

**momentum**

global investment management

Momentum  
**Passive Plus  
Portfolio Solutions**

Aimed at professional advisers

*With us, investing is personal*

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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 simplicity and charging structure of passive funds



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.

## The Momentum Passive Plus Portfolio Service

The Momentum Passive Plus Portfolio Service 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 Cautious Portfolio**



**Momentum Passive Plus Moderate Portfolio**



**Momentum Passive Plus Dynamic 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.

## Contact us



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The Momentum Passive Plus Managed Portfolios ("Portfolios") 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 Portfolios. It is for this reason that client accounts may not achieve exactly the same returns as the Portfolios. The performance of the Portfolios 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 Portfolios will be achieved and it is possible that an investor may incur losses, including a loss of the principal invested.

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