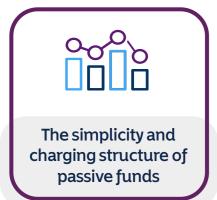
The Momentum Passive Plus Portfolio range is structured to combine the simplicity and charging structure of passive funds with the intelligence of active asset allocation. The Portfolios are comprised of 'best of breed' passive funds with some active elements where the investment managers feel they add significant advantage. Aiming to align with investors' risk preferences, as measured by volatility, returns are optimised based on each portfolio's appropriate risk level.







The rigor and intelligence of active asset allocation

### **Outcome-based investing**

Passive Plus 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 Passive Plus Portfolios**

The Momentum Passive Plus Portfolios consists of three Portfolios designed to cater for a wide range of risk and return 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.

Momentum Passive Plus Moderate Portfolio

Risk 5



global investment management

## **Contact us**





+44(0)7470 478 974



# Momentum Passive Plus Dynamic Portfolio

**Momentum Passive Plus** 

**Cautious Portfolio** 



Equities
Fixed Income
Global Real Assets
Gold

Alternatives/cash

Allocations subject to change. The Momentum Passive Plus Portfolios are not formally rated but are managed aligned to in-house targets and proprietary risk methodology. Source: Momentum Global Investment Management.



#### For more information, please contact Distribution Services



**IMPORTANT NOTES** - This document is for information purposes only and does not constitute an offer or invitation to anyone to invest in any Momentum Global Investment Management Limited ('MGIM') funds and has not been prepared in connection with any such offer. This is a marketing communication.

MGIM periodically restructures and rebalances the constituent investments to consider changing economic, market and other conditions, and these portfolio changes will sometimes cause the underlying client accounts held by the relevant platform provider to reflect a time-delay before aligning with the investment performance of the portfolio itself. The Investment performance of these portfolios is not externally audited, and reflects the actual performance of the underlying investment constituents.

This communication may only be used by a person in a jurisdiction where it is legally permitted to do so. The original recipient is responsible to ensure that no breach of local laws occurs in sharing its contents. This document should not be reproduced or distributed except via original recipients such as authorised financial advisers that are permitted to do so by local regulation and should not be made available to retail investors. This communication is not for distribution in the United States of America.

Any opinions expressed herein are those at the date of issue and cannot be depended on to predict future events. They do not necessarily reflect the views of any company in Momentum Group Limited or any part thereof. All data is sourced to MGIM unless otherwise stated. We believe that the information contained is from reliable sources, but do not guarantee the relevance, accuracy, validity or completeness thereof. Subject to UK law, MGIM does not accept liability for irrelevant, inaccurate, invalid or incomplete information contained, or for the correctness of any opinions expressed.

Past performance is not indicative of future performance. Investors whose reference currency differs from that in which the underlying assets are invested may be subject to exchange rate movements that alter the value of the investments. The value of investments and any income from them may fluctuate and investors may incur losses. All investments involve risks including the risk of possible loss of principal. Liquidity risk may delay or prevent account withdrawals or redemptions. High volatility of fund prices can result from unstable market conditions.

The investment opportunities described herein do not take into account the specific investment objectives, financial situation, knowledge, experience or specific needs of any particular person and are not guaranteed.

We are unable to give financial advice. If you are unsure about the content contained within/suitability of the funds mentioned, please speak to a financial adviser.

This document is produced and issued by MGIM (company registration no. 3733094) with 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 UK (firm reference no. 232357).