

26 September 2023

## **Momentum Investments and Robeco launch partnership in Southern Africa**

### **Strategic partnership deepens portfolio integration in quantitative equity products and research**

Momentum Investments and Robeco have entered a strategic partnership, affording Momentum Investments access and exclusive distribution rights to Robeco's quantitative equity portfolios and research support for the Southern Africa Development Community region. The partnership also provides Momentum Investments with broad access to Robeco's best practices and insights.

As allocators of capital across the investment team in London and South Africa (SA), Momentum Investments has identified Robeco as core partner to deepen integration of its portfolios, deemed as a crucial investment success factor.

Robeco is an international asset manager founded in 1929 and a global leader in quantitative and sustainable investing since 1995. Quantitative or "quant" investing is an investing strategy that uses mathematical models and data analysis to make investment decisions and manage portfolios.

The partnership follows five years of collaboration between Momentum Investments and Robeco. With this partnership, Momentum Investments can seamlessly integrate its global portfolios by using Robeco quants as a core provider in global equity funds. This integration has been created through the alignment and harmonization of investment factors between SA and offshore equity and weighting schemes that take into account the complementary characteristics of various equity markets. Sustainability and responsible investing resonate deeply with Momentum Investments and Robeco, and Momentum Investments has systematically improved the environmental, social and governance (ESG) profile and carbon footprint of its global portfolios. Momentum Investments continue to progress on its sustainability journey and integrate the principles encapsulated in its policies on Responsible Investment, Climate Change, Engagement and Proxy Voting.

The continued relaxation of exchange control has increasingly required assets managed in SA and other markets to have a strong alignment and integration of the local and global components of portfolios, which also ensures the consistency and integrity of the investment philosophy and risk management. The strategic partnership with Robeco, together with



Momentum Investments' London office Momentum Global Investment Management, as well as SA based teams, will ensure that the company can continue to provide investors with world leading insights and access to global investment opportunities.

Mike Adsetts, Chief Investment Officer of Momentum Investments: "We are excited by the prospects afforded by the partnership and look forward to the ability to leverage the complementary skills of Momentum and Robeco to the benefit all our stakeholders."

Jeanette Marais, Chief Executive Officer of Momentum Metropolitan: "The synergy between Momentum and Robeco empowers us to deliver our clients unmatched, integrated portfolios spanning both local and global assets. In the dynamic South African investment landscape, change is upon us. As the need for offshore assets surges, our powerful partnership merges Robeco's global knowledge with our South African expertise. Together, we are shaping the future of world-class investing."

Wilma de Groot, Head of Quant Equity Portfolio Management of Robeco: "In the ever-evolving South African investment environment, our collaboration brings together Momentum Investments' understanding of the local landscape and Robeco's global expertise, especially in the field of quant investing."

Thabo Tembo, Head of Robeco Africa: "This is a mutually beneficial partnership which demonstrates the strong and long-standing relationship and collaboration between our two organisations. We are grateful for the partnership and commitment to develop our shared success in the region."

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## **About Momentum Investments**

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 have 77 investment professionals with more than 1 016 years of investment experience as well as R608 billion assets under management and administration. Our brand has a strong reputation for ethics, honesty, integrity, and transparency, as well as stability and governance. Momentum Metropolitan Holdings is our shareholder, affording us the stability



and strength of a listed company. The security of the Momentum Metropolitan Life Limited balance sheet offers protection that few others can. More information is available at [www.momentum.co.za](http://www.momentum.co.za).

### **About Robeco**

Robeco is a pure-play international asset manager founded in 1929 with headquarters in Rotterdam, the Netherlands, and 16 offices worldwide. A global leader in sustainable investing since 1995, its integration of sustainable as well as fundamental and quantitative research enables the company to offer institutional and private investors an extensive selection of active investment strategies, for a broad range of asset classes. As at 31 March 2023, Robeco had EUR 179 billion in assets under management, of which EUR 176 billion is committed to ESG integration. Robeco is a subsidiary of ORIX Corporation Europe NV. More information is available at [www.robeco.com](http://www.robeco.com).