa	Contrarius South Africa
<b>Custodian / Trustee</b>	The Standard Bank of South Africa Ltd	The Standard Bank of South Africa Ltd	The Standard Bank of South Africa Ltd

## Fund Particulars | BCI Contrarius Feeder Funds

	BCI Contrarius Global Equity Feeder Fund	BCI Contrarius Global Balanced Feeder Fund
<b>Investment Objective</b>	The Feeder Fund aims to earn a higher total rate of return than the average of the world's equity markets, as represented by the MSCI World Index, including the reinvestment of dividends net of withholding tax. It aims to achieve this without greater risk of loss, over the long-term.	The Feeder Fund aims, over the long-term, to earn a higher total rate of return than an absolute return.
<b>Benchmark</b>	MSCI World Index, including the reinvestment of dividends net of withholding tax.	60/40 Index – The Benchmark is a composite index consisting of 60% MSCI World Index, including net income reinvested and 40% J.P. Morgan Global Government Bond Index, including reinvested coupons.
<b>ISIN</b>	ZAE000315834	ZAE000315826
<b>JSE Code</b>	BCIEFA	BCICFA
<b>Fund Type</b>	South African Collective Investment Scheme	South African Collective Investment Scheme
<b>ASISA Classification</b>	Global – Equity – General	Global – Multi Asset – High Equity
<b>Fund Inception</b>	30 December 2022	30 December 2022
<b>Min. Investment Amount</b>	None	None
<b>Fund Service Fee</b>	0.15% per annum (excl. VAT)	0.15% per annum (excl. VAT)
<b>Underlying Investment Management Fee</b>	Fixed Fee of 1.85% per annum	Fixed Fee of 1.25% per annum
<b>Management Company</b>	Boutique Collective Investments (RF) (Pty) Ltd	Boutique Collective Investments (RF) (Pty) Ltd
<b>Custodian / Trustee</b>	The Standard Bank of South Africa Ltd	The Standard Bank of South Africa Ltd
<b>Platform Availability</b>	Glacier, Momentum, Ninety One, PSG Wealth	Glacier, Momentum, Ninety One

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