

# FACT SHEET

## JANUARY 2018

### About Alexander Forbes Group

Alexander Forbes Group's roots go back more than 80 years – to the first half of the twentieth century. Since then, Alexander Forbes has grown into a leading pan-African company, with businesses in eight countries including Africa and Europe. In South Africa, our largest market, the Group is the leader in retirements, employee-benefit consulting and outcomes-based investment management. Today, Alexander Forbes is one of Africa's leading financial services organisations, providing retirements, asset management, insurance and wealth management. Alexander Forbes never loses sight of its purpose to help customers achieve a lifetime of financial well-being and security.



### Group at a glance

1.4 million



Customers



> 3 500  
Talented people

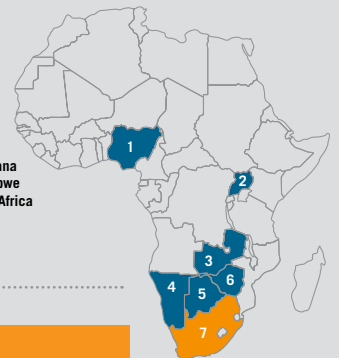


R1.6 billion  
payout in claims  
R24.1 billion  
in benefit payments

pan-African  
footprint

1 Nigeria  
2 Uganda  
3 Zambia  
4 Namibia

5 Botswana  
6 Zimbabwe  
7 South Africa



“Our Ambition 2022 strategy is about being truly customer centric and putting the customer at the center of our value proposition”

Group Chief Executive,  
Andrew A. Darfoor

#### Strategy

##### Value proposition

To help customers achieve a lifetime of financial well-being and security.

##### Ambition

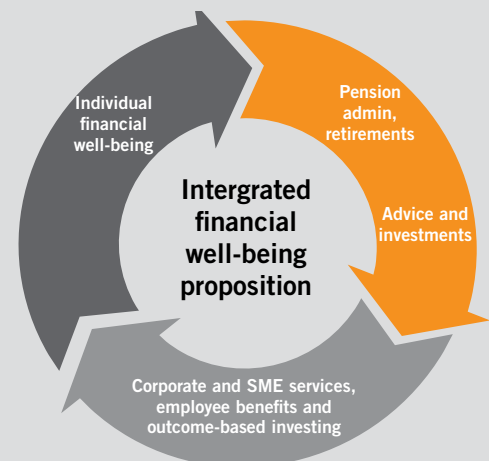
To become a globally distinctive pan-African financial services leader.

##### Commitment




To act responsibly and to create positive impact for all our shareholders.



##### Strategic objectives

Our five strategic objectives support our Ambition 2022 strategy to be a trusted partner for financial well-being solutions at every stage of life.



# Alexander Forbes' retirement research

-  Aging and addressing the retirement gap is one of the key trends Alexander Forbes thinks will shape life insurance and pensions in the future.
-  In a world in which longevity is increasing, governments in many countries are coming under increasing strain to meet the costs associated with an aging society.
-  Traditional ways of looking at retirement are changing. People see retirement as an active stage of life in which they aspire to stay socially connected, involved in their communities, and continue to work in some capacity.

-  These changes require that individuals accept more personal responsibility for retirement. An enjoyable retirement requires careful financial planning as well as the maintenance of good health.
-  Alexander Forbes' own research confirms, that people continue to fall short in retirement planning and are in greater need of a trusted financial partner to help them make smarter choices.



## Stock information

Alexander Forbes ordinary shares: Traded in Johannesburg (JSE) since 2014 and quoted in Rand

Alexander Forbes Group Holdings Limited	
Ticket symbol	AFH
ISIN	ZAE000191516
REG NO:	2006/025226/06

Significant Shareholders (September 2017)	
Marsh & McLennan Companies	33.01%
African Rainbow Capital	8.44%
Allan Gray	6.01%
Public Investment Corporation	5.55%
GIC Private Limited	5.17%
Stanlib Asset Management	5.16%

## Fast facts Alexander Forbes Group



**Head Office**  
Sandton, Johannesburg  
South Africa



Andrew A. Darfoor  
**Group Chief Executive**



Naidene Ford-Hoon  
**Group Chief Financial Officer**

### Main brands



### Main business lines

Retirements, Asset Management,  
Insurance and Wealth Management

### Main distribution channels

Advisers, brokers, agents, online distribution,  
worksite and direct marketing

### Information

Further information  
on Alexander Forbes  
Group can be found on  
[www.alexanderforbes.co.za](http://www.alexanderforbes.co.za).

### Contact

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