

# Responsible investment

## 2019 UN PRI assessment results

### Purpose

In 2006, Momentum Investments became one of the first United Nations-supported Principles for Responsible Investment (UN PRI) signatories in South Africa through the Momentum Outcome-based Solutions (Pty) Ltd and Momentum Asset Management (Pty) Ltd business licenses. It was agreed that all other businesses

within Momentum Investments should also report on the application of the responsible investment principles of the UN PRI. Therefore, Momentum Metropolitan Life Limited became an asset owner signatory to the UN PRI in 2017.

### The PRI principles

1. We will incorporate ESG issues into investment analysis and decision-making processes.
2. We will be active owners and incorporate ESG issues into our ownership policies and practices.
3. We will seek appropriate disclosure on ESG issues by the entities in which we invest.
4. We will promote acceptance and implementation of the Principles within the investment industry.
5. We will work together to enhance our effectiveness in implementing the Principles.
6. We will each report on our activities and progress towards implementing the Principles.

### The three main objectives from the assessment

- Facilitate learning and development, outlining how signatories' implementation of responsible investment compares year on year, across asset classes and with peers at the local and global level
- Identify how signatories can improve their responsible investment practices
- Allow asset owners to focus their discussions with investment managers on responsible investment activities and capabilities.

Please go to [unpri.org/signatories/mmi-group-limited/2413.article](https://unpri.org/signatories/mmi-group-limited/2413.article) to view Momentum Metropolitan Life Limited's full transparency report. The performance scores are interpreted as:

Score	Band
0%	E
Between 0% and 25%	D
Between 25% and 50%	C
Between 50% and 75%	B
Between 75% and 95%	A
Greater than 95%	A+

The assessment results for 2019 compared to 2018 are:

Summary scorecard	2019	2019 median	2018	2018 median
Strategy and governance	A+	A	A	A
Indirect: Investment manager selection, appointment and monitoring				
Listed equity	A	A	A	B
Direct and active ownership modules				
Listed equity: Incorporation	A	B	B	B
Listed equity: Active ownership	A	B	B	B
Fixed income: Sovereign, supranational and agency (SSA)	A	B	N/A	N/A
Fixed income: Corporate financial	A	B	B	B

## Why are the assessment results important to us?

Responsible investment practices contribute to our greater purpose, which is to enable businesses and people from all walks of life to achieve their financial goals and life aspirations. We help people grow their savings, protect what matters to them and invest for their future. By participating in the assessment, it helps us identify how

we can build further on our responsible investment initiative by identifying where we have shortcomings; how we can fill a more leading role relative to our peers going forward and support our various stakeholders with ongoing support on learning and development when it comes to responsible investment practices.

## Conclusion

As your key partner, we believe these assessment results will give you comfort knowing we take our fiduciary duty to heart and will continue to build on our responsible investment initiative.

