

May 2025

Dear Valued Member,

Thank you for being a part of our community over the past year. Your membership with CFA Institute and CFA Society South Africa connects you to a vast network of global and local investment professionals, offering tools to elevate your career and uphold ethics.

It's time to renew your membership for another exciting year!

[Renew Now!](#)

Let's continue to set the standard for investment professionals in Southern Africa.

WELCOME TO OUR NEW CFA CHARTERHOLDERS - APRIL 2025

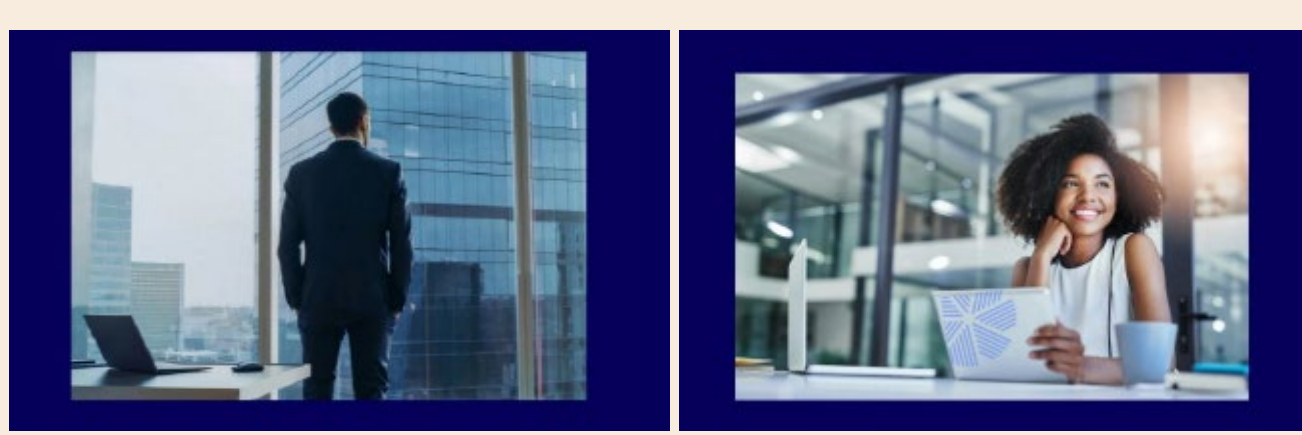


Congratulations to our new CFA charterholders

Thank you for being a part of a community of CFA charterholders committed to raising industry standards for the ultimate benefit of society.

Adrian Gläser	Mark Barry
Alexander Dominic da Silva	Rodger Paul Hill
Andrew Anderson	Satish Sooklal
Calum Kenneth	Shaun van Zyl
Chipiwa Mukono	Shaun-Lee Lahner
George de Bruyn	Sifiso Sibiya
Lancelot Nigel Tafadzwa Gasura	Simon Peter Katende
Liam Joshua	Siphokuhle Honest Zwane
Luther van Zyl	Tebogo Retsheditswe Motshumi
Malvern Murombedzi	Teko Mmolawa





ONLINE CPD PROGRAMME EVENTS

DRIVING A RESPONSIBLE INVESTMENT INDUSTRY

CFA Society South Africa and ASSA Masterclass: Navigating the Two-Pot System — Lessons from the Frontline

Join us for an insightful masterclass with **Michelle Acton**, Chief Customer Officer at Old Mutual Corporate and **Rob Southey**, Head of Asset Consulting at Momentum Corporate as they unpack the real-world impact of the Two-Pot Retirement System since its rollout.

This session will provide

- A comparison of expected vs. actual fund flows
- Key logistical and operational experiences
- An assessment of consumer education effectiveness and public response

Gain practical insights and lessons from industry experts as we evaluate how the system has performed and what it means for stakeholders going forward.

28 May 2025
13h00
A CPD Programme Event

[REGISTER HERE](#)

GIPS Webinar Series & Workshop Part 2 - Enhancing Trustee Governance with GIPS and Ethical Practices

Join **Chris Lourens**, a seasoned management consultant with an impressive 30-year tenure in the financial markets, including 24 years of practical experience with the Global Investment Performance Standards (GIPS), who will explore the role of GIPS in comparing investment managers and ensuring transparency.

Chris will also discuss how GIPS compliance:

- Enhances comparability
- Builds trust
- Promotes accountability

Additionally, he will discuss the ethical considerations and governance best practices for trustees, emphasising the importance of fiduciary duties and the application of the Pension Trustee Code of Conduct.

29 May 2025
13h00
1 Ethics and Practice Standards CPD Point

[REGISTER HERE](#)

BUILDING MARKET INTEGRITY

Let's Put Ethics into Practice

CFA Society South Africa invites you to take part in the **5th Annual Ethics Challenge for Investment Professionals in Southern Africa**.

Driven by CFA Institute, the Ethics Challenge is an annual competition for CFA charterholders and other investment industry professionals who will analyse a case study which contains a variety of ethical dilemmas.

The Challenge is designed to

- **Help participants gain ethical decision-making experience.**
- **Expose participants to real-world ethical dilemmas.**
- **Extend participants' professional networks.**
- **Provide participants a platform to discuss and debate the importance of ethics.**

[REGISTER HERE](#)

Save the Date - In person workshop Practical Applications of GIPS and Private Market Valuation

Provide practical tools and case studies on GIPS applications, focusing on AI, performance attribution, and private market valuation.

July 2025

In-person

Johannesburg

A CPD Programme Event

NEWS AND UPDATES

Save the Date! We are thrilled to announce that our **flagship Annual Investment Conference** will take place on **3 September 2025** at the Bay Hotel, Camps Bay, Cape Town.

The world is at an inflection point. Decades of established economic and political structures are being redefined, signalling a new playbook for investors to adapt to and businesses to navigate. Both locally and globally, external shocks are reshaping capital market expectations and asset pricing—creating new winners and losers in the process.

Under the theme **2025 Political and Economic Headwinds**, CFA Society South Africa will delve into these pressing issues and explore a range of perspectives and strategies at this year's conference. Stay tuned for registration details and group booking information — coming soon!

CONNECT

For further information and enquiries, contact Thando Mlambo

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COMPLIMENT? SUGGESTION? COMPLAINT?



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