

Two global equity solutions for your offshore investment toolkit

There is significant interest in investing offshore, whether to address a specific investment need, hedge currency risk associated with the rand or to provide exposure to bigger, deeper capital markets and unique industries and companies. That is why we, at Momentum Global Investment Management (MGIM), are excited about our two flagship global equity funds that have recently been brought to South African shores to enhance investors' offshore investment toolkits.

Having been established in 1998 as the international investment arm of Momentum Investments, we at MGIM combine the benefits of our proudly South African heritage with the global lenses and access offered by being based in the United Kingdom. Through our partnerships with advisors across the world, we can confidently say that our investment research, solutions and client base are truly global, giving us unique insights into international investment trends and developments and the needs of financial advisors and their clients. This is how we make investing personal. Importantly, we are continually focused on supporting and enabling advisors to optimise the diversification within their clients' investment portfolios, and this couldn't be truer for our South African advisor partners.

Given the increasing need for global equity and sustainably orientated solutions, our Momentum Global Fund (GF) Global Equity Fund and Momentum GF Global Sustainability Equity Fund are perfectly suited to provide South African investors with access to a wide range of ideas and investment opportunities available globally. These highly liquid, cost-efficient funds provide access to a diversified basket of developed market equities while remaining relevant and future-fit in an ever-changing investment landscape. And although the funds have only recently been made available in South Africa, both strategies have long established track records not only in terms of their returns, but also in terms of the consistency in the MGIM investment team managing these strategies according to our investing philosophy and implementation process.

The Momentum GF Global Equity Fund blends quality, growth and value investment styles to smooth the investment journey over time. Its broad developed market exposure means it is perfectly suited as a core global equity holding for investors wanting to generate long-term capital growth. Importantly, the underlying equity exposure has been accessed through both specialist global active and quantitative fund managers that have all been chosen for their specific investment style focus and areas of speciality and competitiveness.

In contrast, the Momentum GF Global Sustainable Equity Fund is invested solely using an enhanced index, data-driven approach and is implemented in partnership with Robeco, a world-class quantitative specialist based in Rotterdam. The fund is priced attractively like passive funds, but additionally integrates style premia and environmental, social and governance (ESG) factors to enhance its return potential over time. Clients, therefore, will benefit from a fund that offers a better sustainability profile, a lower environmental footprint and a higher chance of outperforming the benchmark over the long run via its exposure to the value, momentum, quality and size premia.

These two global equity funds deliver in terms of cost, style diversification, the use of global investment managers that many investors may otherwise not have access to in South Africa, an increased focus on sustainability, and the adoption of data-driven quantitative capabilities.

They say that some things in life are worth waiting for. With these two well-established global equity solutions now available within South African advisors' and clients' global investment toolkits, we couldn't agree more. For Momentum Investments, investing is personal, and we look forward to walking with you and your clients on their international investment journey. ■



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