Investment components

momentum
wealth international

Momentum Wealth International offers a sophisticated investment framework for advisers to **build customised portfolios** that align with their clients' unique investment goals, time horizons, and risk profiles. The platform provides access to a combination of global actively managed investment funds (unit trusts), cost-efficient ETFs, discretionary model portfolios, and fully tailored international personal share portfolios.

These components empower advisers to create **globally diversified investment strategies** across asset classes, geographies, currencies, and mandates, all managed on a single, streamlined investment platform.

Investment funds

The platform provides access to a wide range of clean-priced global funds spanning multiple sectors and regions, managed by reputable investment managers. These solutions are carefully selected to meet diverse risk profiles and long-term investment goals.

curate
THE ART OF INVESTING

Investors can also benefit from access to **Curate Investments**, our global investment manager partner. Each Curate fund is managed by a world-class investment team, handpicked for their proven ability to deliver over time, whether you're seeking deep value, innovation, long-term resilience or low-cost passive alternatives. Curate's fund range gives investors access to the best ideas from top investment managers all over the world, whatever their investment goals.

Exchange-traded funds

Momentum Wealth International provides access to a comprehensive range of passive and index-tracking ETFs. These solutions have gained traction among cost-conscious investors seeking targeted exposure to specific regions, industries, or investment styles. ETFs enhance portfolio transparency and liquidity while reducing costs, enabling the efficient construction of globally diversified portfolios tailored to long-term goals.

Model portfolios

The platform enables multiple discretionary fund managers (DFMs) to manage model portfolios directly in the Momentum Wealth International ecosystem. These model portfolios cover a variety of investment outcomes, asset class mixes, and currencies, offering scalability, consistency, and ease of administration.

Equilibrium, our discretionary fund manager partner, delivers outcome-based, multi-asset portfolios that are dynamically managed to meet the evolving needs of South African investors. Their solutions combine disciplined risk management with global insight, ensuring portfolios remain aligned to client objectives across market cycles.

International personal share portfolios

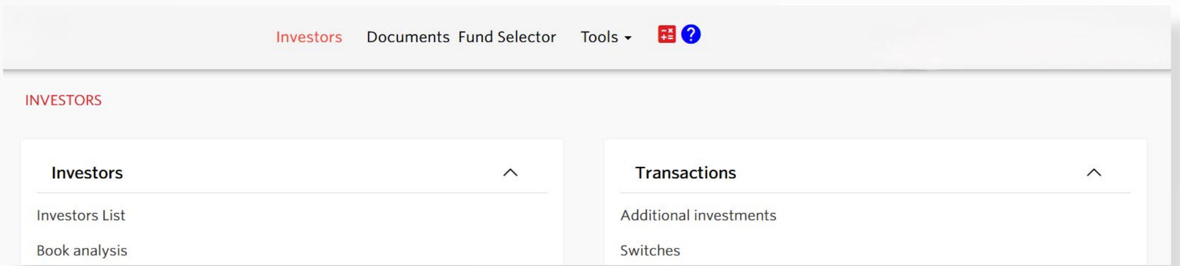
Momentum Wealth International supports international personal share portfolios for clients requiring bespoke investment solutions. It allows direct investment in global listed securities. Advisers can work with a network of trusted investment managers and stockbrokers, including Momentum Securities, our in-house stockbroking and wealth management business.

Momentum Securities offers tailored portfolio solutions including direct equity, fiduciary deposits, structured notes and discretionary mandates supported by robust research and execution capabilities. International personal share portfolios offer maximum flexibility and customisation, making them ideal for clients with complex needs related to currency, tax, liquidity, and specific ethical or sector preferences.

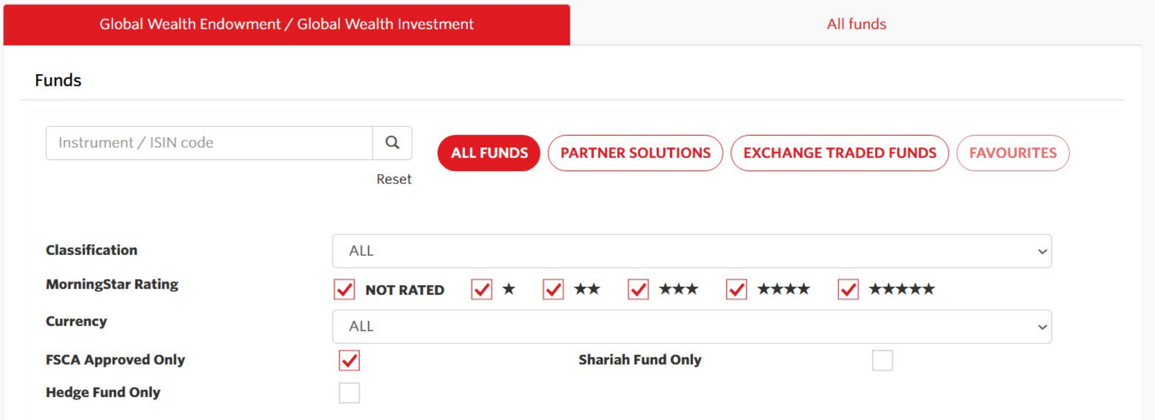
Where to find the fund list

If you are a financial adviser and have a user account on momentum.co.gg, please log in to access the fund list.

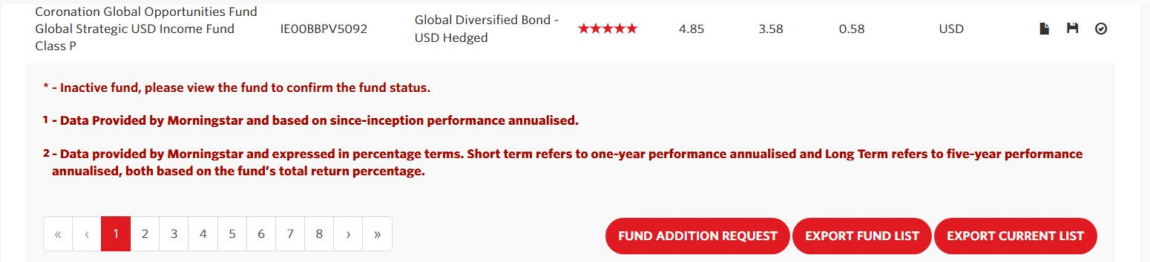
- Click on ‘Fund Selector’ at the top of the page.



- The ‘Global Wealth Endowment/Global Wealth Investment’ tab contains the funds and ETFs available for these products.
- The ‘FSCA Approved Only’ filter is selected by default, but you can select or deselect any of the filters to refine your search.



- Click the buttons at the bottom of the page to export a fund list in Excel or PDF format.
  - Choose the ‘Export Fund list’ to export a list of all the available funds. This list contains trading information for each fund.
  - Choose ‘Export Current list’ to export the filtered fund list based on the criteria selected.



If you would like to find out more about how Momentum Wealth International empowers South African clients to invest globally with confidence, please speak to your Momentum consultant or visit momentum.co.gg.

Client service

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