



OLDMUTUAL

CIGFARO REVENUE SOLUTIONS SUMMIT 2018

OLD MUTUAL LIMITED



DO GREAT THINGS EVERY DAY



About Old Mutual Limited

- Old Mutual Limited is Anchored in Africa!
- One of the largest and most trusted financial services provider in Southern Africa
- Deep roots in South Africa – 173 years of expertise that creates real value for society
- We provide financial solutions to individuals, small- and medium-sized businesses, corporates and institutions across several market segments and geographies in South Africa, the Rest of Africa and certain other emerging markets.
- Our purpose is to help our customers thrive by enabling them to achieve their lifetime financial goals, while investing their funds in ways that will create a positive future for them, their families, their communities and broader society.

Savings &
Protection

Investments

Lending



Old Mutual Limited: Our Role in Society

RESPONSIBLE INVESTMENT ¹

- R15.1 bn invested in affordable housing
- R61.4 bn invested in other infrastructure
- R22.1 bn invested in renewable energy
- R1.0 bn spent on sustainable agriculture
- R1.9 bn invested in Small, Medium and Micro-sized Enterprises financing

CUSTOMERS ²

- Enabling positive futures for 11.3 m³ customers
- R6.0 bn risk and protection claims paid
- R3.3 bn Property and Casualty claims paid
- R7.8 bn pensions paid
- R1.1 trn total funds under management
- 400 000 Money Accounts opened to date
- Ranked No. 1 in Life Insurance category of the 2017/2018 Ask Afrika Icon Brands survey, for 4th consecutive year



EMPLOYEES ¹

- 28 145 employees across 17 emerging markets
- Retaining Level 2 B-BBEE status for 8th year in a row
- Ranked as No 1 Top Employer in South Africa and Ghana; also ranked as Industry leader in financial services & insurance for 7th year in a row
- Certified as a Top Employer in all the countries in Africa in which we operate

SOCIO ECONOMIC DEVELOPMENT ¹

- 408 000 attendees of financial education workshops
- R40 m committed to the SA SME Fund launched by the CEO Initiative
- R500 m committed to a ring-fenced Enterprise Supplier Development Fund
- R164 m invested in community programmes:
 - R21 m in financial education
 - R74 m in education
 - R69 m in skills and community development

¹ Figures as at 31 December 2017

² Figures as at 30 June 2018

³ Excludes customers in Latin America, which is in the process of being sold



Old Mutual Financial Wellbeing Programmes

A highly effective financial education and support programme aimed at helping South Africans take control of their finances. Combines educational workshops, individual financial health assessments, member support services and accredited financial advice with modules pitched at attendees' financial knowledge.

ON THE MONEY

- Programme that presents five basic principles of good money management using an analogy of the Big 5 animals found in South Africa.
- SAQA / Bankseta accredited & NQF aligned
- Available in 11 languages
- Focused behavioral change to break the cycle of generational poverty

FIN360°

- Holistic financial education programme for managers, executives and professionals
- Emphasis on the need for financial planning, wealth creation and wealth preservation.
- Pitched as a follow up to On the Money
 - Financial planning; Retirement Planning; Wills & Estate Planning; Fund Member Education; Risk Management; Investment Planning; Wealth and your business; Leaving a Retirement Fund



Conclusion

Old Mutual's Ongoing Commitment to KZN:

Growing together

Investing together

Building together

Do Great Things Everyday!

OLD MUTUAL

THANK YOU!



DO GREAT THINGS EVERY DAY