momentum investments

Global investments

Investment management capabilities

Global investments are invested across asset classes and countries around the world. They can be focused on a single asset class or allocated to multiple asset classes. Holdings may include positions in various equity, fixed income, currency, commodities and futures markets.

Our global investments have proven track records, as they are used as building blocks within our Factor Series Ranges of Portfolios. Over time we evolved our outcome-based investing philosophy and our global multi-strategy and multi-mandate investments to match your investment needs. We set our sights beyond mere benchmarks and instead focused on the things that matter the most to you – ensuring we maximise the likelihood of you achieving your investment goals.

When selecting our global mandates, we collaborate with Momentum Global Investment Management (MGIM), which was established in the UK in 1998, as a specialist global investment manager. For more on MGIM, click here.

Portfolio outcomes
Global diversification
Capital preservation
Capital growth

Investment horizon
3 to 7 years

Risk
Medium to extra high

Rules and regulations

Our portfolios are managed in accordance with acts and regulations controlled by the Financial Sector Conduct Authority (FSCA) and other regulators as appropriate.

The role of global investments in a client's investment portfolio

Our global investments are suitable if you are looking for an offshore investment solution that has a clear outcome. The underlying investments within each investment are spread across the world and allocated to multiple mandates and strategies, leading to a high level of diversification, which means each portfolio can either be owned on its own or alongside other investments within a client's investment strategy. The portfolios target specific outcomes and are designed to suit different risk and return profiles.

Investment horizons for the different global portfolios

Enhanced Global Equity: Five to seven years

Enhanced Global Bond: Three to five years

Classic Global Equity: Five to seven years

Classic Global Bond: Three to five years

Target Global Equity: Five to seven years

Target Global Bond: Three to five years

Flexible Global Active Balanced: Five to seven years

Flexible Global Passive Equity: Five to seven years

Flexible Global Passive Bond: Three to five years

Global Money Market: Seven years

Understanding the risk profile

Our global portfolios are targeted at different levels of risk to suit different risk profiles. The risk tolerance range is from medium to extra high.

Our investment philosophy and process

We follow an outcome-based investment philosophy. We design portfolios with the aim of maximising the probability of delivering on these outcomes. We invest around the world and in a wide range of asset classes and currencies in order to achieve each portfolios investment outcome while reducing unnecessary risk.

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.

We believe in the value of optimally blending different asset classes, different investment strategies and different mandates in order to provide robust solutions.

When managing our portfolios, we never lose sight of the outcomes that clients require. Our unique outcomes-based investment approach is designed to speak to these requirements and we build our portfolios with this at the forefront of our minds to give us the best probability of achieving the specified outcomes over reasonable time periods.

Our success is measured with the frequency with which we deliver on our targeted investment outcomes.

Portfolio benchmarks

Our global equity investments are benchmarked against the MSCI All Countries World Index.

Our global bond investments are benchmarked against the Citigroup World Government Bond Index.

Our global money market investment has a composite benchmark as follows:

Local cash	85%	Short-term Fixed Interest Composite Index
Dollar cash	7.5%	Three-month US London Interbank Offered Rate (Libor)
Euro cash	7.5%	Three-month Euro Libor

Responsible investing

Environmental, social, and governance (ESG) investing is integral in our day to day investment management process. We see ESG as part of our duty to protect your money. We actively engage investment management teams on ESG issues. We have and will in future decline investment opportunities where our criteria for ESG are not met.

Portfolio manager

Mohammed Sibda
Senior Portfolio Manager
BCom
Industry experience: 20 years

Name	Portfolio manager	Target	Risk	Term
Enhanced Global Equity	Mohammed Sibda	MSCI All Countries World Index	Extra high	5 to 7 years
Enhanced Global Bond	Mohammed Sibda	Citigroup World Government Bond Index	High	3 to 5 years
Classic Global Equity	Mohammed Sibda	MSCI All Countries World Index	Extra high	5 to 7 years
Classic Global Bond	Mohammed Sibda	Citigroup World Government Bond Index	High	3 to 5 years
Target Global Equity	Mohammed Sibda	MSCI All Countries World Index	Extra high	5 to 7 years
Target Global Bond	Mohammed Sibda	Citigroup World Government Bond Index	High	3 to 5 years
Flexible Global Active Balanced	Mohammed Sibda	70% MSCI All Countries World Index plus 30% Citigroup World Government Bond Index	Extra high	5 to 7 years
Flexible Global Passive Equity	Mohammed Sibda	MSCI All Countries World Index	Extra high	5 to 7 years
Flexible Global Passive Bond	Mohammed Sibda	Citigroup World Government Bond Index	High	3 to 5 years
Global Money Market	Mohammed Sibda	Local cash 85% Short-term Fixed Interest Composite Index Dollar cash 7.5% Three-month US Libor Euro cash 7.5% Three-month Euro Libor	Medium to high	7 years

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Sources: Momentum Outcome-based Solutions (Pty) Ltd