

Momentum Global Investment Management (Momentum) has been quietly growing its UK investment presence in the last few years and most recently acquired Seneca Investment Managers further growing its AUM to over £4.5bn at the beginning of 2021.

A key area of focus for the year ahead is growing our reach in the adviser market. Stephen Hunter, Head of Business Development said:

*"An area we intend to expand on is in the Model Portfolio market which has grown significantly in recent years and yet there are a significant number of vanilla providers all doing much the same thing."*

Here is where having a heritage in Multi-Asset, a well-resourced investment team and a differentiated investment style brings Momentum's portfolios into their own.

The difference is evident in the approach to two key areas:

## **Outcome Based Investing**

Most model portfolios have investor objectives, but few have as strong a process as Momentum in striving to enhance the probability of delivering on those objectives through a combination of strategic and tactical asset allocation, risk management and manager selection with a balanced blend of investment styles through time.

## **Blending investment styles as well as asset classes for true diversification**

2020 capped off a decade of growth outperformance for global equities, but we also saw the attributes of quality shine through earlier in the year, and witnessed a big rotation into value as year-end approached. Momentum use their resources and expertise in manager selection to blend these differing styles together using some of the best global managers across the style spectrum and adjusting the allocation as the market backdrop evolves.

The future will always be uncertain but a focus on outcomes and enhancing the probability of delivering on them over the investment time horizon is key.

Achieving this through a diverse selection of underlying investment strategies and investment styles offers a strong long-term solution and differentiates Momentum in the all too similar model portfolio market

Read more on our approach at [momentum.co.uk](https://momentum.co.uk) or contact us at [distributionservices@momentum.co.uk](mailto:distributionservices@momentum.co.uk) to arrange a discussion.

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