

Press Release

Momentum Global Investment Management launches the Momentum Real Assets Growth and Income fund (RAGI).

Momentum Global Investment Management (MGIM) today announces the external launch of Momentum Real Assets Growth and Income fund (RAGI)*. The fund will give advisers access to a diverse range of well-researched and actively optimised real asset and alternatives within a single fund.

RAGI seeks to deliver returns that are not correlated to traditional markets, offering inflation linked income and growing asset values for investors. The strategy will be diversified across four sub-asset classes of investment trusts (Property, Infrastructure, Specialist Financial, Private Equity), in addition to allocation to non-correlated assets and liquidity assets (Gold, gilts, cash).

The specialist team responsible for the management of the fund, led by Richard Parfect and Gary Moglione is well established, having held responsibility for the specialist asset and alternatives component of the company's long standing diversified fund range.

The fund will be available on adviser platforms with an OCF of 0.81 and included as part of the asset allocation approach within MGIM's Managed Portfolio range.

Richard Parfect, co-manager of RAGI, said: *"We have been investing in real and alternative asset strategies for over two decades and have significant expertise and longevity of experience within the team to provide advisers and wealth managers access to a best-in-class solution based on the asset blend distinction versus peers"*.

Andrew Hardy, Director of Investment Management, commented *"For some time clients have requested a focussed solution in these asset classes and this growing interest has led to the launch of RAGI. In doing so we are providing advisers and their clients with access to top-quality investment opportunities and supporting them in their investment approach."*

**The fund has been running with internal investment from April 2024.*

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