FUNDHUB
INDUSTRY PERFORMANCE AWARDS

FundHub Industry Performance Awards Criteria

The FundHub Industry Performance Awards are guided by clear and rigorous criteria to ensure fairness, transparency, and excellence in recognising “best in class” investment performance within the South African investment industry. Only select ASISA categories are eligible for awards. These categories are the most popular sectors in terms of assets and market demand.

Advisory Committee

To ensure objectivity and expertise in the adjudication process, the FundHub Industry Performance Awards has constituted an Advisory Committee that operates on a two-year rotation. The committee consists of representatives from senior key stakeholders in the investment industry. The committee members work alongside The Collaborative Exchange to validate nominations, ensuring the awards maintain the highest standards of integrity.

Retail Unit Trusts Criteria

To qualify for the FundHub Industry Performance Awards, Retail Unit Trusts must meet the following requirements:

- Fund Size: The fund must have an AUM of more than R500 million.
- ASISA Category Stability: The fund must not have changed its ASISA category in the past three years.
- Inclusion of Passive and Active Funds: The awards are open to all funds within the relevant ASISA categories, including passive and active funds.
- Inclusion of DFMs and Multi-managers: All DFMs and Multi-managers may participate in the awards through a retail unit trust, and all other criteria is met.
- Retail Fee Class Funds: Only retail fee class funds will be considered. These funds must also be available on at least two investment platforms (LISP’s) in South Africa.

Retail Hedge Funds Criteria

Retail Hedge funds must adhere to the following criteria to be eligible for recognition:

- Fund Size: The fund must have an AUM of more than R150 million.
- ASISA Category Stability: The fund must not have changed its ASISA category in the past three years.
- Minimum Fund Count: An award will only be granted if at least five funds qualify within the category.
- Retail Fee Class Funds: Only retail fee class funds will be considered for the awards. These funds must also be available on at least one investment platform (LISP) in South Africa.

Fund Methodology

- All data for calculations is supplied by Iress.
- Data integrity is the responsibility of the fund manager. It is the fund managers responsibility to make sure that the correct fee classes are available on Iress.
- All data will be at 31 December 2026.
- All retail unit trusts will be measured on straight line performance.
- Hedge fund categories will be measured on straight line performance with a risk-adjusted overlay.

Linked Investment Service Provider Criteria

- Must be a FSCA registered and licensed LISP under FAIS (Category III) and compliant with all statutory reporting.
- Have at least a minimum of 3 years operational data as of 31 December 2026.
- Must have at least R5 billion in administered AUM.
- Must offer access to a minimum number of 50 ASISA approved CIS funds.

Linked Investment Service Provider Methodology

These awards will be selected by means of an industry survey to The Collaborative Exchange database. This database is made up of financial advisors, wealth managers, tied agents, bank brokers, private bankers, discretionary fund managers and multimanagers as well as asset consultants. Weightings are attributed to each category, depending upon the discretionary mandate afforded by these constituents. The Best partner award will only be determined by asset manager representatives and discretionary fund managers only. Each award category will be rated on a 7 point rating system.

Awards

- There will be 31 fund manager awards awarded in 2027. This will include the category winners and runner-up's.
- There will be 4 linked investment service provider awards awarded in 2027. Only a winner for each category will be announced.
- In addition to this, there will also be awards for:
- Best overall platform: This award is in a combination of the 4 sub-awards creating an overall winner.
- Advisor Choice Award: This award will be selected by means of an industry survey via The Collaborative Exchange database. This database is made up of financial advisors, wealth managers, tied agents, bank brokers, private bankers, discretionary fund managers and multimanagers as well as asset consultants. Weightings are attributed to each category, depending upon the discretionary mandate afforded by these constituents.
- Moneyweb Best Overall Linked Service Provider will be a weighted scoring on each of the applied categories (Best advisor support and service, Best use of technology, Best investment offering, Best partner for asset managers/DFM's)

- Moneyweb Best Overall Fixed Income Manager: In order to qualify for this award, the fund manager needs to manage funds across Interest Bearing (Short term and Variable) and SA Multi Asset Fixed Income ASISA categories over the longer dated award period.
- Moneyweb Best Overall Fund Manager: In order to qualify for this award, the fund manager needs to manage funds across a minimum of five ASISA categories over the longer dated award period.