



BATELEUR CAPITAL

Bateleur Capital is an independent owner-managed fund management business founded in 2004. Our business philosophy is that a sound investment will deliver consistent real returns, and we apply this principle to our corporate social responsibility and community outreach programmes.

We conduct these activities through the Bateleur Capital Foundation Trust which was established in 2014 to uplift previously disadvantaged individuals and communities and make a meaningful social contribution. The Foundation has a specific focus on education because we believe that education, training and development are the cornerstones on which real transformation in this country can be achieved.



Former First Lady, Michelle Obama noted



The ability to read, write, and analyse; the confidence to stand up and demand justice and equality; the qualifications and connections to get your foot in the door and take your seat at the table — all of that starts with education.”

The social investment initiatives that we participate in are assessed in terms of the sustainability of the project and the reach and potential impact we can make. Our key initiatives are the Bateleur Capital Bursary and Graduate Academy programme and our community outreach programmes.

The Bateleur Capital Bursary programme is targeted at university level students from previously disadvantaged backgrounds who are studying towards a degree in Finance. Following successful attainment of their qualifications, candidates are afforded the opportunity to join the Bateleur Capital Graduate Academy programme. To date,

our Bursary programme has supported nine students through 17 years of tertiary education, and our Graduate Academy programme has employed five candidates since 2016.

Our community outreach programmes are focused on pre-primary to matric learners. We partner with extraordinary people, schools and organisations, who are renowned for the results they achieve in the communities they serve. Current beneficiaries include: Great Commission United Academy, Lotus River Primary School, Masicorp in the Masiphumelele community, Trinity Children's Centre and the Oasis Association. The Bateleur team is actively involved in the various programmes that we support.

The past two years, through the pandemic and its aftermath, have been exceptionally difficult for most people - even more so the vulnerable and needy in our society. There are countless examples of the devastation the pandemic has had on the lives and livelihoods of so many. In the context of this dire adversity, extraordinary solutions were developed, exemplified by the Mother Soup programme, discussed on page 13, which arose out of desperate need when feeding schemes at schools were suspended abruptly and children were going hungry.

“As a business, Bateleur Capital has established a long track record of consistent real returns while protecting capital. Our allocation of funds to address social issues aligns with this practice, and we focus our initiatives on impactful investments that have a meaningful and measurable outcome for the communities we contribute to. Our overriding view is that an investment in education is an investment in the future.”

KEVIN WILLIAMS, MARK WILLIAMS AND CHARL GOUS
DIRECTORS OF BATELEUR CAPITAL (PTY) LTD



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There are so many worthy causes and remarkable organisations that have continued to strive to achieve a better life for their communities, and we applaud their efforts. Our focus in these challenging times has remained on our relationships with beneficiaries for whom we can make a real difference. Ultimately our goal is to support projects that have the ability to become self-sufficient in time.”

“We are steadfast in our belief that our most useful contribution is to the upliftment of children and young people through education. The Foundation’s view is that providing young children with an education gives them a sense of self worth and purpose and negates their need to seek acceptance in potentially harmful pursuits. It is proven that the sooner the positive intervention is made, the better the long term impact on the child.”

AMANDA VAN ZYL,
TRUSTEE, BATELEUR CAPITAL
FOUNDATION TRUST

BATELEUR CAPITAL BURSARY AND GRADUATE ACADEMY PROGRAMMES

An investment in education is a powerful enabler and a practical, constructive mechanism to make a positive impact on the challenges of unemployment and skills shortages which this country faces. In line with this ethos, we established the Bateleur Capital Bursary programme, designed to offer financial assistance and work experience to eligible candidates studying towards a degree in Finance.



ZAKHELE ZONDI

BATELEUR CAPITAL BURSARY RECIPIENT

Zakhele is a recipient of the Bursary programme, currently completing the final year of his Finance degree. He will join Bateleur's internship programme in 2023 as a junior analyst.



Bateleur has not only invested in funding my studies, but in me as a person. That is my big takeaway from this life-changing experience.

Being a recipient of the Bateleur Capital Bursary has exceeded my expectations. One has to experience it for oneself to fully understand how transformational this all-encompassing journey is. The support I received to further my studies and excel academically was complemented by the knowledge and wisdom gained from the whole team, which has had an enormous impact on my personal growth. The bursary has enabled me to shift my primary focus from how to fund my tertiary education to offering me opportunities to maximise my full potential.

I have always been an avid believer in, "What you do in class is as important as what you do outside of it," and thus the vacation work allowed me to bridge that gap between what I learn in the lecture rooms and how the industry operates. No amount of reading or YouTube videos will fully prepare you for that. You have to immerse yourself in it, and only then, will you start to see what it is all about."





CHRISTELLA MULIGANDE
GRADUATE INTERN AT
BATELEUR CAPITAL

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I joined Bateleur Capital as a recipient of the Bursary programme in 2020. This was a time of great uncertainty, fear and anxiety as the country lived through the extent of Covid-19 and its impact on our lives. To be granted the Foundation's scholarship, particularly in that year, was a huge relief for myself and my family and testament to the company's dedication to their community - despite navigating a global crisis as a business and as individuals themselves.

Bateleur's investment in my education and career enabled me to focus on my studies and gave me a renewed sense of confidence - the kind you can only get when people who analyse potential for a living, show faith in you. To this day, I believe it gave me the drive I needed to complete my Finance and Accounting degree at the University of Cape Town.

As a graduate trainee in the company almost three years later, I continue to learn something new every day. The transition from university to the work environment has been challenging, but nonetheless, an immeasurably valuable learning curve. I feel privileged to be part of a team that has pushed me out of my comfort zone, always challenging me to go harder and aim higher.”

BHEKITHEMBA MTHETHWA
CO-PORTFOLIO MANAGER

In 2015, University of Cape Town student, Bhekithemba Mthethwa, was awarded the inaugural Bateleur Capital Bursary to fund his studies in Business Science, specialising in Finance. Based on his impressive academic achievements, Bheki was subsequently invited to join Bateleur Capital on a two-year graduate internship in 2018. It is with enormous pride that we announced his promotion to Co-Portfolio Manager in early 2022. Bheki epitomises the ambitions of our Bursary programme and we applaud his success.

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Hard work pays off,” has been the mantra at Bateleur since the first day I started vacation work in 2015 as a second-year student. Fast forward to 2022, and I cherish how fortunate I am to be part of the portfolio management team in this stimulating environment. As a unit, we are highly motivated and driven to deliver on the mandates given to us by our clients. We leave no stone unturned when looking for opportunities and have created a culture of constant dialogue, rigorous debate where everyone is encouraged to challenge existing views and of course bring new ideas into the funds. All I can say is, “Watch this space,” we've got something special going here and I believe our efforts will continue to show in our performance for our clients.”



COMMUNITY OUTREACH PROGRAMMES

MASICORP AND THE MASIPHUMELELE COMMUNITY



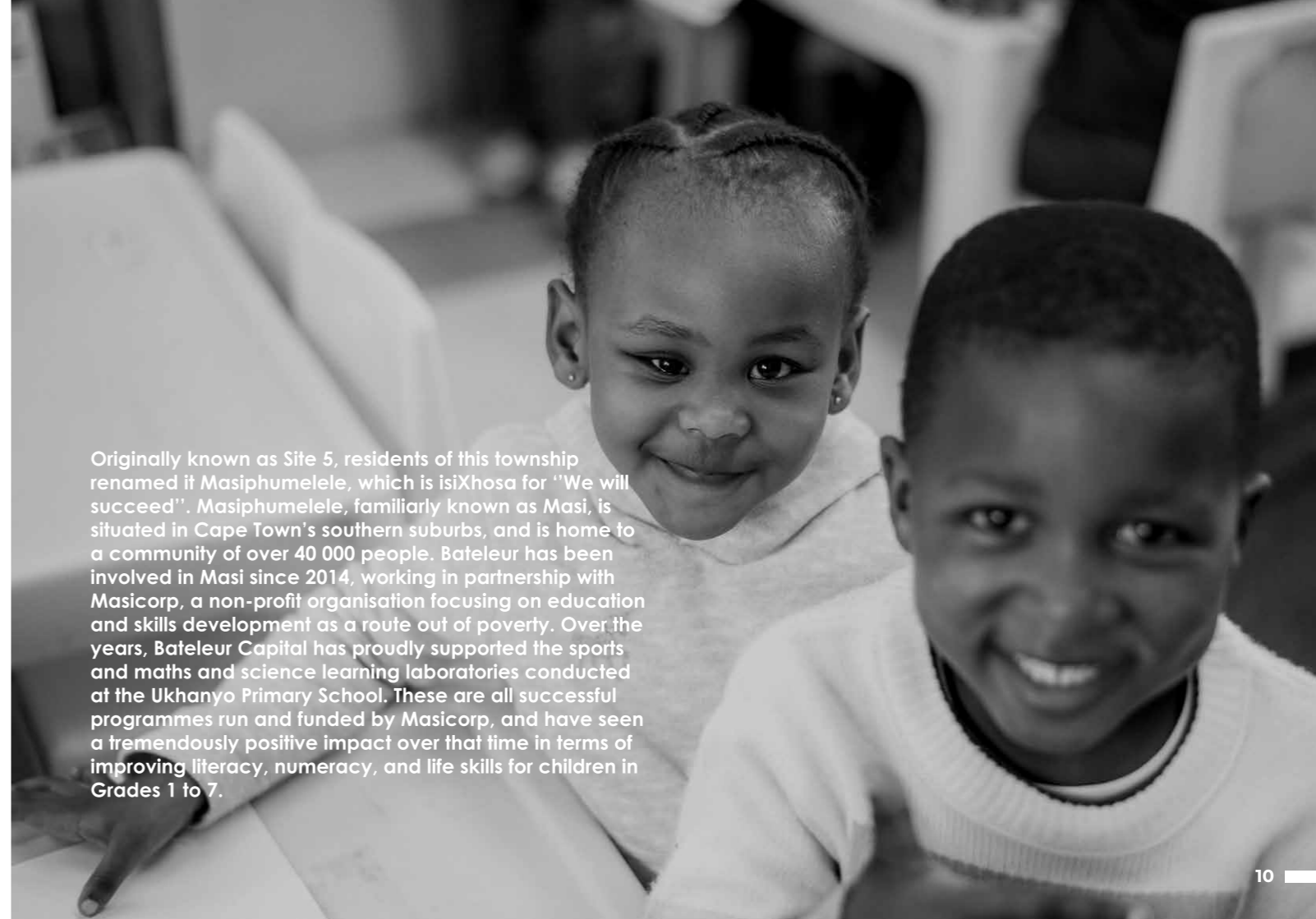
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Masicorp believes that access to a high quality early childhood education builds a strong foundation for future learning, and over the past few years, Masicorp has invested heavily in improving access to quality early childhood education in the Masiphumelele community.

Bateleur has assisted Masicorp in supporting early education development (ECD) education for the past four years by helping to fund the needs of two of Masicorp's educare centres, Chasmay Educare and Masi Educare. Today, over 300 children in Masi between the ages of 18 months to six years benefit from these pre-school services. The school feeding programme ensures that each child receives two nutritious cooked meals and two fruit snacks daily. The themes, curriculum and learning material they follow are taught by women from the Masi community who have qualified as ECD teachers through Masicorp's teacher training programme.

Bateleur Capital's commitment to nurturing the youngest members of the Masiphumelele community has helped Masicorp to improve the standard of care of pre-school children from this needy community and set them on a path of success in the future.”

MEGAN PRINGLE, FUNDRAISER



Originally known as Site 5, residents of this township renamed it Masiphumelele, which is isiXhosa for “We will succeed”. Masiphumelele, familiarly known as Masi, is situated in Cape Town's southern suburbs, and is home to a community of over 40 000 people. Bateleur has been involved in Masi since 2014, working in partnership with Masicorp, a non-profit organisation focusing on education and skills development as a route out of poverty. Over the years, Bateleur Capital has proudly supported the sports and maths and science learning laboratories conducted at the Ukhanyo Primary School. These are all successful programmes run and funded by Masicorp, and have seen a tremendously positive impact over that time in terms of improving literacy, numeracy, and life skills for children in Grades 1 to 7.

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It is very hard to describe Bateleur Capital's contribution in words but I believe this sums up what they mean to us at GCU:

To see the potential in a seed, that is genius. Over the last three years, Bateleur Capital has gone far beyond our dreams in their support for us. They have, and continue, to plant seeds of hope within our organisation as they see the potential within our organisation and our beneficiaries. What stands out for me personally is the time they take out of their busy schedules to listen to our challenges and to give us sound advice."

MARIO VAN NIEKERK, FOUNDER



GREAT COMMISSION UNITED ACADEMY (GCU)

Heideveld is an impoverished area on the Cape flats, part of the greater Cape Town, where the community faces numerous difficult issues, particularly affecting the youth. Broken homes, unemployment, drugs and gangsterism are rife, and young people urgently need avenues that provide them with alternatives and hope. In response to this need, Great Commission United Academy (GCU) was founded in 2001 by Mario van Niekerk, someone all too familiar with the challenges that face the youth of the gang-ridden Cape Flats. Mario is a former gang member who grew up in Heideveld and continues to live there to this day. Initially established as a football club, GCU has expanded its role and influence to become a broader youth academy, using sport and education to uplift the local community and reduce the impact of the gang culture.

Mario explains that the standard of education at the Heideveld schools is very poor and, other than those offered by GCU, there are no meaningful extra mural activities for the children to participate in after school or on weekends. As such, GCU conducts a range of literacy, life skills, feeding, and sports programmes in the five local Heideveld primary schools, aimed to equip children with literacy and numeracy skills and expose them to positive influences and aspirations which enrich their lives and distance them from gangs and crime.

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GCU aims to give the youth of Heideveld the opportunity to dream of a better future through providing the educational tools and life skills that will make those dreams a reality."

Among its wide range of projects, GCU promotes literacy and education advancement by providing tutors for literacy classes at Heideveld's various primary schools as well as tutoring after school; conducts after-school structured sports and organised activities' programmes; operates a small creche which focuses on ECD; fosters youth employment and empowerment through providing work experience for high school graduates as tutors or coaches and assists with career guidance and advancement; and conducts community development and feeding schemes, particularly for primary school children in the area.

At the onset of Covid-19 in 2020, with the schools closed and an increased need to feed hungry communities, GCU redirected its resources to providing food parcels and implementing more regular feeding initiatives. It was during this time of dire need and desperation that extraordinary vision and innovation led to the creation of the Mother City Kitchen Project.



GCU MOTHER CITY KITCHEN PROJECT

In June 2020, GCU partnered with Woodstock Brewery and their 'Mother Soup' project. The idea of Mother Soup was born out of the realisation by owner Andre Viljoen, that his craft brewery, the Woodstock Brewery, had some of the largest kettles in the 'Mother City' of Cape Town, which could be re-purposed from brewing beer to making soup during the time when the sale of alcohol was restricted by Covid regulations.

With the support of generous volunteers and donors, more than five million meals were prepared at an average cost of R1,25 each, equating to up to 21 000 adult soup portions (7 000 litres) per day. The soup recipes are developed by certified nutritionists and chefs, and with added protein and healthy fats, the aim is to ensure that the soup is tasty while providing the nutritional equivalent of a healthy balanced meal. Fresh bread is also provided with each meal and the meals are delivered hot to those who need it most.

Due to its ongoing success, Mother Soup eventually outgrew the brewery and GCU took over management of the project. In late 2021 factory space was acquired and developed and GCU installed its own industrial cookers. The project was renamed Mother City Kitchen and formally launched in mid-2022. The new Mother City Kitchen is situated near the Epping fruit and vegetable market, to best access low-cost and free fresh produce. The aim is to continue making nutritious soup and other meals on a daily basis, specifically targeting early childhood development facilities and schools, thereby ensuring needy children are nourished and better able to concentrate, learn and develop.

GCU recognises that there is a long-term need to supply meals to hungry Capetonians, particularly through the non-governmental and schools' network. Experience has proved that massive efficiencies can be achieved through large-scale cooking, and with an ever improving, and growing distribution network, to become a meaningful and effective large-scale provider of nutrition. GCU's vision is that the model will be replicated to establish City Kitchens throughout South Africa where the need exists.



TRINITY CHILDREN'S CENTRE (TCC)

"Bright futures begin here," is the motto of this Christian-based school in Mitchell's Plain on Cape Town's Cape Flats. This is a bold claim given that many of the local children in the area are raised in an environment of strained families, dangerous neighbourhoods, and overcrowded schools.

TCC Founder, Renier Coetzee, and his team believe that with God's help, their mission is to bring life-changing education to these children, so that they can become the heroes who overcome the adversities that threaten their communities.

TCC's remarkable journey began in 2012 with one small pre-school class in the unused garage of a local church. By 2015 when these 15 children were ready for school, TCC opened its first Grade 1 class, while continuing to take new children into the pre-school. With extraordinary fortitude, prayers and donor support, the school successfully nurtured its pioneer class to completion of Grade 7 in 2021.



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The last few years have held a mix of celebration and challenge for Trinity Children's Centre. On the one hand, our primary school finally reached Grade 7 after ten years of steadily growing, learning and expanding. In December 2021 we held our first-ever graduation and those graduates are now well on their way to completing Grade 8 in various high schools around Cape Town. However, at the same time, the pandemic brought immense educational and financial setbacks for our school. Although these setbacks were real and costly, they did give us the opportunity to see the resilience of our students and the commitment of our staff, donors and volunteers in action. Even in hard times – perhaps especially in hard times – it is important to celebrate the good. Bateleur Capital has been helping us to do that for many years by sponsoring our Christmas party at the end of each school year, so that we can send our students off on a high note after a year of hard work and learning.”

RENIER COETZEE, FOUNDER

OASIS ASSOCIATION

This organisation was established in the Western Cape in 1952 to meet the needs of children who were unable to access mainstream schooling due to their intellectual disability. As these beneficiaries matured, Oasis provided sheltered employment at two protective workshops in Goodwood and Claremont. Ten percent of this workforce now also resides at two group homes, in Kenwyn and Ruyterwacht. In addition, Oasis operates two Day Centres for 90 severely or profoundly disabled children in Ravensmead and Delft, and provides adult activities for 58 adults. Oasis's beneficiaries have access to social work and occupational therapy services, and transport is provided for them across the Cape Flats and various surrounding areas.

Today, Oasis is one of the largest and most impactful organisations of its kind, not just in the Western Cape, but nationally.



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Bateleur Capital has been a trusted partner of Oasis since 2013. This was exemplified during the Covid-19 pandemic, which had a hugely negative impact on our ability to provide our full basket of services to our beneficiaries. In order to protect our beneficiaries and staff, and in line with Covid-19 protocols, we had to suspend our recycling depot, shops and bakeries. Bateleur's continued financial support throughout this time enabled us to purchase personal protective equipment for our staff, including hand sanitisers, aprons and masks, which ensured we could continue to safely provide our much-needed services to our beneficiaries. Bateleur's funding also contributed to food parcels for staff and beneficiaries and helped us to avoid having to retrench any of our staff.

Without Bateleur Capital's continued belief in and support for Oasis, the outcomes for our organisation and our beneficiaries could have been so much more dire.”

CHRISTOPHER MINGO, FUNDRAISER



LOTUS RIVER PRIMARY SCHOOL

Lotus River Primary School, situated in Grassy Park, Western Cape, is a heritage site and was first known as the "Board School," due to the numerous farmers' children who attended and boarded at the school. Lotus River Primary, in its current day-school format, was founded 80 years ago.

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Most of our learners are barely conversant in English, which is the medium of instruction. As a result, teaching in the language is often a daunting task for our educators. In addition, many of our learners are from disadvantaged communities, and a large number of them are raised in backyard dwellings, informal settlements such as Kabaskraal, Jim se bos, Phumlani, Eagle Park, and surrounding areas such as Parkwood, Pelican Park and Lotus River. Due to the high rate of unemployment amongst our parents, some of the learners are also stressed and highly strung.

In some cases, where the parents and guardians of our learners rely on social grants and donations from community organisations such as churches and mosques, the only sustenance these children receive is that provided by our school. We firmly subscribe to the saying, "You cannot teach a hungry child," so every day our learners receive two meals at school. On occasion, we are able to provide them with bread to take home to feed the rest of their family members.

Bateleur has partnered with our school since 2018, and the relationship has had a very positive impact on our learners. As a school we thrive on getting the learners involved in extra-mural activities; we believe that these activities give the children a sense of sportsmanship and have a positive impact on reducing bullying. Thanks to Bateleur Capital's donations of bats and balls of all types, our learners are equipped for these activities, as well as for our physical education classes and informal games during break times. We are also very grateful to Bateleur Capital for assisting with upgrading our computer lab. Their technician has assessed and revived our malfunctioning computers and enabled our learners to confidently use the computer programmes. We are certain this intervention will be evident in their scholastic results at the end of the year. Bateleur has also offered to assist our school with installing new air conditioners in the lab, which will create a healthy environment for the learners to further their computer technology studies in comfort."

TANIA ABRAHAMS, PRINCIPAL

CAMP SONSHINE AND TODS EDUCARE

In the disadvantaged Maitland Garden Village community, situated on the outskirts of Cape Town's city centre, we continued to fund the school fees and related education costs for two learners at Pinelands North Primary School through the Camp Sunshine initiative, which provides tuition and a range of after-care enrichment programmes for local children. We also continue to host the annual Christmas party for Tods Educare, a pre-primary school in the Village.



AD HOC CONTRIBUTIONS

The Covid-19 pandemic had a devastating impact on the lives and livelihoods of almost every community in the country. During this time, in addition to supporting our existing beneficiaries, we made our largest single contribution to date - to the Solidarity Fund, a platform created to mobilise South Africans from every sector and unite the nation in its response to the crisis, and to the resulting health, humanitarian and social consequences.

We also made ad hoc donations to St Luke's Hospice, which provides palliative care to people with life-limiting illnesses, Home from Home, an organisation that offers supportive, family-style foster care to orphaned, abused, neglected and vulnerable children, and The Healing Heart Foundation, which focuses on strengthening emotional resilience to restore, transform and inspire people through the two key areas of well-being and education.

We review our contributions annually and will continue to invest in causes where we believe we can uplift and improve the lives of the recipients.





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