



**momentum**  
investments

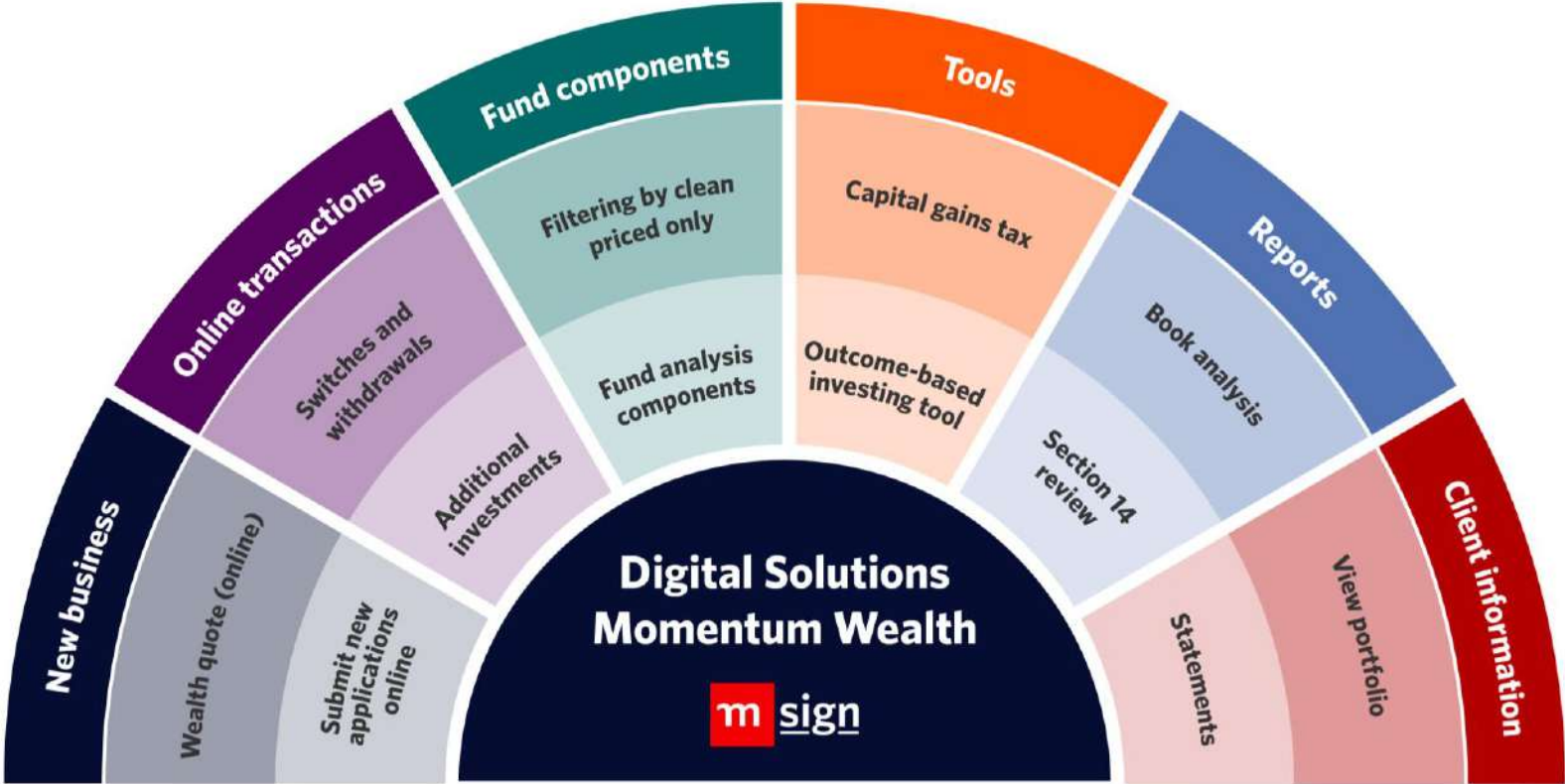
# **MFP** **OUTCOME MATTERS**

**Stefan Nel**

**A refresher on digital matters**

29 July 2021

# Momentum Wealth digital solutions



# Online capturing process

**1** Switch details

**2** Validate & submit

**3** Confirmation

## Declarations

I confirm that in addition to intermediary services, I have also given the following service:

- Advice

✓ x

I have received confirmation from my client to proceed with this instruction. I have explained to the client all the relevant **Terms** applicable to both Online Instructions and **Local switch** Instructions.

✓ x

## Please note

A minimum investment amount may be imposed by the fund manager.

# Managing your client's funds



The screenshot displays a web interface for managing funds. At the top, a dark navigation bar contains tabs for 'Investors', 'Funds' (highlighted in red), 'Tools', 'Reports', and 'Library'. Below this, a row of filter buttons includes 'All funds' (highlighted in red), 'Outcome-based Solutions', 'Core Portfolio', 'Fundshop', and 'My Portfolios & Favourites'. A search bar with the placeholder text 'Search' is positioned above a 'CLEAR ALL FILTERS' button. Below the search bar, there are several filter dropdown menus: 'MANAGER: MOMENTUM', 'TYPE: ALL', 'STATUS: ACTIVE', 'DOMICILE: ALL', 'CURRENCY: ALL', and 'ASISA: ALL'. At the bottom, there are five checkbox options: 'Clean priced only' (checked), 'Reg 28 managed only', 'For Tax Free Savings', and 'Shari'ah compliant'. An information icon (i) is located between the 'Clean priced only' and 'Reg 28 managed only' options.

# A full suite of reporting capabilities



Investors

Funds

Tools

Reports

Library

1. REPORTS / REPORT SCHEDULER / ADD NEW SCHEDULE

## Add new schedule

Scheduled report name

Temporary unsubscribe

Active

Report scheduled frequency

Daily

Report schedule date

Start:

19/07/2021



End:

19/07/2022





# Part of the Momentum Investments family <sup>™</sup>



# Disclaimer

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The logo for Momentum Investments, featuring the word "momentum" in a blue sans-serif font with a red lowercase "m", and the word "investments" in a smaller, blue sans-serif font below it.

momentum  
investments

The main title of the presentation, "MFP Outcome Matters", displayed in large, bold, blue sans-serif capital letters. The "MFP" part is significantly larger and more prominent than the rest of the title.

**MFP**  
**OUTCOME MATTERS**

The closing text of the presentation, "Thank you", written in a red sans-serif font.

Thank you