



Dear Valued Member,

Thank you to all our members who have successfully renewed their 2024-2025 membership. Please note if you have not renewed, your membership will lapse on 16 September 2024. Lapsed members may not use their designation, so **renew today**. Be sure to update your details when you renew, so we can connect with you.

CFA Society South Africa would like to take the opportunity to recognise and celebrate our female members this Women's Month. The Society continues to put a spotlight on Women in Investment Management through a variety of long-term initiatives.

Thank you to all members who completed the member survey and helping us in delivering on the society's mission and vision and adding value to our members. We appreciate your support and encourage your participation.

July Highlights



CFA Society South Africa hosted a networking event to recognise the new CFA charterholders, volunteers and CFA community in Malawi.

THANK YOU & FAREWELL



We bid farewell to three of our Board members. We would like to thank them for their immense contribution and dedication to the growth and success of CFA Society South Africa. **Caroline Cremen, CFA**, and **JD Van Wyk, CFA** who have served the Board for 6 years and **Thomas Chataika, CFA** who has been with the Board for 2 years.

DELIVERING MEMBER VALUE

We are delighted to host our Annual Investment Conference in Johannesburg on the **5th of September**. Register Now and receive a membership discount – [Register here](#)



2024 Annual Investment Conference

Global Election Year Investors at the Polls

5 September 2024 | The Houghton Hotel, Johannesburg

Agenda

Time	Item	Speaker
09h30 - 09h35	Welcome address	Thato Mashigo , Vice President of CFA Society South Africa Fifi Peters , Award Winning Financial Journalist and Broadcaster
09h35 - 09h45	A Word from the Society President	Jennifer Henry , President of CFA Society South Africa
09h45 - 10h45	Local Speaker	TBC
10h45 - 10h55	10min Tea Break	
10h55 - 11h55	Classic Debate Artificial Intelligence Will Transform the Global Economy	Dr Musa Malwandla , Co-Founder at Differential Capital Viwe Tini , CEO at Vunani Securities Iqeraam Peterson , Head of Private Debt at Futuregrowth Moderator: Patrice Rassou , CIO at Ashburton Investments
11h55 - 12h10	15min Tea Break	
12h10 - 13h10	Fireside Chat	TBC
13h10 - 14h10	Lunch	
14h10 - 15h10	Panel Discussion South Africa: Future Prospects	Annabel Bishop , Chief Economist at Investec Sanisha Packirisamy , Economist at Momentum Investments Nomvuyo Guma , Chief Director Microeconomic Policy at National Treasury Moderator: Fifi Peters , Award Winning Financial Journalist and Broadcaster
15h10 - 16h10	Virtual Key-Note Speaker Building an efficient portfolio in inflationary times	Louis-Vincent Gave , Founding Partner and CEO of Gavekal
16h10 - 16h20	10min Tea Break	
16h20 - 17h20	Virtual Key-Note speaker The India Opportunity	Rajesh Sehgal , Managing Partner at Equanimity Investments
17h20 - 17h30	Closing Words	
17h30 - 19h30	Cocktail reception	

WEBINARS, NEWS AND UPDATES

MITIGATING GREENWASHING RISKS WEBINAR

At the end of 2023, The Board of the International Organisation of Securities Commissions (IOSCO) published a report outlining Supervisory Practices to Address Greenwashing. While some greenwashing challenges are being addressed, it remains a fundamental market conduct concern that poses risks to both investor protection and market integrity. Countering these risks is not an easy task given that greenwashing can take different forms and can vary in scope and severity, occurring throughout the investment value chain. During the webinar we will discuss these challenges and market behaviours; and we will discuss how the CFA Disclosure Standards aims to mitigate these issues.

Join **Sonal Bhagwan, CFA** and **Imelda Watkins, CAIA**, with moderator **Jennifer Henry, CFA**.

20 August 2024

13h00 (SAST)

A CPD Event

[Register here](#)

2024 ETHICS CHALLENGE FOR INVESTMENT PROFESSIONALS

Congratulations to **Team JSE Wolf Pack**; **Genevieve Chetty CA(SA)**, **George Chasara**, **Nishkar Bhageloo**, **Njabuliso Mkhabela**; **Prince Ken Nkiwane**, Winners of the 2024 Ethics Challenge for Investment Professionals.

Well done to all the participating teams for their hard work and dedication.

Thank you to all the participants, viewers and judges; **Jon Stokes**, Director, Professional Standards at CFA Institute, **Carmen Forster, CFA**, General Manager: Claims & Operations for the Old Mutual Short-Term Insurance Company (Namibia) Ltd, **Aubrey Chewe, CFA**, Professor at Arthur Portland College, **Byron Jankeeparsad, CFA**, Financial Sector Analyst at FirstRand Group and **One Elsie Giddie, CFA**, Portfolio Manager at Novare Investment Solutions, for their support as we continue to raise knowledge and awareness of ethics and ethical considerations in acts/behaviours of practitioners in the Southern African investment industry.

PARTICIPATE IN THE KRUTHAM TOP INVESTOR RELATIONS SURVEY

Investment analysts and professional investors have your say in the Krutham Top Investor Relations Survey. Your input is crucial in assessing and improving the quality of investor relations at JSE-listed companies. This survey, now in its third year, is a vital resource for IR teams to understand market feedback.

Your input culminates in the Top Investor Relations Awards and is vital for developing insightful trend data. Spare 15 minutes to share your experience and contribute to better engagement, accessibility, and transparency with listed companies. To acknowledge your time and input, Krutham will donate R100 to a charity of your choice.

Deadline: Friday, 30 August

[Take the survey here](#)

FINANCIAL MAIL TOP ANALYST AWARDS 2024

CFA Society South Africa is proud to support this initiative, with our continued participation in the judging of the Young Analyst Award. Well done to **Tinashe Hofisi**, Equity Research Analyst at SBG Securities, winner of the 2024 Young Analyst of the Year award.

Special thanks to our judges, **Caroline Cremen, CFA**, CFA Society South Africa Board Member and Private Client Portfolio Manager at Adviceworx, **Nadeem Hoosen, CFA**, Portfolio Manager at STANLIB- Multi Manager/INN8 Invest, **Shamier Khan, CFA**, CFA Society South Africa Board Member and Client Director at Ninety One, **George Ndindi CFA**, Manager at The Reserve Bank of Malawi, **Lungile Luvuno, CFA, CA(SA)**, Assistant Portfolio Manager at EPPF, **Ruan Koch, CFA**, Investment Analyst at Coronation Fund Managers and **Audrey Mashoko, CFA**, Valuations Manager at W.Consulting

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CONNECT
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