

# About

## The Managed Portfolios

**momentum**

The Momentum Managed Portfolios were designed to give investors access to discretionary investment strategies. Our solutions are structured to provide a sophisticated investment offering that aims to perform strongly in an array of market conditions. Our Managed range consists of six Managed Portfolios and one Income Portfolio designed to cater for a wide range of risk and return appetites.

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### Key Features



The Managed Portfolios offers a range of risk-rated Portfolio targeting inflation plus returns over four or more years.



The Portfolios are broadly diversified investing in a wide range of **global asset classes** such as equities, fixed income, cash, property and alternative strategies.



The Portfolios strategic asset allocation is designed with the aim of achieving the stated target return while staying within their nominated risk bands. The Portfolios tactical asset allocation is actively managed and reflects Momentum's views on asset classes, regions and currency. These can be implemented using either active or passive strategies.



Our team of investment specialists with **over 194 years' combined experience** work collaboratively to identify and implement innovative investment ideas based on our wealth of experience to achieve these goals.



The Managed Portfolios are available on **10 platforms**.



Dedicated distribution services team, available on +44 (0)20 7489 7223 or email [distributionservices@momentum.co.uk](mailto:distributionservices@momentum.co.uk)

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Our Outcome based Investment philosophy is built on three core capabilities:

- » **Asset allocation** - disciplined, robust and valuation driven, we build portfolios with true diversification across a wide range of non-correlated assets.
- » **Investment selection** - Our strategy selection process focuses on identifying the optimal way to construct each portfolio. We recognise that no investment house has a monopoly of skills in all disciplines: having an unconstrained choice allows us to choose the most appropriate investment strategy for any particular asset class.
- » **Portfolio construction** - We are objective and independent in our approach, with no incentive to utilise a specific provider in the underlying composition and construction of the portfolios.

# About Momentum

**m**omentum

Momentum Global Investment Management was established in the UK in 1998 as an investment business focused on designing, building and managing innovative investment solutions. The firm is a wholly owned subsidiary of Momentum Metropolitan Holdings Limited, a large South African insurance and investment business, listed on the Johannesburg Stock Exchange. We work closely with our institutional and adviser partners in the UK, Europe, Asia, Middle East, Latin America and South Africa in order to build and manage solutions that meet the needs of our investors.

We are deliberately different. We have developed a unique investment philosophy that prioritises the prospect of our clients achieving their unique investment goals. We call this investment approach Momentum Outcome-based Investing. Our team of investment specialists work collaboratively as a team to identify and implement innovative investment ideas based on our wealth of experience to achieve these goals.



Momentum Global Investment Management was established in the UK in 1998.



Momentum Global Investment Management is authorised and regulated in the UK by the **Financial Conduct Authority (FCA)**.



Momentum Global Investment Management currently has **\$5.2bn\*** asset under management.



Part of Momentum Metropolitan Holdings Limited, one of the largest Insurance and asset management companies in Africa, with **\$40bn\*** assets under management.



Momentum Metropolitan Holdings Limited is listed on the Johannesburg Stock Exchange with a market cap of approx **\$2bn**



Momentum Metropolitan Holdings Limited has offices in over **18 countries** worldwide.



Momentum Metropolitan Holdings Limited employs over **16,000 staff** worldwide.

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\*as at Sept 2019. Past performance is not indicative of future returns.

For professional advisers only.