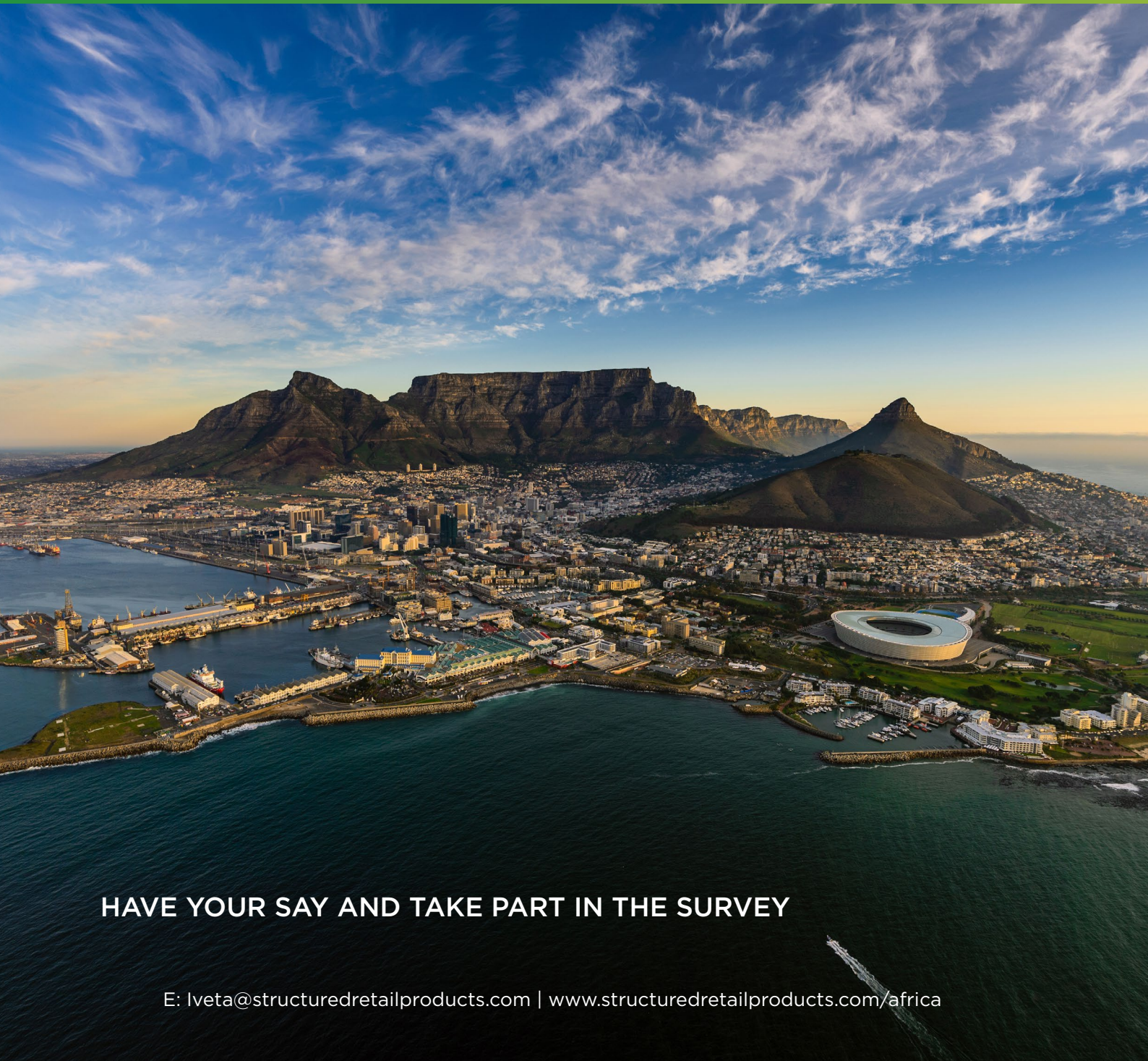


# SRP AFRICA 2019 AWARDS METHODOLOGY

Survey: 22 October - 30 November 2018



**HAVE YOUR SAY AND TAKE PART IN THE SURVEY**

E: [Iveta@structuredretailproducts.com](mailto:Iveta@structuredretailproducts.com) | [www.structuredretailproducts.com/africa](http://www.structuredretailproducts.com/africa)

# Categories

www.StructuredRetailProducts.com's (SRP's) Africa Ranking acknowledges the best manufacturers, distributors and service providers in the following categories:


Manufacturers:	Distributors/ Private Banks:	Service Providers:	Other Awards:
Best House, Africa	Best Distributor, South Africa	Best Index Provider	Best Educational Initiative
Best House, Equities	Best Distributor, Mauritius	Best LISP Platform	Personality of the Year
Best House, Multi-Asset	Best Performance, South Africa	Best Law Firm	Best Financial Advisor/ Wealth Management Firm
	Best Performance, Mauritius	Best Proprietary Index Provider	Deal of the Year
	Best Offshore Distributor	Best Exchange	Best ETF House
		Best Technology Platform	

## SCOPE OF DATA:

SRP defines structured products as investment vehicles that provide risk-and-return profiles with returns referenced to one or more underlying assets.

## AWARD METHODOLOGY - GENERAL RULES:

- SRP will conduct a comprehensive analysis of institutions associated with Structured Products, ETFs and the alternative investments space between October 22nd and November 30th.
- Respondents will vote for various awards under the categories of manufacturers, service providers and other awards, whose results will be independently verified by SRP.
- Distributor awards are based on SRP's proprietary database and submission of product data by the candidates covering from August 1st, 2017 and September 30th, 2018.
- Some awards will involve a 400-word, editorial submission with winners determined by a panel of independent judges.



“Fantastic event! We need many more to upskill advisers and clients...”

**HARBOUR WEALTH**

“ Great event to catch on all the latest developments in the market”

**MMI HOLDINGS**

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# MANUFACTURER AWARDS

Manufacturers will be rated by volume sold, and the TOP 5 manufacturers by volume will be shortlisted to win the award.

The winner will be chosen from the shortlist according to two factors:

## SURVEY OF MARKET (80% WEIGHTING)

Buy-side respondents will rate each manufacturer across all asset classes on qualitative factors:

- Price Competitiveness (40% weighting)
- Innovation and Structuring Capability (30% weighting)
- Understanding Client Needs & Aftersales Support (10% weighting)

## INDUSTRY PEER REVIEW (20% WEIGHTING)

Each manufacturer will name the top three manufacturers (apart from itself) for each award category.

	Survey of Market	Industry Peer Review	Industry Peer Review
Best House, Africa	This award will recognise the overall best structured product & derivatives manufacturer for structured products	√	√
Best House, Equities	This award will recognise the best equity structured product & derivatives manufacturer for structured products	√	√
Best House, Multi-Asset	This award will recognise the best hybrid and multi-asset structured product & derivatives manufacturer for structured products	√	√

# DISTRIBUTOR

## DISTRIBUTOR

### SRP Database

Winners are calculated by annual sales (50%) and performance data (50%) included in SRP's proprietary database.

### Submission of Product Data

Candidates will supply all product brochures or term sheets with full sales and performance data per product, striking or maturing between August 1st, 2017 and September 30th, 2018.

### Editorial

The Offshore Distributor award requires a 400-word submission detailing product innovation, understanding client needs and aftersales service, as well as relevant product data.

Categories	SRP Database	Submission of Product Data	Editorial
Best Distributor, South Africa	✓	✓	
Best Distributor, Mauritius	✓	✓	
Best Performance, South Africa	✓	✓	
Best Performance, Mauritius	✓	✓	
Best Offshore Distributor	✓	✓	✓

# SERVICE PROVIDERS AWARDS

## Survey of Market

All respondents will vote for one candidate in each category based on various criteria. The winners are determined by the total number of votes.

## Editorial

Each shortlisted candidate will need to submit a 400-word application to be measured against the criteria. The winner will be selected by an independent panel of judges convened and chaired by SRP.

Categories	Survey of Market	Editorial	Key Criteria
Best Index Provider	√	√	Innovation, Price competitiveness, understanding client needs
Best LISP Platform	√	√	Technology innovation, post-trade service, breath of coverage, user interface
Best Law Firm	√	√	Depth of knowledge, Market Responsiveness, Explain complex concepts
Best Proprietary Index Provider	√	√	Product Innovation, Performance, Customer Satisfaction, Price Competiveness
Best Exchange	√	√	Technology innovation, Infrastructure, Trade execution, User interface
Best Technology Platform	√	√	Pricing capacity, Risk Model Capacity, User interface, Integration

# OTHER AWARDS

## Survey of Market

All respondents will vote for one candidate in each category based on various criteria. The winners are determined by the total number of votes.

## Editorial

Each shortlisted candidate will need to submit a 400-word application to be measured against the criteria. The winner will be selected by an independent panel of judges convened and chaired by SRP.

	Survey of Market	Editorial	Key Criteria
Best Educational Initiative		√	Comprehensiveness, clarity, accessibility of educational material
Personality of the Year	√		Peer recognition, Long-term industry initiatives, Integrity
Best Financial Advisor/Wealth Management Firm	√	√	Product Innovation, Performance, Customer Satisfaction, Price Competiveness
Deal of the Year		√	Product size, Innovation, product performance, customer satisfaction
Best ETF House	√	√	Product Innovation, Price Competiveness, Customer Satisfaction

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**If you have any queries please contact:**

**Iveta Pekova**

Team Leader, Africa & APAC

Direct: +359 2 492 5240

E-mail: [Iveta@structuredretailproducts.com](mailto:Iveta@structuredretailproducts.com)

