

Momentum Investments

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THINK-TANK

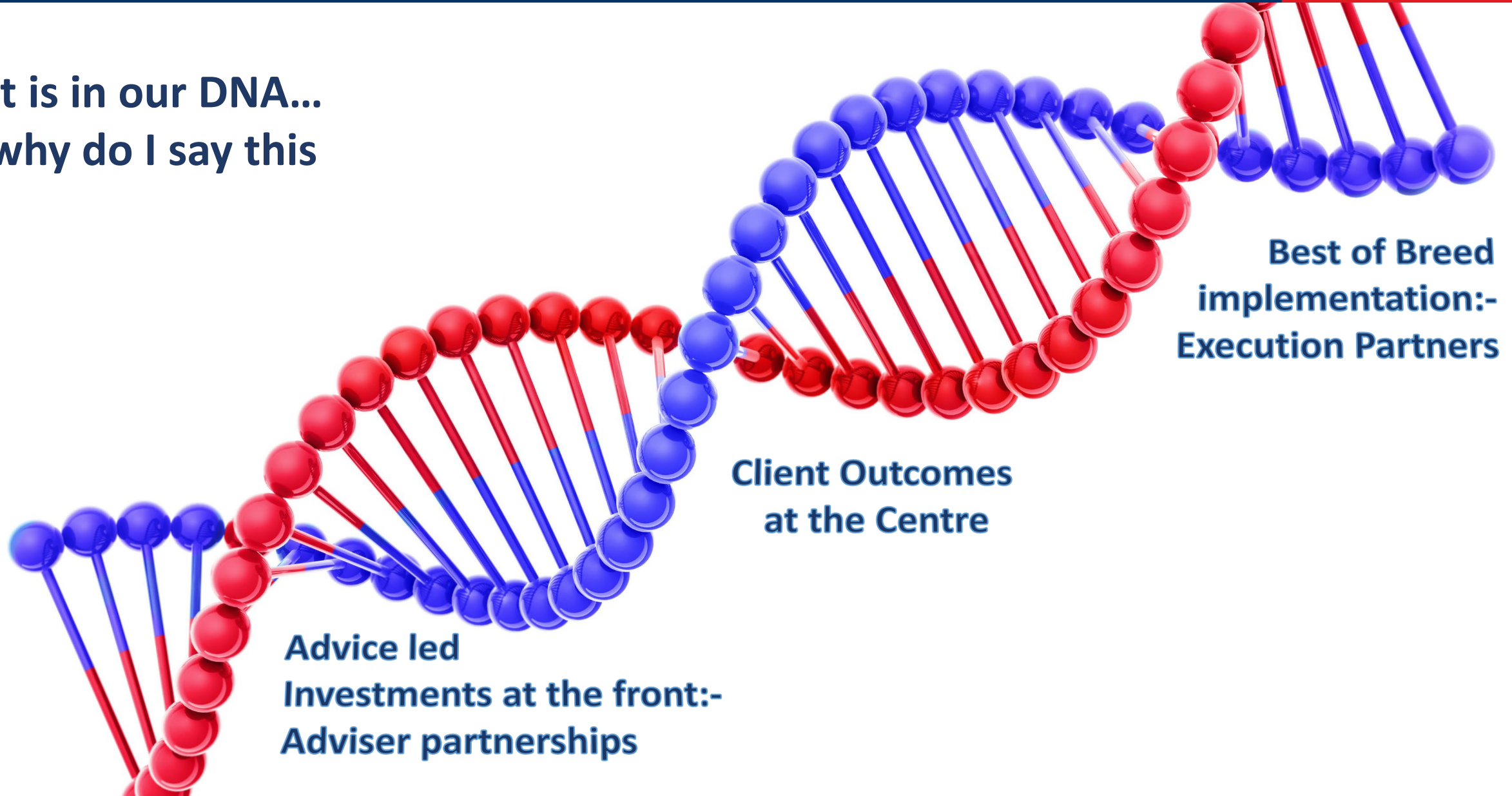
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For us, investing is personal



It is in our DNA...
why do I say this

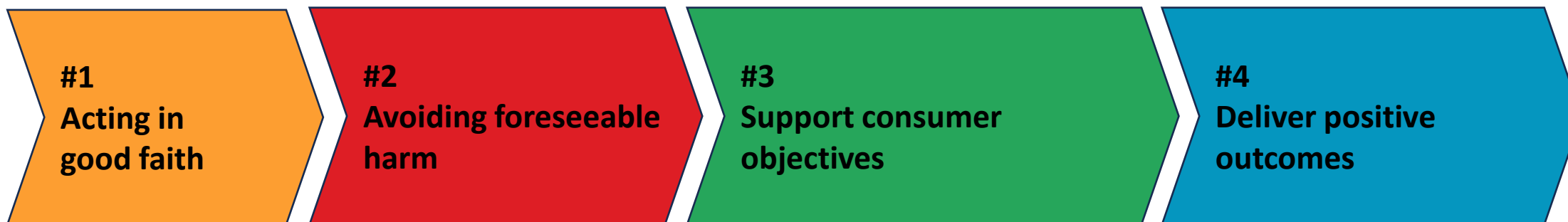


**Best of Breed
implementation:-
Execution Partners**

**Client Outcomes
at the Centre**

**Advice led
Investments at the front:-
Adviser partnerships**

Client outcomes, it's personal



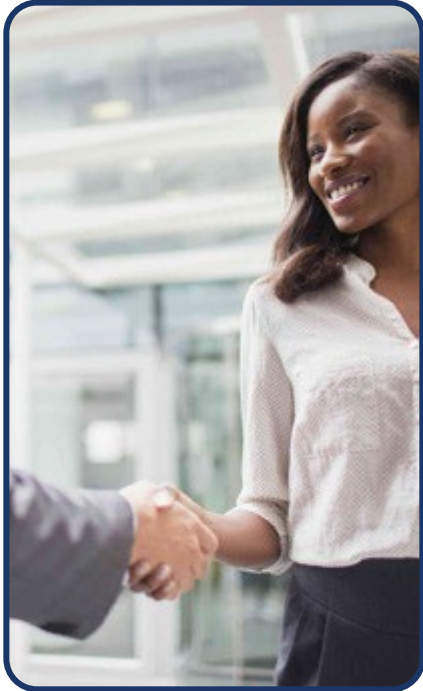
Client Outcomes at the Centre
UK's Consumer Duty



Adviser partnerships, it's personal



Adviser partners support and focus



Focused on enabling our adviser partners to deliver great client outcomes and experiences



Developing and managing investment solutions and processes to support advice outcomes



Strong investment IP delivering thought leadership, research and market insights, to our adviser partners



Enabling advice practice sustainability through CPD accredited events and webinars

Investment partnerships, it's personal



Asset management and Service delivery



**Small where
optimal -
Boutiques**



**Big where
appropriate - Global
partnerships**



**Best in class
research and data**



**AI and new
technologies**

Navigating the world around us...



...as partners, through a volatile world = helping clients along their journey



Sustainability



ESG
(Environmental,
Social, and
Governance)



**Renewable
Energy**



Biotech



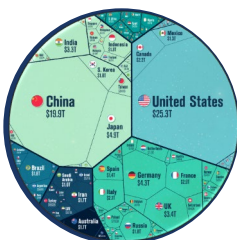
Blockchain
(Tokenised
funds)



AI
(Artificial
Intelligence)



Geopolitics
(an unequal
world at war)



**Low growth
markets**



**Inflation &
cost of living**



**Remote Work &
skills access**



Digital Economy



Cybersecurity



Our wealth of investment capabilities



Multi-managed, multi-asset solutions

**Multi Asset
& Multi-
Managed
Funds**

**(DFM)
Model
Portfolio
solutions**

Direct asset management

**Independent
boutiques
(affiliates)**

**(Specialist)
Single
Manager
Fund Range**

**Internal
direct
capabilities**

Institutional platform driving value chain integration

Outcomes-based investment philosophy & process

Collaborate on research and partnerships

Centralised investment provider to advice networks

**Independent, owner
managed businesses**

Shareholder support

**Complimentary to
in-house capabilities**

**Range of single
managed funds**

**Each managed by a
specialist manager**

**Independently
branded**

**Systematic
strategies**

Alternatives

Fixed income

Listed property

Our Momentum Metropolitan Group



Our Group has financial strength

Capital adequacy

Entity	Type	National scale	Global scale	Outlook
Momentum Metropolitan Life Limited	Insurer Financial Strength	Aaa.Za (AAA)	Ba1 (BB+)	Stable

Solvency capital ratio

Momentum Metropolitan Life Regulatory capital position	30 June 2022	30 June 2023
SCR coverage, pre-foreseeable dividend (times)	2.03x	2.07x

Net earnings

Group NHE	R4.4bn (\$286m)	R5.1bn (\$286m)
Momentum Investments NHE	R938m (\$61m)	R904m (\$51m)
Market capitalisation	R22bn (\$1.3bn)	R26bn (\$1.4bn)

AUM
R583 bn (\$31bn)

AUA
R237bn (\$13bn)

Thank you

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