

Momentum FutureTrends Fund

Need:

Long-term capital growth

Term:

7+ years

Risk:

High

Benchmark:

MSCI AC World Index

ASISA sector:

Worldwide - Equity
- General

This unit trust is suited to investors with a high-risk profile who want a diversified and non-traditional, equity centric investment strategy. The fund is an actively managed high equity, multi-asset-class fund aiming to deliver long-term, real returns over periods longer than seven years.

The fund has a thematic evolutionary dynamic and focuses on the future investment landscape, targeting economic development and trends that will shape the future. It is a holistic solution that will not only target a single event or area of development but will capture a wide variety of themes that may affect the world.

The new concept of thematic investing has gained traction in the last 30 years, allowing investors to capitalise on future trends by identifying macro-level themes today that are likely to flourish in the coming years and even decades. Thematic investing is therefore an approach, which focuses on predictable long-term trends rather than specific companies or sectors, enabling investors to access structural, once-off shifts that can change an entire industry.

Today's examples of popular themes include the disruptive technologies of the Fourth Industrial Revolution, such as artificial intelligence, machine learning, robotics, blockchain and data analytics. Investment opportunities that are tied to the concept of sustainability, such as clean energy and green bonds, are also garnering much interest. Also, more recently, investors have been turning their attention towards healthcare given the global crisis that has been sparked by COVID-19.

Launch date :	September 2022
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Compliant to Regulation 28:	No
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Minimum lump sum amount:	R2,000
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Minimum monthly amount:	R250
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Investor profile

The Momentum FutureTrends Fund is suitable for investors with a high-risk profile who are aiming for long-term real returns above the MSCI All Country World Index over a minimum of seven-year rolling periods.

In an investment portfolio, this fund will give investors access to future trends that will shape the future of the world we live in, giving them access to higher-yielding growth asset classes that focus on future innovation. The fund is predominantly invested in offshore equity and is suitable only for long-term investors.

Fund risk profile

The fund has a high-risk profile due to its high allocation in offshore equities, which carries country-specific risks, such as potential constraints on liquidity and the repatriation of funds; macroeconomic risks; political risks; foreign exchange risks; tax risks; settlement risks; and potential limitations on the availability of market information.

Risk	Low	Low to Moderate	Moderate	Moderate to High	High		
Term	1m - 12m	1 - 3yrs	3+ yrs	4+ yrs	5+ yrs	6+ yrs	7+ yrs

Costs

Annual management fee of 0.7% p.a. (excluding Vat)

The fund may have other variable costs. For the most up-to-date costs, consult the latest minimum disclosure document or speak to your financial adviser.

Fund managers



Jako de Jager

Fund Manager

BCom (Hons) Investment Management
Managing the fund since February 2022



Eugene Botha

Deputy Chief Investment Officer

BSc (Hons), MSc
Managing the fund since February 2022

Contact us



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Disclaimer

This document should not be seen as an offer to purchase any specific investment fund and is not to be construed as advice. Investors are encouraged to obtain independent professional investment and taxation advice before investing with or in any of the management company's investment funds.

The terms and conditions, a schedule of fees, charges and maximum commissions, performance fee frequently asked questions as well as the minimum disclosure document (MDD) and quarterly investor report (QIR) for each fund are available at momentum.co.za.

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Sources: Momentum Investments