



Momentum
without
Borders

momentum
wealth international

Beyond borders

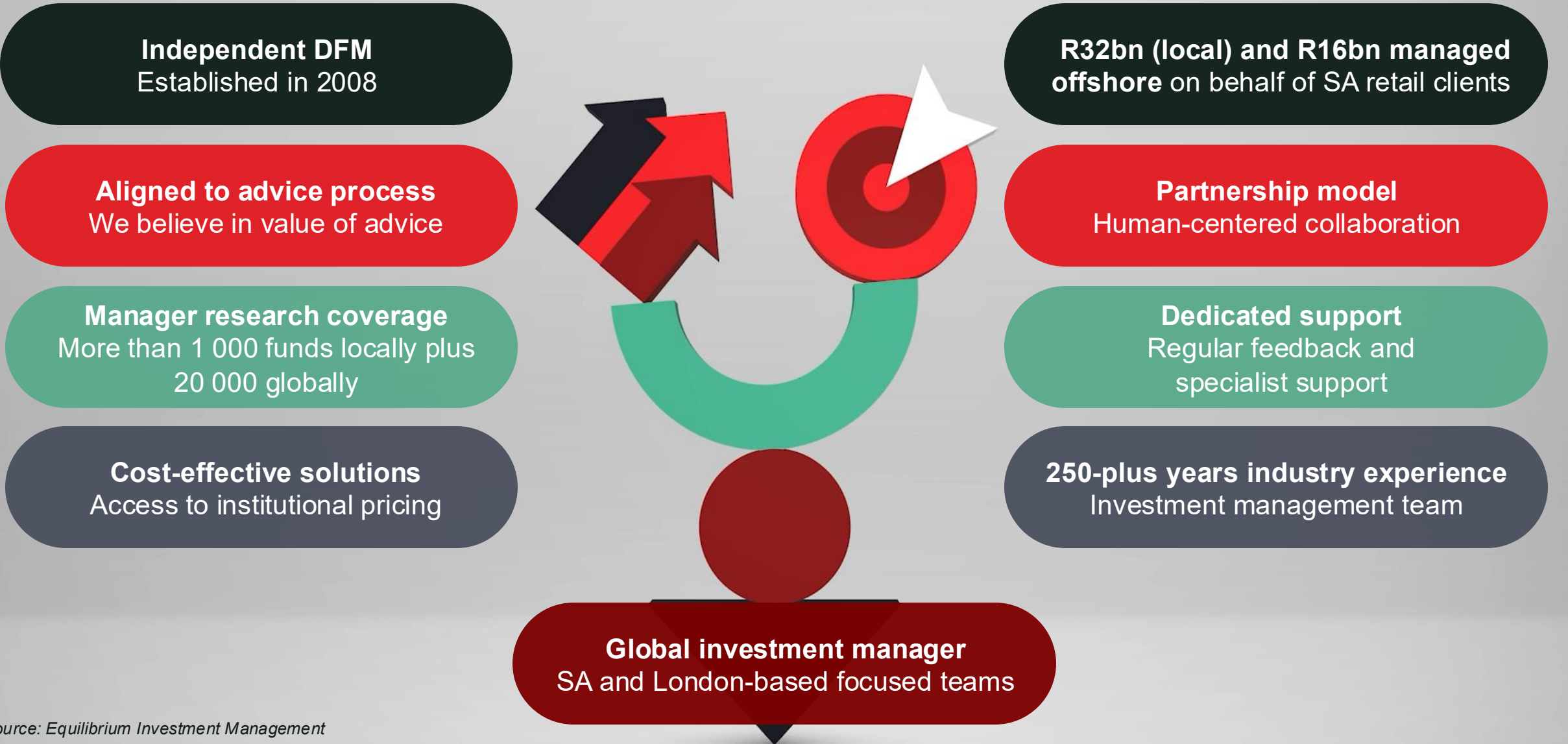
Embedding global thinking
into portfolio construction



Going global with Equilibrium Investment Management

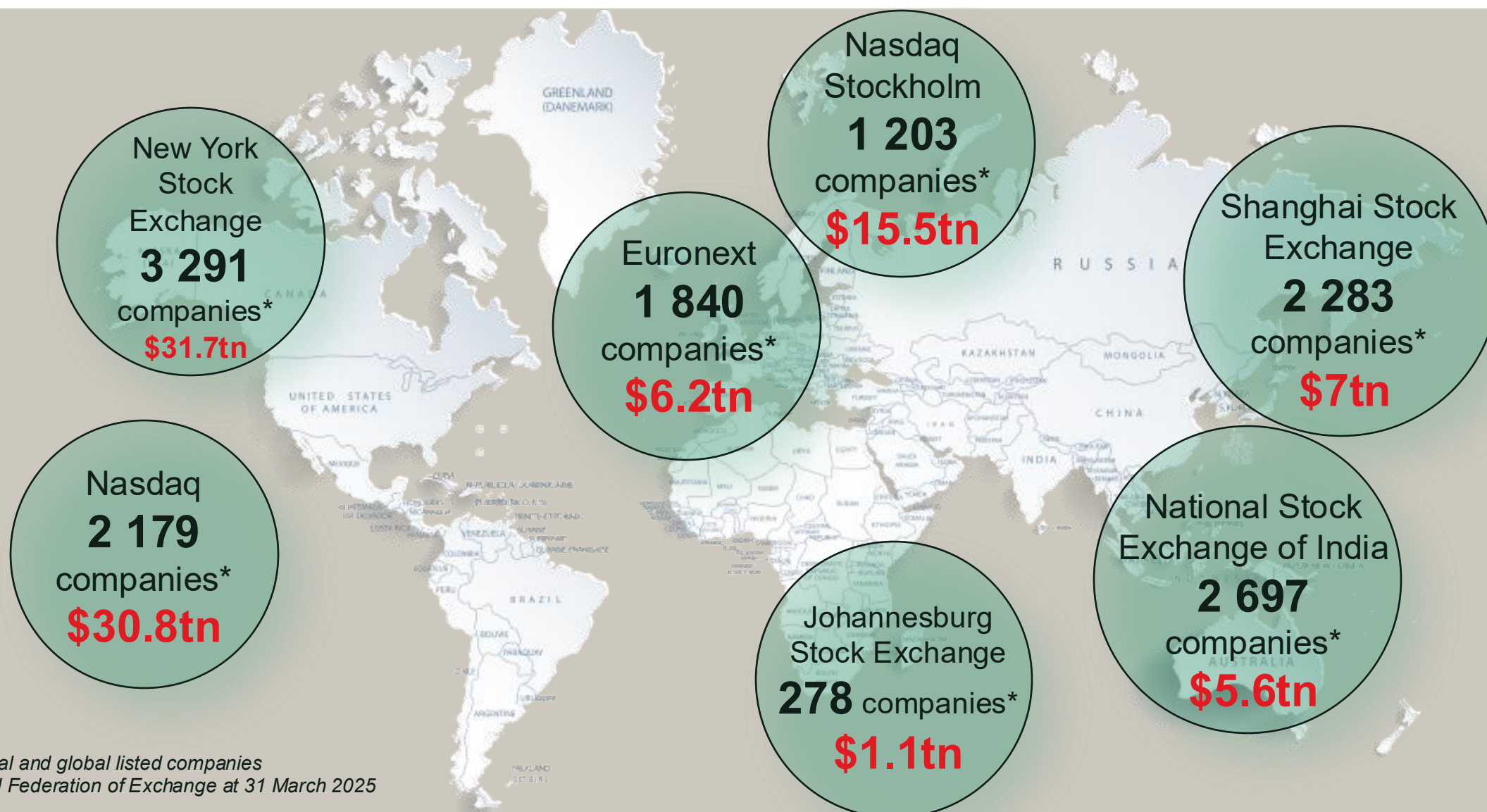


Why Equilibrium Investment Management?



Diversify your asset base into large and deeper market

equilibrium

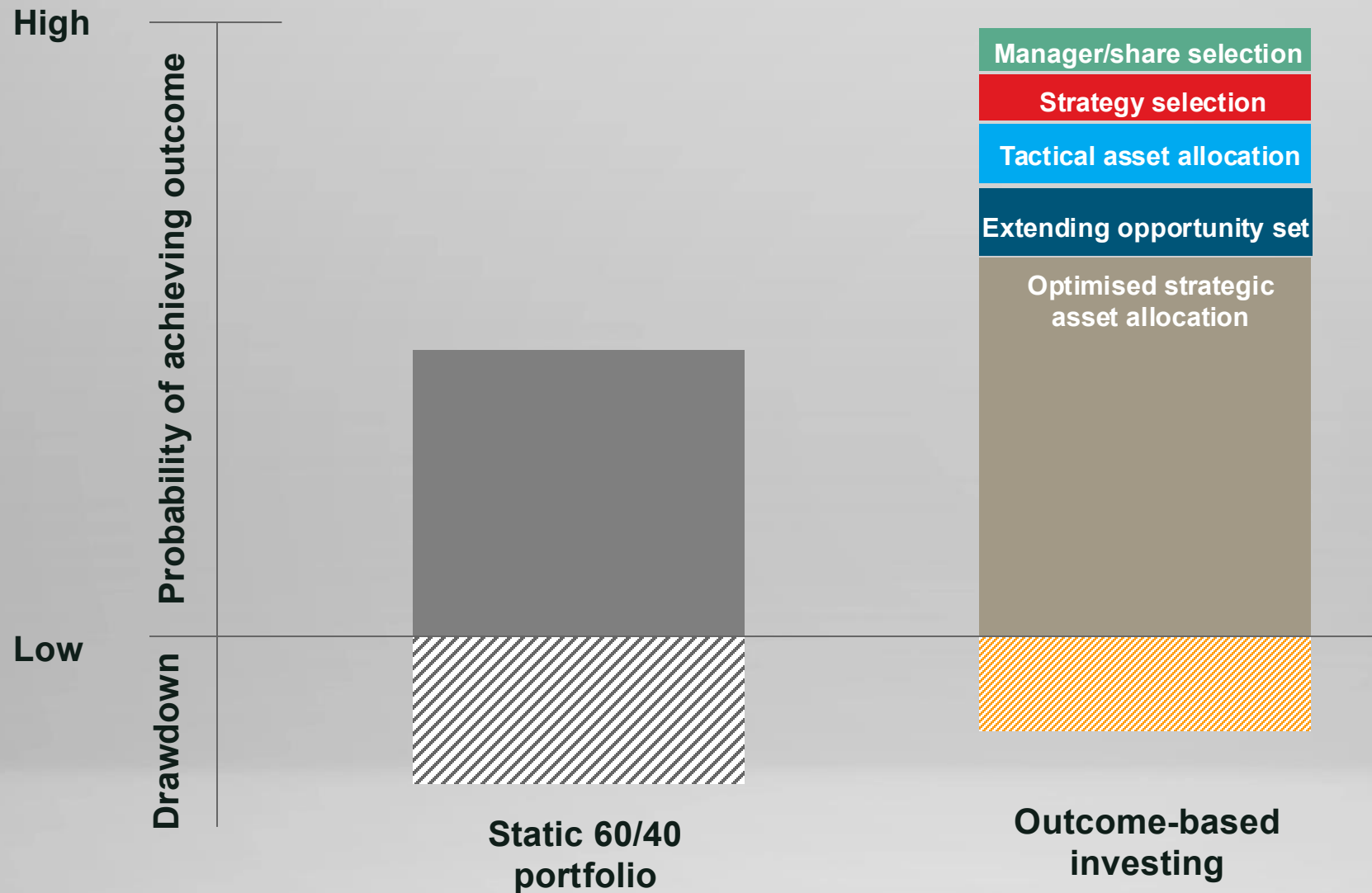


*Number of local and global listed companies
Sources: World Federation of Exchange at 31 March 2025

Source of returns

Levers to increase the probability of achieving outcome

equilibrium



Global team credentials



Founded in
1998

£6.7bn*
AUM

Award-winning
solutions



Track record in building
multi-manager portfolios
(>20 years)

- Part of Momentum Metropolitan Life Limited
- Large life company balance sheet

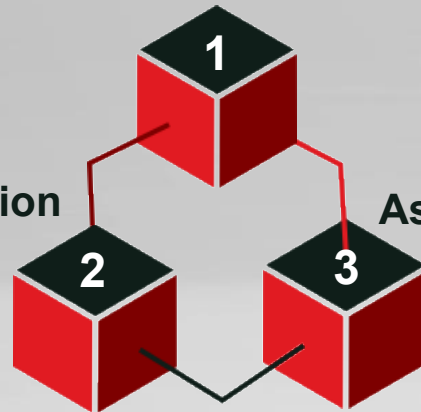
**In-house
capabilities**



Manager research

Innovation

Asset allocation



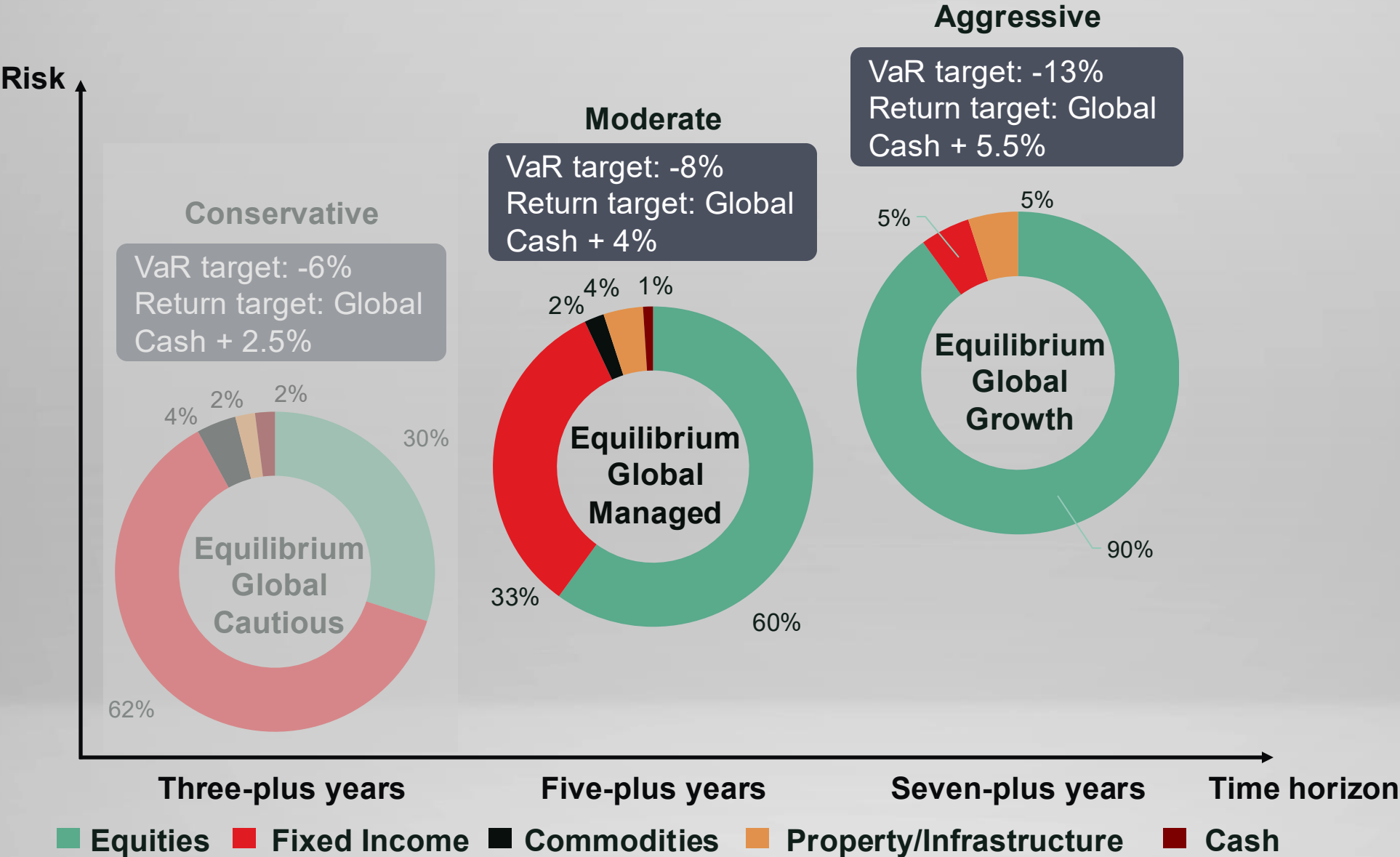
**AUM at 31 March 2025*

Investment management team



Equilibrium global model portfolios

Range of risk-profiled US dollar solutions



Global portfolio allocations

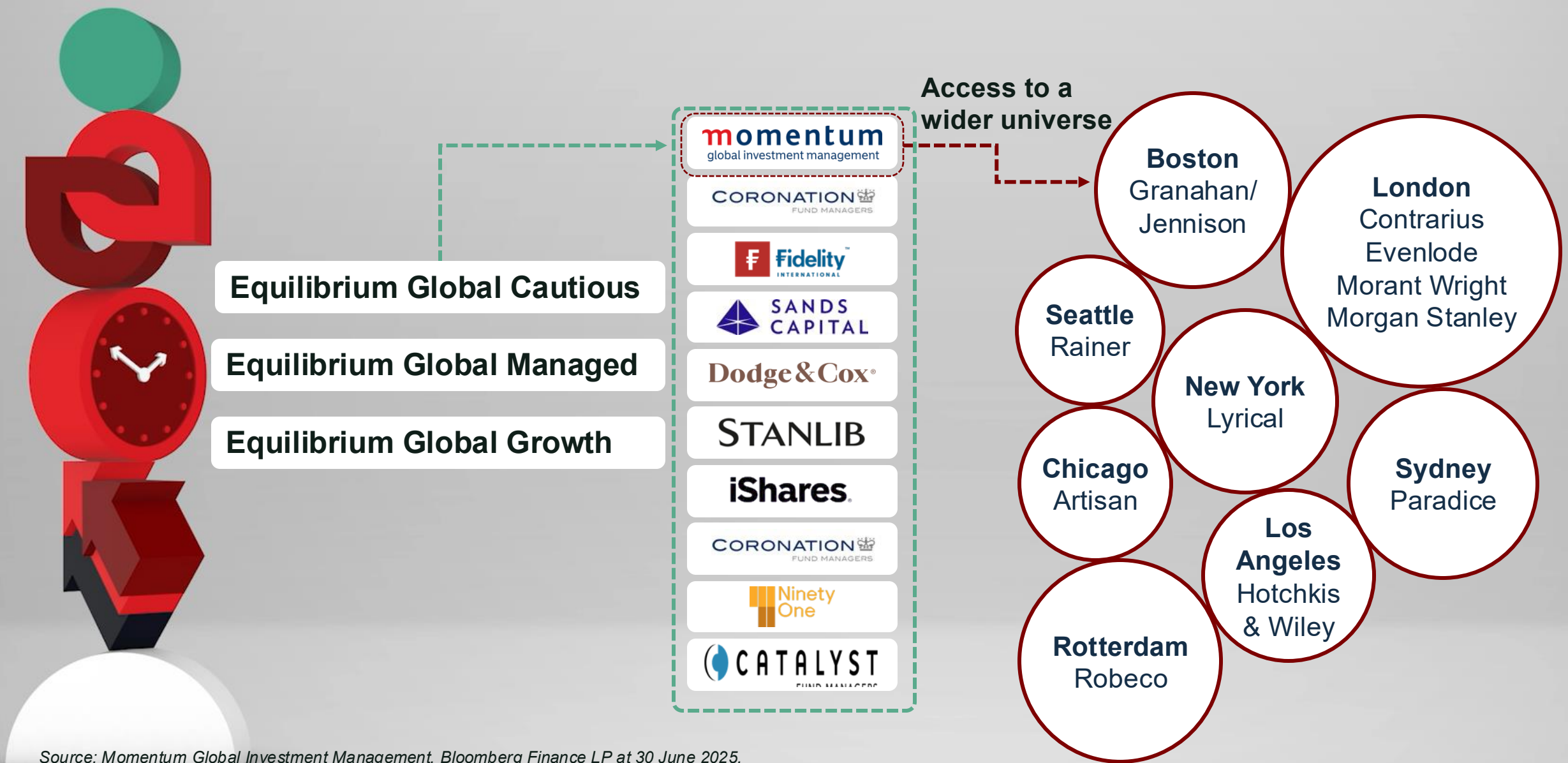
equilibrium



		TIC	Equilibrium Global Cautious	Equilibrium Global Managed	Equilibrium Global Growth
momentum global investment management	Momentum GF Global Equity X USD	0.54%	24.50%	47.50%	73.00%
CORONATION FUND MANAGERS	Coronation Global Emerging Markets	1.37%			4.75%
Fidelity INTERNATIONAL	Fidelity Emerging Markets	2.14%	1.75%	3.00%	4.75%
SANDS CAPITAL	Sands Capital Emerging Markets Growth	1.04%	1.75%	3.00%	4.75%
Dodge & Cox®	Dodge & Cox Global Bond	0.58%	20.00%	12.00%	
STANLIB	STANLIB Global Bond	0.82%	10.00%	5.00%	
iShares®	iShares Global Government Bond	0.21%	20.00%	8.00%	
CORONATION FUND MANAGERS	Coronation Global Strategic USD Income	0.58%	10.00%	5.00%	
Ninety One	Ninety One Global Gold	2.48%	4.00%	3.00%	1.00%
CATALYST FUND MANAGERS	Catalyst Global Real Estate	0.90%	1.75%	4.50%	6.00%
Ninety One	Ninety One US Dollar Money	0.40%	6.25%	6.00%	5.75%
			100.00%	100.00%	100.00%

Source: Momentum Global Investment Management, Bloomberg Finance LP at 30 June 2025.

Global portfolio allocations



Global portfolio allocations



	Equilibrium Global Cautious	Equilibrium Global Managed	Equilibrium Global Growth
Weighted total investment cost	0.63%	0.69%	0.71%
Discretionary fund management (DFM) fee	0.25%	0.25%	0.25%
Total portfolio fee	0.88%	0.94%	0.96%

Source: Momentum Global Investment Management, Bloomberg Finance LP at 30 June 2025.

Trailing returns to 30 June 2025

equilibrium

	Three months	One year	Three years	Five years	Seven years
Equilibrium Global Cautious Portfolio	6.3%	12.4%	8.6%	4.7%	4.2%
Global Cash +2.5%	4.9%	11.6%	7.1%	4.2%	3.8%
Peer Group Median	4.3%	9.4%	6.4%	3.2%	2.7%

	Three months	One year	Three years	Five years	Seven years
Equilibrium Global Managed Portfolio	8.7%	14.7%	11.7%	7.1%	5.8%
Global Cash + 4.0%	5.3%	13.2%	8.7%	5.7%	5.3%
Peer Group Median	6.9%	10.5%	9.0%	5.9%	4.5%

	Three months	One year	Three years	Five years	Seven years
Equilibrium Global Growth Portfolio	11.2%	16.7%	14.8%	10.0%	7.1%
Global Cash + 5.5%	5.7%	14.8%	10.2%	7.2%	6.8%
Peer Group Median	8.1%	10.6%	11.1%	8.1%	6.7%



Source: Momentum Global Investment Management, Bloomberg Finance LP at 30 June 2025.

Reduced MWI platform fees



Momentum Wealth Local

Standard

Equilibrium

<R1 500 000

0.50%

0.40%

Next R3 500 000

0.25%

Next >R5 000 000

0.15%

Momentum Wealth International

Standard

Equilibrium

First \$200 000

0.45%

0.35%

Next \$300 000

0.35%

Next \$500 000

0.25%

Next \$1 000 000

0.20%

Next \$2 000 000

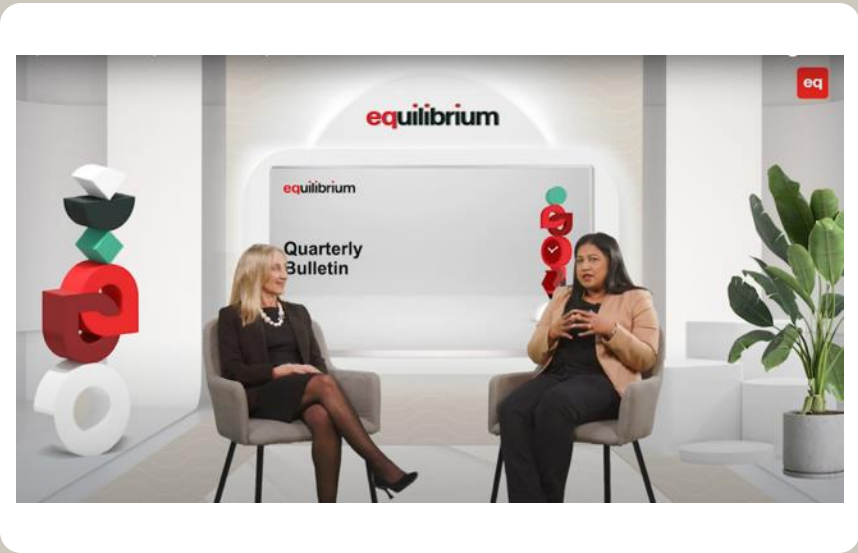
0.15%

Preferential platform pricing on
Momentum Wealth (full discretion only)

Partnership benefits



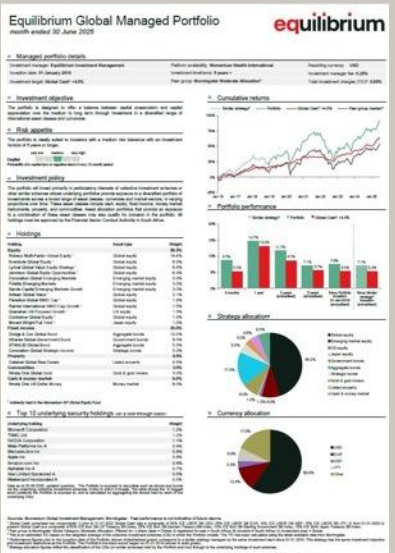
Quarterly CPD
accredited update
webinar



Quarterly in-person
investment committee with
offshore portfolio manager
(bespoke only)



Quarterly
investment report
(standard or
co-branded)



Monthly fact sheets
(standard or
co-branded)

Q&A with Richard Stutley



Thank you



Disclaimers

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