



## **The New etfSA Investor Hub**

Some investors have now become aware of the new digital investment platform that etfSA.co.za has launched for clients who wish to transact online in any ETFs/ETNs listed on the JSE.

The online platform has been taken over from CoreShares, who have been operating this platform since 2017. Up until now, this platform has only been available to investors wishing to transact in the **ETFs issued by CoreShares**.

**Now**, this platform enables any investor to transact in **all** the ETFs/ETNs on the JSE and not only CoreShares products.

etfSA.co.za has taken over the operation and ownership of this digital platform from CoreShares and has spent some time developing it further to now embrace all ETPs available in South Africa, whilst keeping all the functions and ease of operation that has made the CoreShares a favourite amongst local investors.

It is a very client focussed internet-based investment platform, easy to open accounts and to manage additional investments, debit orders, etc.

**The intention is to make the etfSA Investor Hub the first choice for discretionary investments in ETFs/ETNs in South Africa.**

Please note that the Investor Hub is entirely operated by etfSA.co.za, and its administration partner, Wealthport, and there is no involvement at all with Automated Outsourcing Services (AOS), or any other administrator.

## HOW TO BECOME AN ETFSA INVESTOR HUB INVESTOR

### CoreShares Online

If you are an existing **CoreShares Online account holder**, when you visit the CoreShares website ([www.invest.coreshares.co.za](http://www.invest.coreshares.co.za)), you will be directed to the migration route to switch your investment to the etfSA Investor Hub.

#### **What stays the same?**

- Costs will remain unchanged for existing CoreShares Online clients for a minimum of 12 months
- The central functionality of the investment platform remains the same
- Your current portfolio composition and ongoing instructions do not change.

#### **What does change?**

- CoreShares client now have access to any ETP issued by the eight different issuing houses in South Africa, considerably widening your choice of investments.
- You have access to the full services provided by etfSA.co.za website, including the data bases, watchlists and financial advice, if required.

### AOS

For etfSA clients in the etfSA Investor Plan, which is administered by AOS, you can open an account with the etfSA Investor Hub (<https://invest.etfsa.co.za/#/>), completely online and send digital instructions, etc. and we will arrange the transfer of your existing holdings of ETPs from AOS to the Investor Hub.

### Costs

The annual costs payable in the etfSA Investor Hub are as follows:

<b>Annual Management fee</b>	0,50% of portfolio value
<b>Transaction costs</b>	0,10% brokerage charge
<b>Financial advice (if required)*</b>	0,50%
<i>* A separate mandate is signed for the advice service.</i>	

These costs are all subject to VAT of 15%.

## NEW CLIENTS

You can open a completely new investment account on the etfSA Investor Hub (<https://invest.etfsa.co.za/#/>) in a few minutes, everything is digital including your signature, uploading of FICA documents, etc. All future investment instructions can be done online.

Every effort has been made by the developers of the etfSA Investor Hub to protect the security of investors' information through unique OTPs, passwords and other checks and balances built into the platform.

Investments can be made from R300 per ETP, whether monthly by debit order or for lump sum investments by a bank deposit or EFT transfer. Brokerage rates of 0,10% are charged on all ETF transactions you undertake.

You have full access to the wealth of data on the etfSA website, which is the most comprehensive ETP database in South Africa. You also have access, if an advisory mandate is signed, to all the expertise and knowledge built up over the years by etfSA.co.za, the ETF specialists™.



Invest with the ETF specialists™  
ETF Investments for:

- Individuals
- Tax Free
- Stokvels
- Retirement
- Managed Portfolios

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If you have any queries on the new etfSA Investor Hub, please contact:

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To view a **podcast** discussion between Gareth Stobie (CoreShares) and Nerina Visser & Mike Brown on the transfer of the platform from CoreShares to etfSA.co.za, click [here](#).