



momentum
investments

MFP
OUTCOME MATTERS

Martin Riekert

Business update

23 November 2021

Retail distribution update

51,000

Paid income to 51k MFP clients.
Total income of R396m paid.



IMPACT

This is how we affected the lives of our MFP clients



Enabled 101 clients to retire with a total retirement value of R37m



101

R127m

Provided investment return of R127m for MCI clients

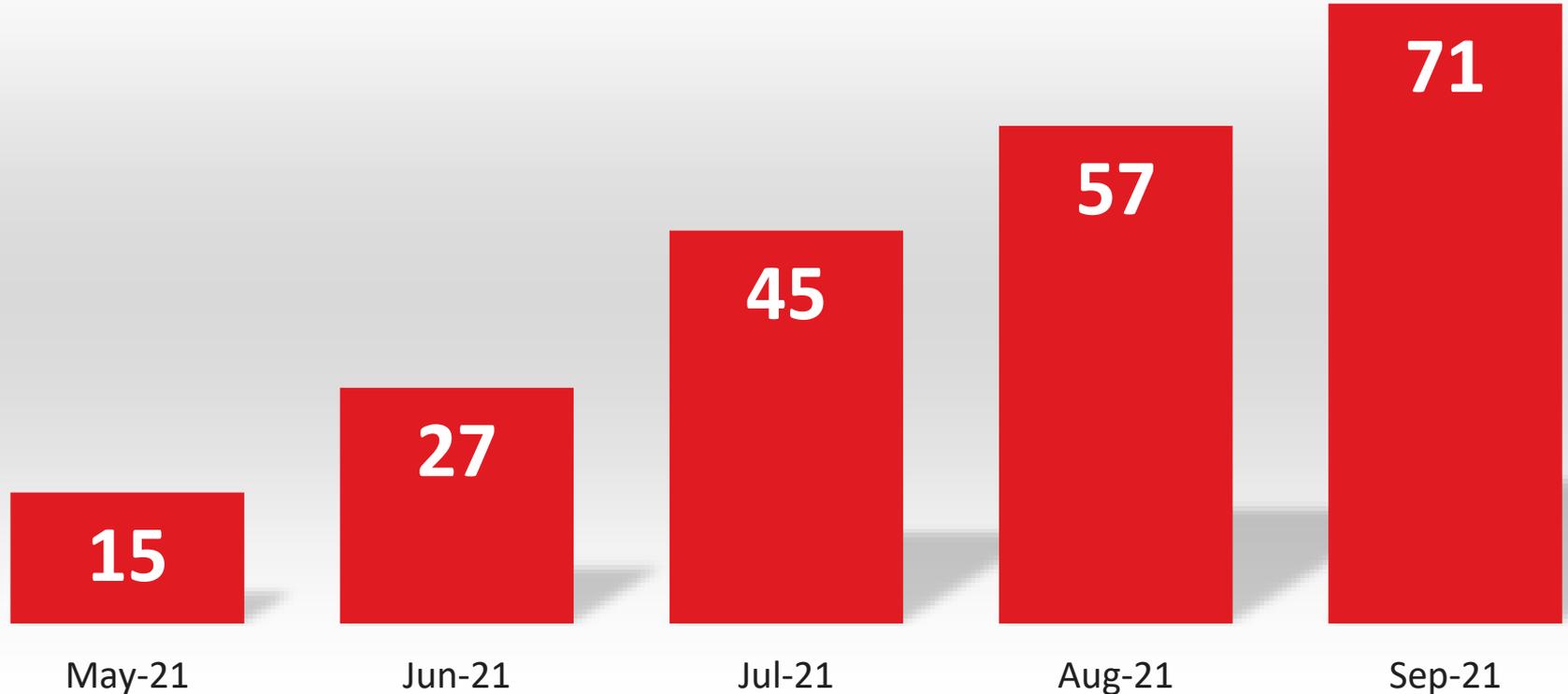
R111m

R111m of investment return to MIC clients

MFP Focus model portfolio overview



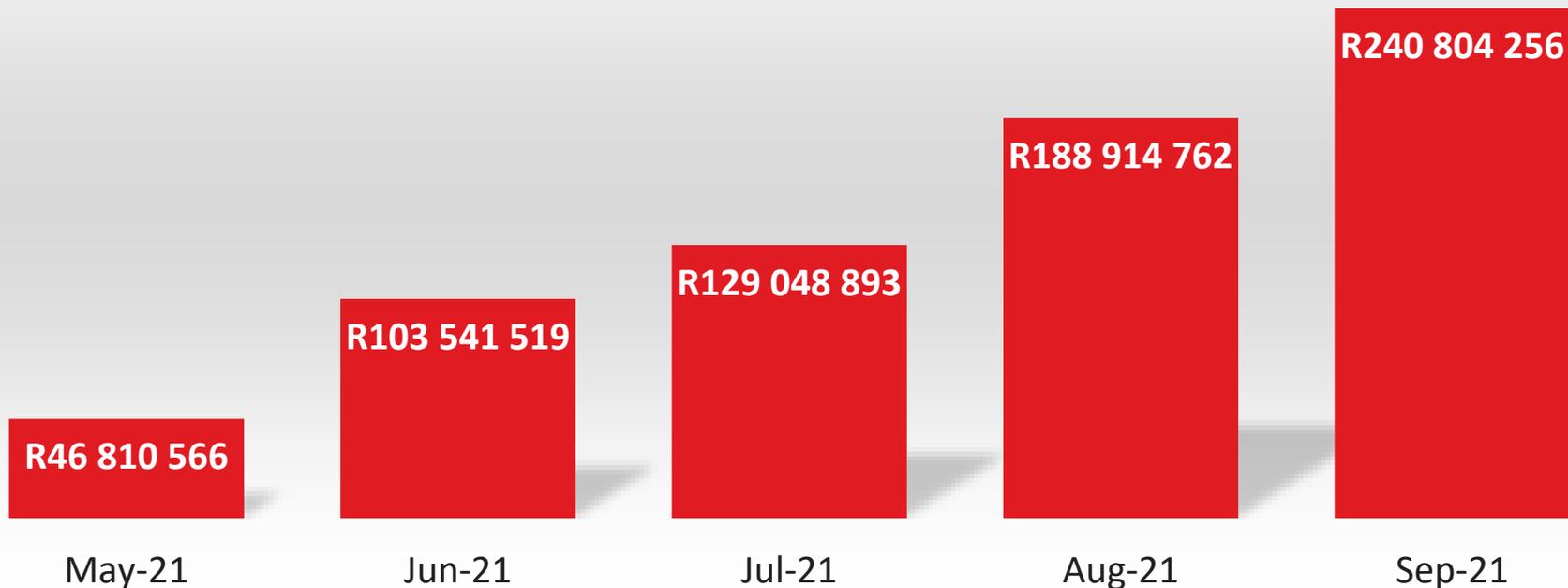
Number of planners using the MFP Focus models at 30 September 2021



MFP Focus model portfolio overview



Assets under management per month at 30 September 2021



This presentation is applicable to the following Momentum Investments authorised financial services providers in terms of the Financial Advisory and Intermediary Services Act, 2002 (FAIS) and registered entity:

- Momentum Asset Management (Pty) Ltd (FSP 623)
- Momentum Outcome-based Solutions (Pty) Ltd (FSP 19840)
- Momentum Investment Consulting (Pty) Ltd (FSP 32726)
- Momentum Alternative Investments (Pty) Ltd (FSP 34758)
- Momentum Collective Investments (RF) (Pty) Ltd (registration number: 1987/004287/07)

The information used to prepare this document includes information from third-party sources and is for information purposes only. Although reasonable steps have been taken to ensure the validity and accuracy of the information contained herein, Momentum Metropolitan Life Limited does not guarantee the accuracy, content, completeness, legality or reliability of the information contained herein and no warranties and/or representations of any kind, expressed or implied, are given to the nature, standard, accuracy or otherwise of the information provided.

Neither Momentum Metropolitan Life Limited, its affiliates, directors, officers, employees, representatives or agents (the Momentum Parties) have any liability to any persons or entities receiving the information made available herein for any claim, damages, loss or expense, including, without limitation, any direct, indirect, special, incidental, punitive or consequential cost, loss or damages, whether in contract or in delict, arising out of or in connection with information made available herein and you agree to indemnify the Momentum Parties accordingly. For further information, please visit us at momentum.co.za. Momentum Investments is part of Momentum Metropolitan Life Limited, an authorised financial services and registered credit provider, and rated B-BBEE level 1.

Sources: Momentum Investments, IRESS



momentum
investments

MFP
OUTCOME MATTERS

Thank you