



momentum
global investment management

Momentum
**Sustainable Managed
Portfolio Solutions**

Aimed at professional advisers.

With us, investing is personal

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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

Outcome-based investing

Managed Portfolios as an outsourced approach could assist your investment processes to deliver outcomes and investor value by:



Aligning with client outcomes

Momentum's outcome-based investment philosophy guides our approach in determining the optimal strategic asset allocation for a particular investment objective. Each Portfolio has been specifically designed to focus on achieving set outcomes and smoothing the journey towards them.



Client communications and reporting

We are able to work with you to create communications and reporting; providing insight into investment decisions and portfolio changes and providing regular reporting for your client engagement.



Efficiency and robustness

We have an experienced and well-resourced team of investment professionals including specialists in fund research, risk management, portfolio construction and trade implementation. Outsourcing these functions to Momentum enhances efficiency within your business.



Thinking commercially and delivering value

Delivering value for clients isn't just about price; it incorporates service, experience, and ultimately client satisfaction. All of which can be difficult to achieve without scale. Partnering with Momentum could provide broader resources, supporting you and your clients.

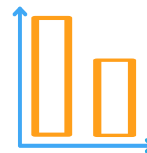
Sustainability inside

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.




Improved footprint of the Portfolios




Higher ESG scores as measured by Sustainalytics*

*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



Gambling



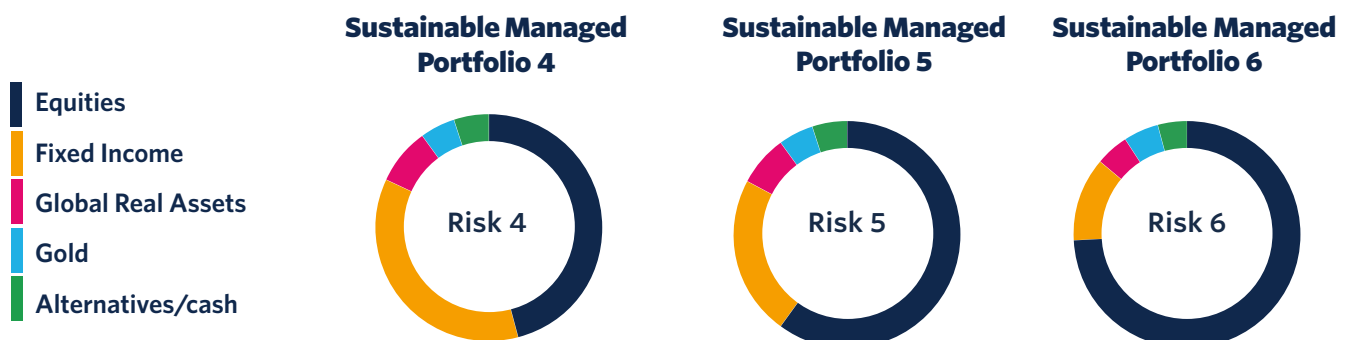
Heavy Extraction



Palm Oil

The Sustainable MPS is a 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 Momentum Sustainable Managed Portfolios are not formally rated but are managed aligned to in-house targets and proprietary risk methodology. Source: Momentum Global Investment Management. Past performance is not indicative of future returns.

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The Momentum Sustainable Managed Portfolios (sMPS) are applied to client accounts by the platform provider and it may take some time for the client accounts to mirror the performance of the sMPS. It is for this reason that client accounts may not achieve exactly the same returns as the sMPS. The performance of the sMPS is based on the actual performance of the underlying funds included in the portfolios.

The value of investments, and the income derived, may fluctuate and as a result there is no guarantee that the investment objectives of the sMPS will be achieved and it is possible that an investor may incur losses, including a loss of the principal invested. MGIM (Company Registration No. 3733094) has its registered office at The Rex Building, 62 Queen Street, London EC4R 1EB. MGIM is authorised and regulated by the Financial Conduct Authority in the United Kingdom (registration no.232357). ©MGIM 2024

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