momentum
investments

With us, investing is personal

When it's personal, it really matters – you give it your best to make sure you are successful.

We understand everyone is different and to you, your investment isn't just another investment. You don't invest for the sake of investing. You invest to make your dreams and aspirations come to life.

With us, investing is personal. From how our experts push the boundaries to create innovative and tailored solutions that can help you achieve your goals on your investment journey, to how we act as the guardians of your legacy, it's personal.

It's your personal investment, with the unstoppable force of momentum.

What we're about

We help individuals, businesses and retirement funds invest with confidence, and stay invested.

It starts with a clear map of your needs, destination and a plan of the best way to get there. You can choose from a wealth of investment options to suit each of your investment needs and goals.

Conventional wisdom

You have specific needs and you often think you need a particular investment, but when it doesn't perform according to your expectations immediately, you get nervous. You can change your thinking and realise that staying the course is as important as choosing the right investment portfolio.

We don't know what your investment experiences have been like. People tend to look at arbitrary benchmarks, compare your investments to those – and sometimes then act against their own best interest. Maybe you've had to pull your money out of a risky investment loaded with shares when your bullish sentiments turned nervous.

Maybe you've been stuck in inflation-hungry cash after you had burnt your fingers.

Old habits die hard. We can help you focus on a particular goal and within the timeframe you determine.

Out with the old, in with the new

Our investment philosophy is that over a chosen period, based on prevailing market conditions we target a reasonable return and we define risk as the likelihood that the investment portfolio won't deliver the return it's targeting. It may sound like semantics. However, it means risk doesn't have to be reduced to three simple definitions of 'low', 'medium' and 'high' any longer, but can be described in sync with your goals: Will you or won't you achieve your investment goal and, if you miss it, by how much will it be?

This approach, called outcome-based investing, has gained ground in countries like the UK, the US and Germany. We have followed this approach with our institutional clients, such as retirement funds, since 2011 and individuals are also benefitting greatly from the skills and expertise we gained with this approach.

Who we are

Our history

Momentum Investments was established on 1 December 2010, as a direct result of Momentum Metropolitan consolidating all its investment capabilities. We have deep roots in multi- and single investment manager disciplines and we are proud that we introduced multi-manager investment management to the South African market.

We offer a brand that has a strong reputation for ethics, honesty, integrity and transparency, as well as stability and governance. The security of the Momentum Metropolitan Life Limited balance sheet offers protection that few others can.

Our executive team

Ferdi van Heerden
CEO: Momentum Investments

Institutional Investments
Theo Terblanche

- Portfolio Management – **Mike Adsetts**
- Institutional Distributions – **Wayne Dennehy**
- Institutional Operations – **Jannie du Randt**

Retail Investments
Martin Riekert

- Equilibrium – **Florbela Yates**
- Wealth & Wealth International – **Hymne Landman**
- Momentum Collective Investments (MCI) – **Martin Riekert**
- Annuities – **Fareeya Adam**
- Retail Distribution Enablement – **Aldert Brink**
- Retail Service and Operations – **Marisa Meyer**

Momentum Global Investment Management (MGIM)
Ferdi van Heerden

Enablement

- Marketing – **Fränzo Friedrich**
- Governance – **Daleen Lessing**
- Human Capital – **Desiré Pauw**
- Finance – **Renée Rautenbach**
- IT – **Friedrich Rappard**

Our governance team

We have a rigorous internal governance architecture, which is facilitated through several governance committees that report to our board of directors. The various committees are set out in the diagram below:

Board of directors

Sub-committees of the board of directors

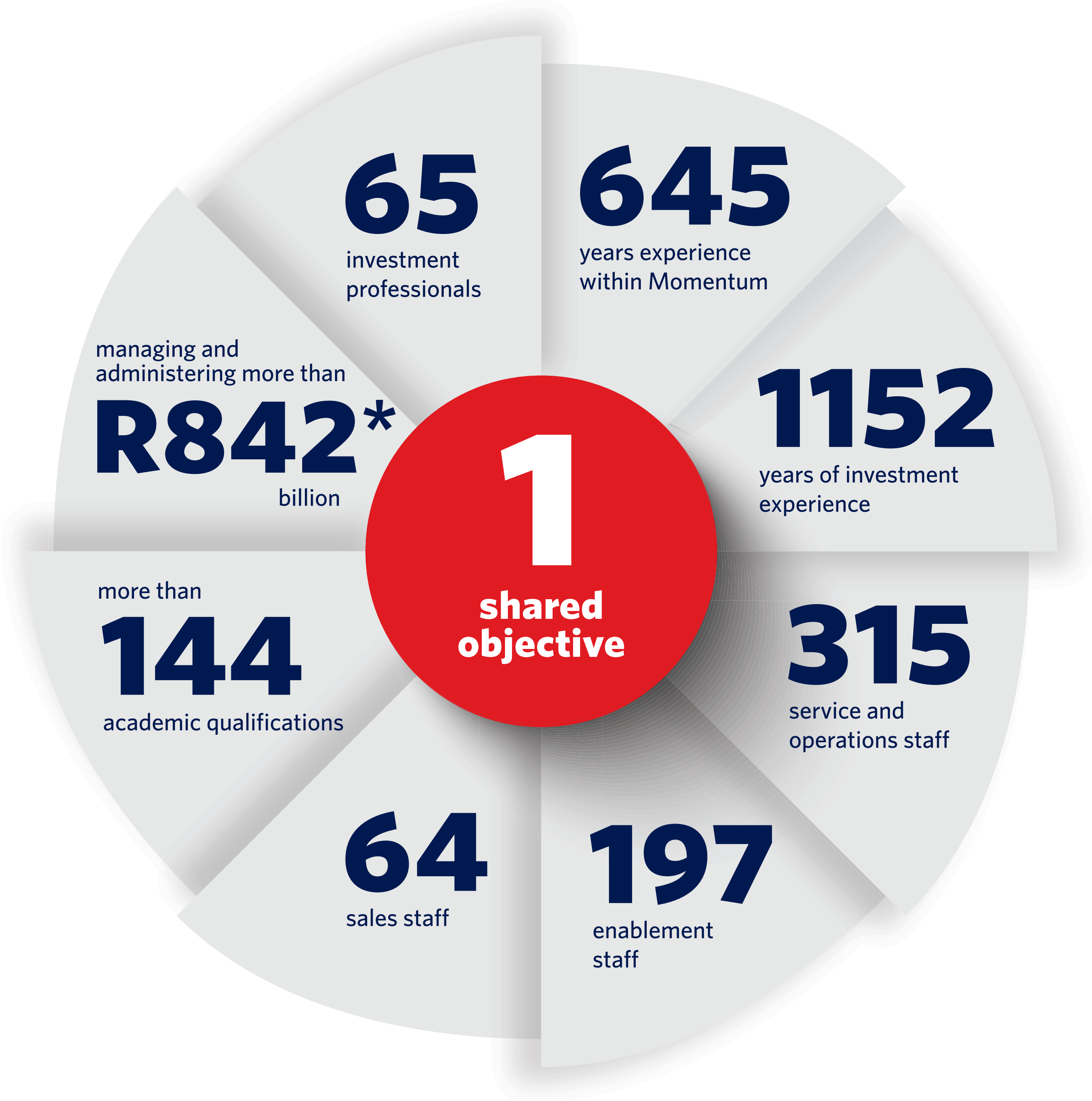
- **Audit panel**
- **Risk committee**
- **Executive committee**
- **Tax committee**
- **Compliance committee**
- **IT committee**

Head: Governance
Daleen Lessing

- Head of Risk **Elmien Werner**
- Head of Wealth and Retirement Fund Legal **Hettie Joubert**
- Head of Investment Compliance and Risk Attribution **Leander Snyman**
- Business Compliance Analyst **Bernard Pieterse**
- Momentum Consult Compliance **Jackie Drotsky**

Our track record

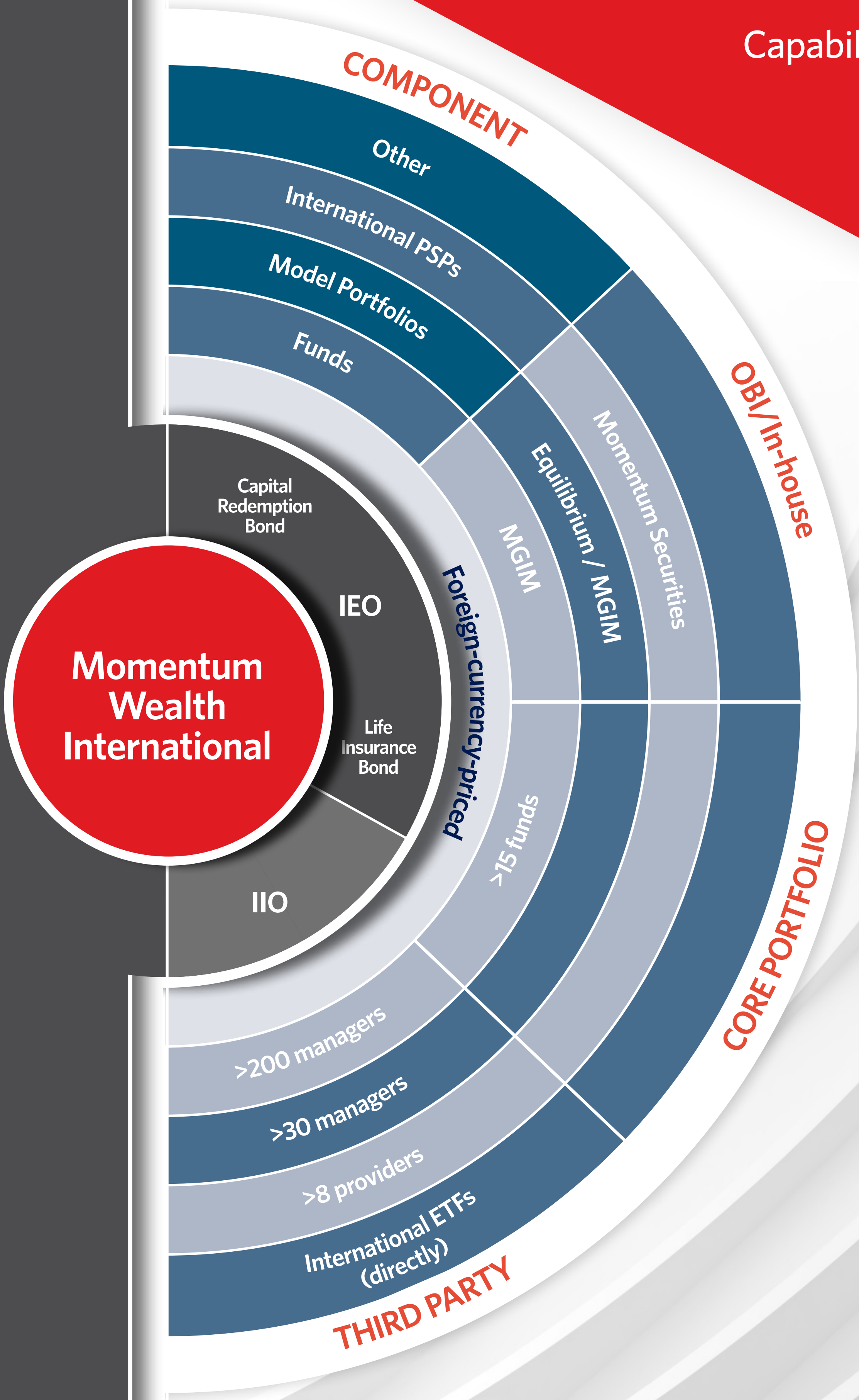
The investment team has earned their stripes:



*Note: *30 June 2023*

Momentum Wealth International

Capability overview



Abbreviations

IEO	International Endowment Option
IIO	International Investment Option
MGIM	Momentum Global Investment Management
PSP	Personal Share Portfolio

Contact us

Website: momentum.co.za/investments

Momentum Wealth International
Client service: 0860 444 433
Telephone: +27 (0)12 684 5008
Email: client.services@momentum.co.za

How we can help you

To find out more about our investing philosophy and our offerings, scan the QR code™ to visit our website, momentum.co.za/investments