

Momentum Quality Equity Fund



The fund invests predominantly in high quality local shares. Quality companies are superior in terms of profitability, credibility and stability. Profitability measures how well a company converts owners' capital into assets, sales and earnings. Earnings should be stable and should be credible, meaning there should not be a material difference between cash generated and reported earnings.

The fund objective is to maximise returns over the FTSE/JSE Capped Shareholder-weighted All-Share Index over time. The fund follows a rules-based investment process and decisions are based on objective data.

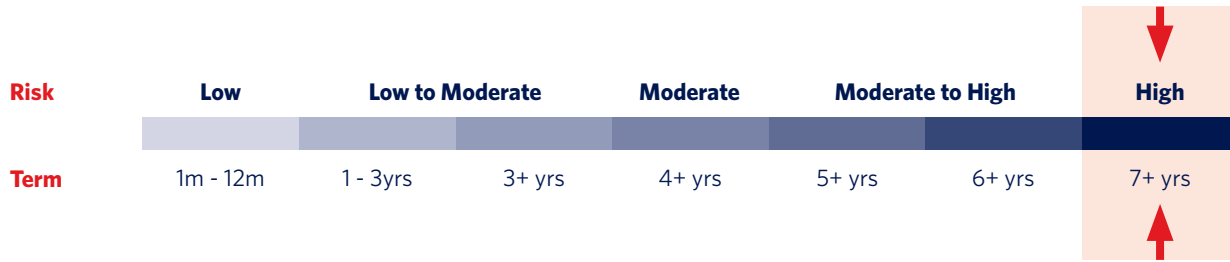
Launch date :	July 2021
Minimum lump sum amount:	R2,000
Minimum monthly amount:	R250

Investor profile

The fund's risk and return profile is not dissimilar to those of traditional equity funds. It gives clients the opportunity to achieve benchmark beating returns at an attractive cost. The fund is suitable for investors who believe in buying quality shares, who have a long-term investment horizon and who can tolerate high risk.

Fund risk profile

The Momentum Quality Equity Fund is firstly exposed to the inherent risk of the SA equity market as a whole and secondly to the risk that the quality investment style underperforms. Investors are also exposed to share-specific risks.



Fund managers



Loftie Botha

Portfolio manager

B Eng Industrial, B Com (Hons)
Investment Management, M Com
Business Management



Imtiaz Mohammed Alli

Portfolio manager

BCompt

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.

Momentum Investments and Momentum Collective Investments (RF) (Pty) Ltd are part of Momentum Metropolitan Life Limited, an authorised financial services and credit provider (FSP6406)

Sources: Momentum Outcome-based Solutions (Pty) Ltd