



INVESTMENT PHILOSOPHY



ABOUT US

Kuza Asset Management is a boutique investment manager based in Nairobi, Kenya. We are focused and passionate about powering your future. Our mission is to assist clients in maximizing the impact of their investments.

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INVESTMENT OBJECTIVE

Our client focus means that the overall investment goal is to achieve the best return but at reasonable risk. We believe a skillful investment manager prioritizes loss prevention over unjustifiable risk-taking. To improve the risk profiles of our portfolios, we focus on liquid markets, have a long-term investment horizon, and zero in on quality.

OUR APPROACH



CLIENT FOCUS:

Our clients come first. Integrity and ethics are our core values. We take our fiduciary duties seriously and put risk management at the forefront of all we do. We maintain a high level of client communication in line with our promise of a high level of transparency.



LONG-TERM VIEW:

We have a long view when it comes to investing on behalf of our clients. Portfolios created to last are safer and serve investors better. Our investment processes are driven by discipline, focus and logic to limit bias and emotions in our decision making.



COST & TAX EFFICIENCY:

Returns are unpredictable, but expenses are not, so we minimise costs. At the heart of what we do is efficiency. At Kuza Asset Management, we primarily use a core-satellite approach to achieve our fiduciary duties. A core-satellite path minimises cost, improves tax efficiency and diversifies risk.

OUR INVESTMENT PROCESS

1. RESEARCH

Team generates insight and outlook.

5. CLIENT REPORTING

Clients receive performance updates.

4. PERFORMANCE MEASUREMENT & MONITORING

Portfolio Manager monitors investments continuously and rebalances as and when necessary.

2. INVESTMENT COMMITTEE

Committee does Asset Allocation and security selection.

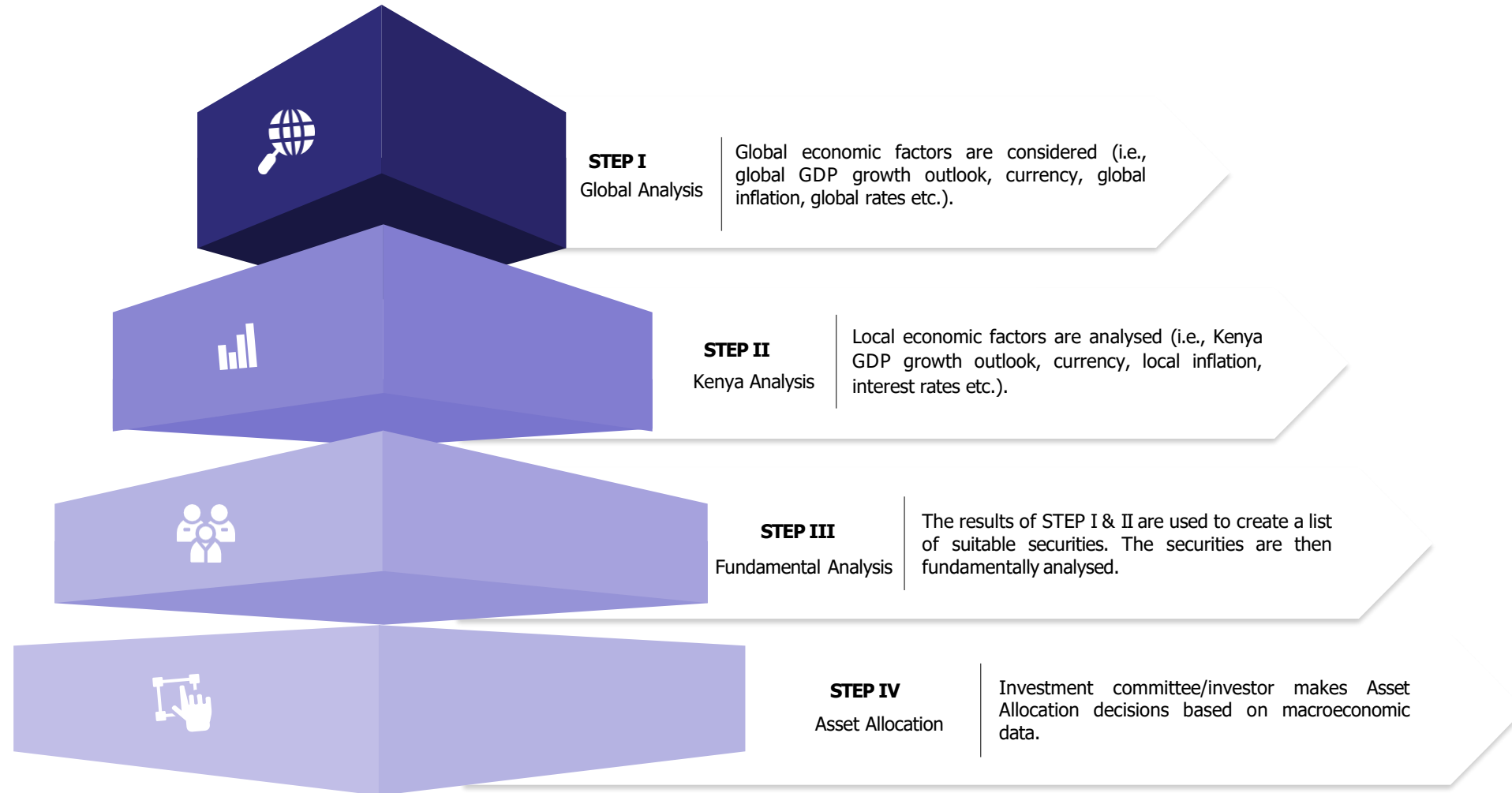
3. EXECUTION

Dealer actualises the committee decisions.



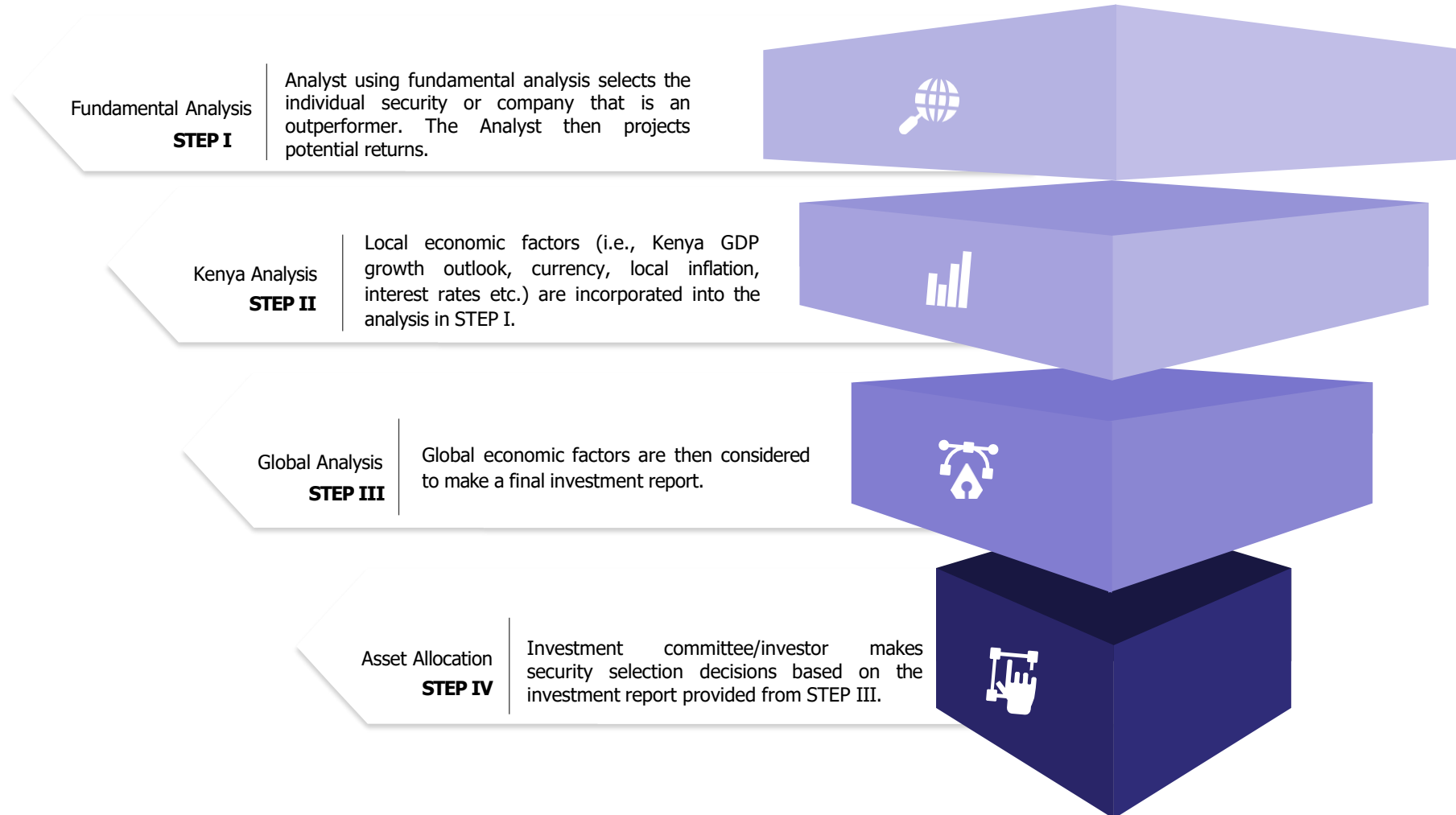
OUR TOP-DOWN INVESTING PROCESS:

Top-down dominates our investments as it maximises risk-adjusted returns



OUR BOTTOMS-UP INVESTING PROCESS:

Complements our Top-down approach to ensure we don't miss great companies



CORE BELIEFS...I



ASSET ALLOCATION COMES FIRST:

Asset Allocation holds the key to unlocking long-term competitive returns for our clients. Asset Allocation is also an avenue to manage and diversify investment risks for our portfolio. We focus our efforts and energy on optimizing our asset allocation strategy to suit the risk profile of Kuza's customers.



TOP-DOWN RULES:

A Top-down focus allows us to maintain a big picture of the investments under our oversight. The investment outcome of our Top-down bias is a more long-term but repeatable portfolio construction that serves our clients better.



MARKETS ARE SEMI-EFFICIENT AT BEST:

Capital markets can become inefficient at pricing information. Markets sometimes reflect fear, investor crowding, and overexuberance. Our investment process takes advantage of any market's inability to price effectively in the short term.

CORE BELIEFS...II





Kuzza
ASSET MANAGEMENT

