momentum

Our Managed & Income Portfolios
Risk-rated, outcomes-based investments

AdviserSolutions
Decisive Investing

Momentum is a global investment manager focused on designing, building and managing investment solutions, delivered through multi-asset funds and model portfolios on platforms. Established in 1998, Momentum is part of MMI Holdings, a large South African insurance and investment business, listed on the Johannesburg Stock Exchange.

Our purpose is to enhance the Financial Wellness of individuals, their communities and their businesses and we are committed to providing investment solutions that can deliver against real client investment objectives.

The service we provide

Our service provides access to our discretionary investment strategies. Our solutions are structured to provide a sophisticated investment offering that aims to help portfolios perform strongly in an array of market conditions and is very competitively priced.

Our Managed and Income Portfolio range

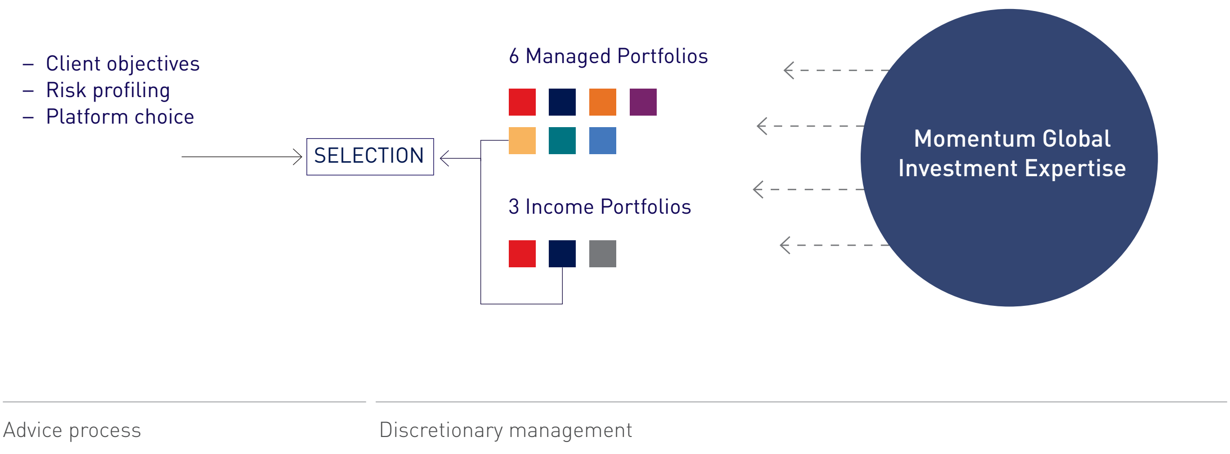
Our investment range consists of six Managed Portfolios and three Income Portfolios designed to cater for a wide range of risk and return appetites. All the Portfolios utilise our investment desk's macroeconomic views, asset allocation framework and contain investment instruments carefully selected by the team from some of the leading financial institutions around the world.

The Portfolios are highly diversified and spread risk by investing across regions and asset classes, adhering to the firm's outcomes based and capital preservation philosophy. As part of this philosophy, our investment desk will act decisively to safeguard returns in periods of market volatility. Our Portfolios are one of the few outsourced investment solutions that can be converted to cash* in extreme periods of market volatility. The Portfolios are also rebalanced on a regular basis to ensure that the asset allocations adhere to the original risk profiles.

Our Portfolios enable clients to draw on our sophisticated proprietorial investment process and utilise three decades of Momentum's investment management expertise.

An income solution

Our Income Portfolios are designed to meet various income requirements. Each Portfolio is carefully constructed with the objective to provide a sustainable income within a tight risk control framework. The three Portfolios provide an emphasis on preserving capital whilst providing a conservative, balanced and higher risk / return income solution.



Cost efficiency

Our charge for discretionary management of the Portfolios is very competitive, at 0.25% + VAT.

Independent risk profiling

We use various risk mapping tools to show the different levels of risk within our Portfolios. All our Portfolios are aligned to a different level of risk and are mapped to Distribution Technology, one of the UK's leading independent risk profiling services, making selection a clear and transparent process.

Accessibility

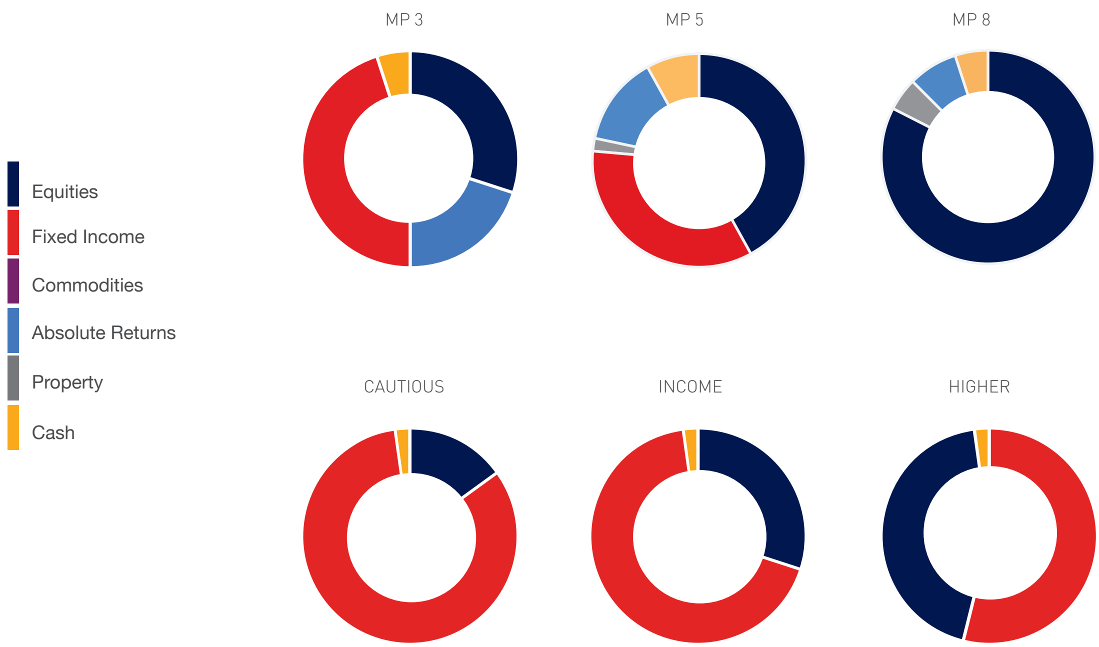
Our Portfolios can only be accessed through a financial adviser and are held on a number of retail investment platforms.

Risk mapping our portfolios

MANAGED PORTFOLIOS	DISTRIBUTION TECHNOLOGY RATING
Managed Portfolio 3	3
Managed Portfolio 4	4
Managed Portfolio 5	5
Managed Portfolio 6	6
Managed Portfolio 7	7
Managed Portfolio 8	8

INCOME PORTFOLIOS	DISTRIBUTION TECHNOLOGY RATING
Cautious Income	3
Income Portfolio	4
Higher Income	5

Asset Classes | Managed & Income Portfolio range



To find out more about the
Managed & Income Portfolios
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