

momentum
investments

MFP
OUTCOME MATTERS

Natalie Harrison

How we are equipping you on the MFP global house view

29 July 2021

With us, investing is personal



MWI
specialists

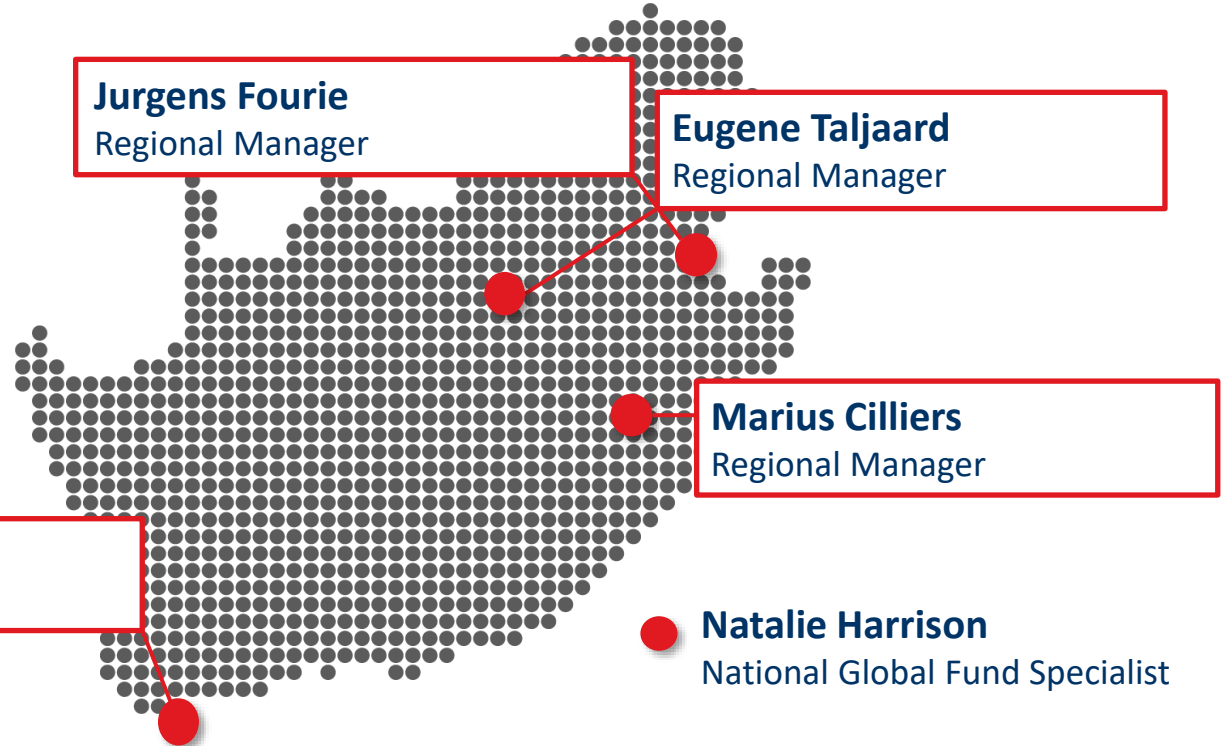
Fund
specialist

Global
Matters
portal

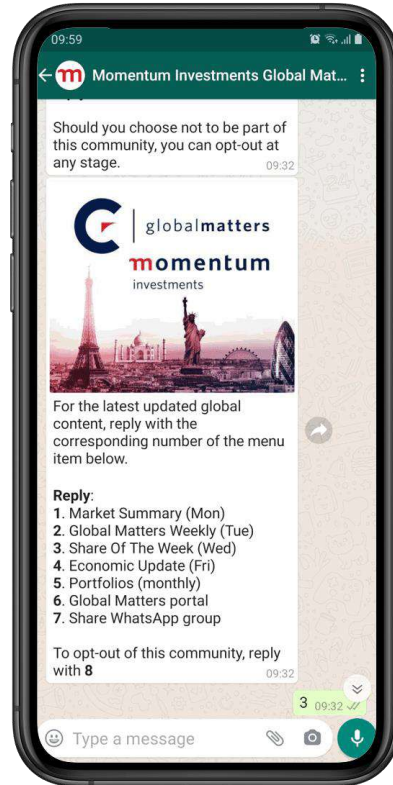
Platform
availability

WhatsApp
bot

Global specialist support



WhatsApp chat bot



Global Matters portal



Global Matters: investing offshore

The world of offshore investing can seem quite daunting, but doesn't have to be. To cut through the complexity, Momentum Investments has launched a world class portal to address all your offshore investment concerns, challenges and even more best practice. Visit our Global Matters Journal for in-depth views on offshore investment advice, legislation and top-of-mind matters to structure and get your clients to their investment goals.



Thought leadership

We bring you some of our latest thinking on global investments and markets.

MAY 2021

Commentary on the market environment and asset allocation views

Monthly Viewpoint

[Download report \(pdf\)](#)

APRIL 2021

Commentary on the market environment and asset allocation views

Monthly Viewpoint

[Download report \(pdf\)](#)

MARCH 2021

Commentary on the market environment and asset allocation views

Monthly Viewpoint

[Download report \(pdf\)](#)

Momentum Wealth and Momentum Wealth International's capabilities

In a daunting investment world full of jargon and complexity, the capability wheels are comprehensive tools to navigate through the spheres of investment platforms, products and the different types of components, both locally and abroad.



Why Momentum Investments?



Share this video



Momentum Global Investment Management

In this introductory video about Momentum Global Investment Management, we will share with you who we are, how we invest, what makes our investment philosophy unique and why we believe you should meet with us.

[Visit Momentum.co.uk](#)

Stronger platform for growth

Momentum Global Investment Management (MGIM), Momentum Investments' International Investment Management Division, has acquired Serenac Investment Managers. The combined platform offers a comprehensive suite of strategies for financial advisers, including a range of multi-asset funds and model portfolio solutions, to help them deliver appropriate outcomes for investors.

[Visit Momentum](#)



Global Matters Weekly

Our weekly blogs are aimed at providing our rapidly expanding global client base with a good mix of deep investment insights, combined with a topical twist and an improved, easy-to-digest tone.

May - June 2021

January - April 2021

Past performance is not indicative of future results

Greg Moplew

"Past performance is not indicative of future results" is a warning on most investment material that everyone ignores but not many people seem to actually implement into their decision making.

[Read more](#)

Patience is a Virtue

Stephen Nguyen, CFA

Being patient in the face of adversity is key to a happy life, and a healthy investment portfolio. Good things truly do come to those who wait.

[Read more](#)

For what it's worth

Richard Parlett

What is it worth then? This is a question investors should be asking themselves all the time. However, the true answer is not always obvious.

[Read more](#)

MWI secure portal



The screenshot displays the Momentum Investments secure portal interface. At the top left, the logo reads "momentum investments". A navigation bar includes "Investors", "Documents", "Fund Selector", "Tools", "Online", and "News". A "Logged in as:" field is visible on the right.

A modal window titled "View and email documents" is open, containing the following text and options:

Select from the list of custom outputs and send an email with the attached documents directly to your client (or to an alternate address).

- [Proposal document](#)
- Application form
 - [Capital Redemption Bond](#)
 - [Life Insurance Bond](#)
- [Successor Contract Owner Nomination Form](#)
- [Nomination of Beneficiaries of Proceeds Form](#)
- [Product brochure](#)
- [Attach MS_X-rgy.pdf](#)
- [Fund Fact Sheet](#)

FFSs are not available for some of the selected funds.

XYZ@momentum.co.za SEND

Enter multiple addresses separated by ; or .

In the background, the "Fund Selector" page is visible, showing a "Favourites" section with a table of fund ratings:

| Favourite | Rating 1 | ADD ALL |
|-----------|----------|-----------------------|
| | ★★★ | <input type="radio"/> |
| | ★★★ | <input type="radio"/> |
| | ★★★★ | <input type="radio"/> |

Other visible elements include a "Portfolio" overview with "Selected Items: 0" and buttons for "SHOW PORTFOLIO", "SAVE", "NEW", and "AUTO SPLIT". A vertical "Feedback" button is on the right edge.

Platform availability



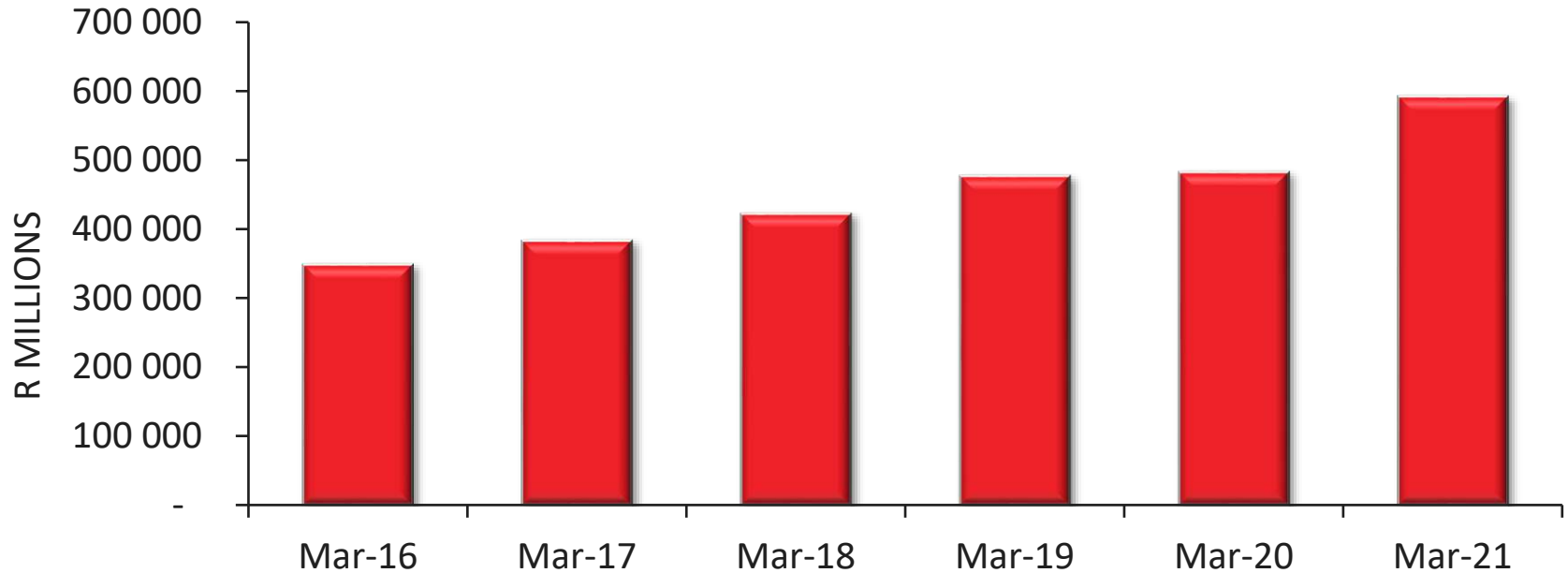
Where can you access the solutions?

| USD-denominated funds | Rand-denominated funds |
|-------------------------------|---|
| Momentum Global Cautious Fund | Momentum International Conservative Feeder Fund |
| Momentum Global Managed Fund | Momentum International Balanced Feeder Fund |
| Momentum Global Growth Fund | Momentum International Equity Feeder Fund |
| Momentum Wealth International | Momentum Wealth |
| Momentum Wealth | |

Increasing global investments



Assets under management in foreign collective investment schemes



Source: ASISA at 31 March

**'Time in the
market almost always
beats timing the market'**

Ken Fisher

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The value of investments in discretionary accounts, and the income derived, may fluctuate and it is possible that an investor may incur losses, including a loss of the principal invested. Past performance is not generally indicative of future performance. Investors whose reference currency differs from that in which the underlying assets are invested may be subject to exchange rate movements that alter the value of their investments.

Under our multi-management arrangements, we selectively appoint underlying sub-investment managers and funds to actively manage underlying asset holdings in the pursuit of achieving mandated performance objectives. Annual investment management fees are payable both to the multimanager and the manager of the underlying assets at rates contained in the offering documents of the relevant portfolios (and may involve performance fees where expressly indicated therein).

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Thank you