



**Independent
Securities**

Your Investment Partner

Client Brochure

The path to wealth is a journey
and we're here to walk it with you.
Every step of the way.

isec.co.za

Member of the JSE. Authorised Financial Services Provider.

About Our Investment Firm

Established in 1998 as a JSE member, Independent Securities has steadfastly evolved into a leading boutique asset manager. Our journey, reminiscent of the penguin's resolute march, has been marked by adaptability, resilience, and an unwavering focus on our mission.

Being privately owned has fortified our commitment to focusing on our client's aspirations and financial wellbeing.

Our interests are aligned with our clients and we are deeply invested in the pursuit of long-term wealth generation. This dedication ensures that we safeguard, nurture and grow our clients' investments.

As the penguin masters harsh Arctic environments, Independent Securities expertly navigates the complex waters of investment, ensuring you always have a clear path to your financial goals.

Our Investment Philosophy



Excellence in Selection

We prioritise investments in businesses with exceptional and sustainable models. Quality is our hallmark.



Commitment to the Long Haul

Our strategy is built on longevity. We believe in buying and holding companies indefinitely, a key to superior investment performance.



Concentration for Impact

Our focused portfolios, typically holding 15-25 shares, ensure that our high-conviction ideas lead to meaningful investment outcomes.



Valuation Driven

Capital is committed only when the purchase price is not just attractive but set to deliver strong long-term returns.



Steering Clear of Market Timing

We avoid market timing, recognising the risks of opportunity costs, higher fees, and tax implications.



Fundamental Stock Picking

Our bottom-up approach meticulously selects businesses that align with our philosophy, enhancing portfolio performance.

Our Financial Solutions

Wealth Planning

Unit Trusts

Investment Management

Investment Administration

Stockbroking

Cash Management

Our Investment Suite

Bespoke Share Portfolios	Key Features	Benefits
Ideal for discerning investors seeking a personalised equity investment approach, ensuring their portfolio is a genuine reflection of their financial ambitions.	<ul style="list-style-type: none"> • Personalised Strategy • Diverse Selection of Assets • Active Management 	<ul style="list-style-type: none"> • Exclusive Focus • Robust Growth Potential • Transparent Reporting
Endowments	Key Features	Benefits
Perfect for those with a long-term financial outlook, seeking a systematic wealth accumulation method while enjoying the option of geographical diversification.	<ul style="list-style-type: none"> • Fixed Investment Term • Tax Efficiency • Investment Flexibility 	<ul style="list-style-type: none"> • Structured Savings Approach • Liquidity Options • Estate Planning Advantage
Pre-Retirement Savings	Key Features	Benefits
Ideal for individuals at any stage of their career, looking to prioritise their retirement savings and build a considerable financial reserve for their golden years.	<ul style="list-style-type: none"> • Diverse Investment Options • Tax Efficiency • Flexible Contributions 	<ul style="list-style-type: none"> • Future Security • Financial Discipline • Adaptable
Post-Retirement Savings	Key Features	Benefits
Ideal for retirees seeking a post-retirement income solution that offers both flexibility and the potential for continued capital growth.	<ul style="list-style-type: none"> • Flexible Income Streams • Investment Autonomy • Estate Planning Advantage 	<ul style="list-style-type: none"> • Customisable Withdrawals • Continued Capital Appreciation • Free from Reg 28 Constraints
Collective Investment Schemes	Key Features	Benefits
Perfect for all investors looking for a cost-effective and diversified investment solution, offering access to expertly managed portfolios across geographies.	<ul style="list-style-type: none"> • Professional Fund Management • Accessibility • Tax Efficiency 	<ul style="list-style-type: none"> • Enhanced Investment Diversification • Cost Effective Wealth Building • Global Exposure
Tax Free Savings Accounts	Key Features	Benefits
Individuals seeking an efficient savings avenue that couples the strength of investment growth with the advantage of tax-free returns.	<ul style="list-style-type: none"> • Tax Exemptions • Investment Flexibility • Annual & Lifetime Contribution Limits 	<ul style="list-style-type: none"> • Pure Growth • Long-Term Potential • Flexible Access





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Our clients enjoy a personal relationship with our portfolio managers. Converse directly with the individual responsible for your investment decisions at any time.

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