

The Momentum Managed Portfolios are designed to give investors of all risk profiles access to discretionary investment strategies through model portfolios suitable to them and their investment goals. Our solutions are structured to provide a sophisticated investment offering that aims to perform strongly in an array of market conditions.

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



All Portfolios are independently risk-rated by leading rating agencies and are easily accessible on ten platforms

Outcome-based investing

The 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.

Momentum Managed Portfolios

The Momentum Managed Portfolio Service consists of six Managed Portfolios and an Income Portfolio designed to cater for a wide range of risk, return and appetites. The Portfolios are highly diversified and spread risk by investing across regions and asset classes. As well as a wide diversification of assets, we also use a blend of investment styles and approaches that we feel support and are complementary to our outcome-based investment approach.

Our core strength is a detailed, in-depth understanding of multiple asset classes. For each asset class we undertake extensive modelling using proprietary techniques to assess likely returns under different scenarios. This allows us to build robust portfolios that are likely to perform across different economic climates.

The Managed Portfolios asset allocation is actively managed and reflects our views on asset classes, regions and currency.



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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