

The Momentum Sustainable Managed Portfolios offers a suite of diversified multi-asset portfolios with a dual mandate that caters for a range of risk and return objectives, whilst improving the sustainable investment footprint.

Key features



Momentum's investment specialists work collaboratively to identify and implement ideas based on a wealth of experience



A true multi-asset offering aiming to deliver real returns via access to a broad and diversified investment universe

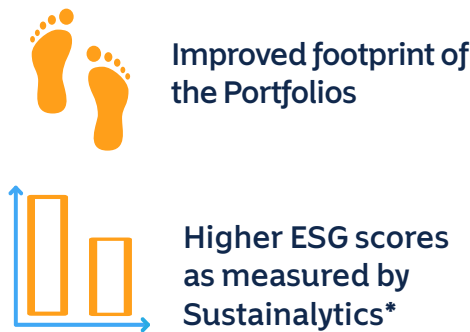


Selecting funds that we anticipate will improve the Portfolios' sustainability footprint compared to an 'ESG unaware' strategy

Sustainability inside

We screen from the ever-growing universe of funds that cater to the sustainable investment client segment. We may also include funds with less explicit 'green' labelling, whose management teams we consider as leaders in the integration of Environmental, Social and Governance (ESG) risk factors into their investment processes.

Not all funds are born alike: we select those funds that we anticipate will improve the Portfolios' sustainability footprint compared to an 'ESG unaware' strategy.



*Sustainalytics is a leading provider of ESG research, ratings and data to institutional investors and companies.

Seek to reduce exposure to businesses deriving significant revenue from controversial areas. Revenue threshold for exclusion varies per third-party fund:



Controversial Weapons



Tobacco



Palm Oil



Gambling



Heavy Extraction

Momentum Sustainable Managed Portfolios

The Sustainable Managed Portfolios range of risk profiled core multi-asset investment portfolios that invest in an underlying suite of open-ended investment funds, most of which have specific sustainability criteria embedded into their objectives.

The Sustainable MPS investment process builds off Momentum's pedigree and long-standing success in multi-asset investing. Our robust and repeatable process centres around an asset allocation valuation framework that is embedded into all our investment solutions.



Allocations subject to change. *The Current Yield is the weighted average yield of the underlying holdings over the past twelve months. This does not include underlying fund charges. The Momentum Managed Portfolios risk rating assigned by Defaqto. Past performance is not indicative of future returns.

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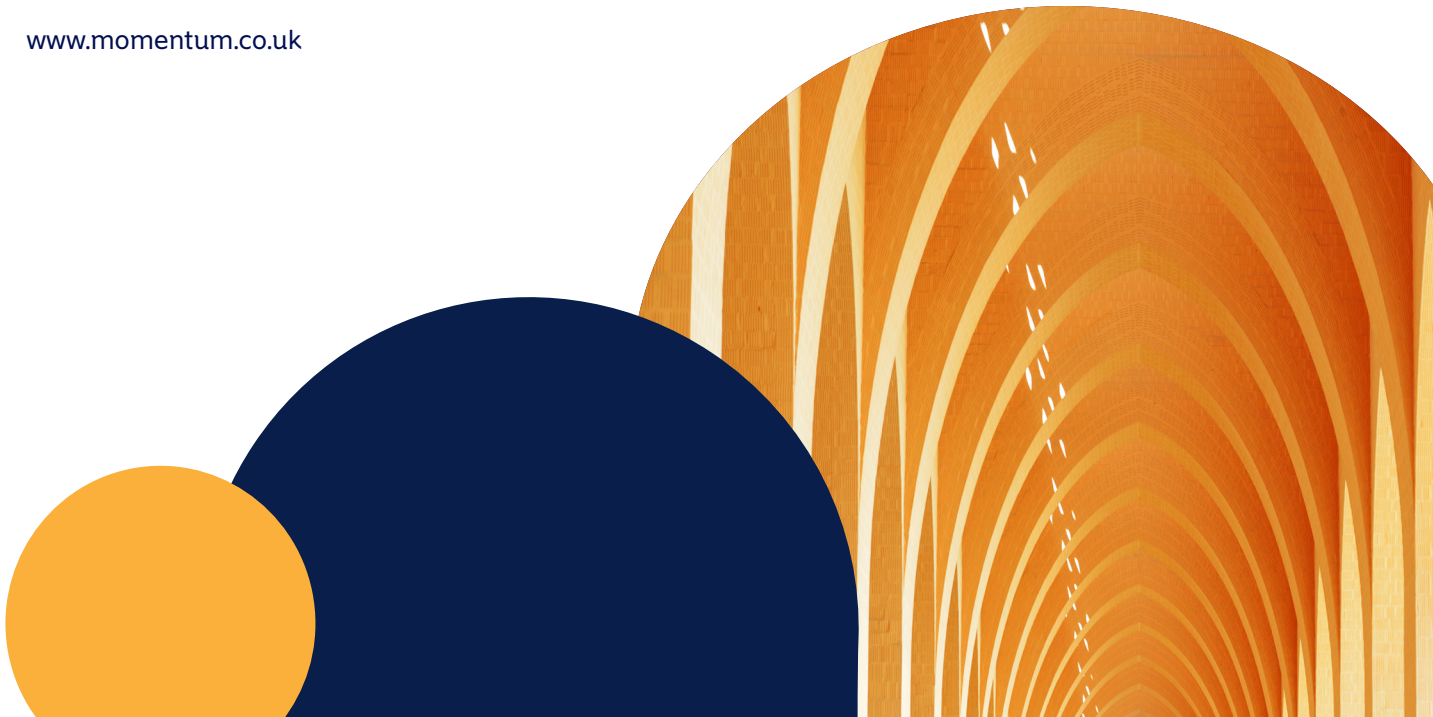
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