ABOUT
The Focus Funds

momentum
global investment management

The Focus Series is a range of outcomes-based funds designed to provide a balance of risk and reward to meet your clients' varying objectives. The Funds are designed for investors who seek an investment solution with a clear objective and without undue risk.

Key Features

The Focus Series has been designed to offer a range of risk-rated funds targeting inflation plus returns over four or more years.

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

The funds' strategic asset allocation is designed with the aim of achieving the stated target return while staying within their nominated risk bands. The funds' 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 Focus fund range currently has close to £53m* of assets under management.

The Focus Funds are available on **22 platforms.**

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

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.

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

ABOUT
Momentum

momentum
global investment management

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 **$5.6bn* 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.**

JSE
listed

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.**

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

For professional advisers only.