

Why do we call it a personal share portfolio?





PERSONAL

momentum
securities

Self managed



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securities

Discretionary portfolios 





Self managed

Control
Transparency

Time +
Knowledge

momentum
securities

Managed portfolio

Professional expertise

Agility

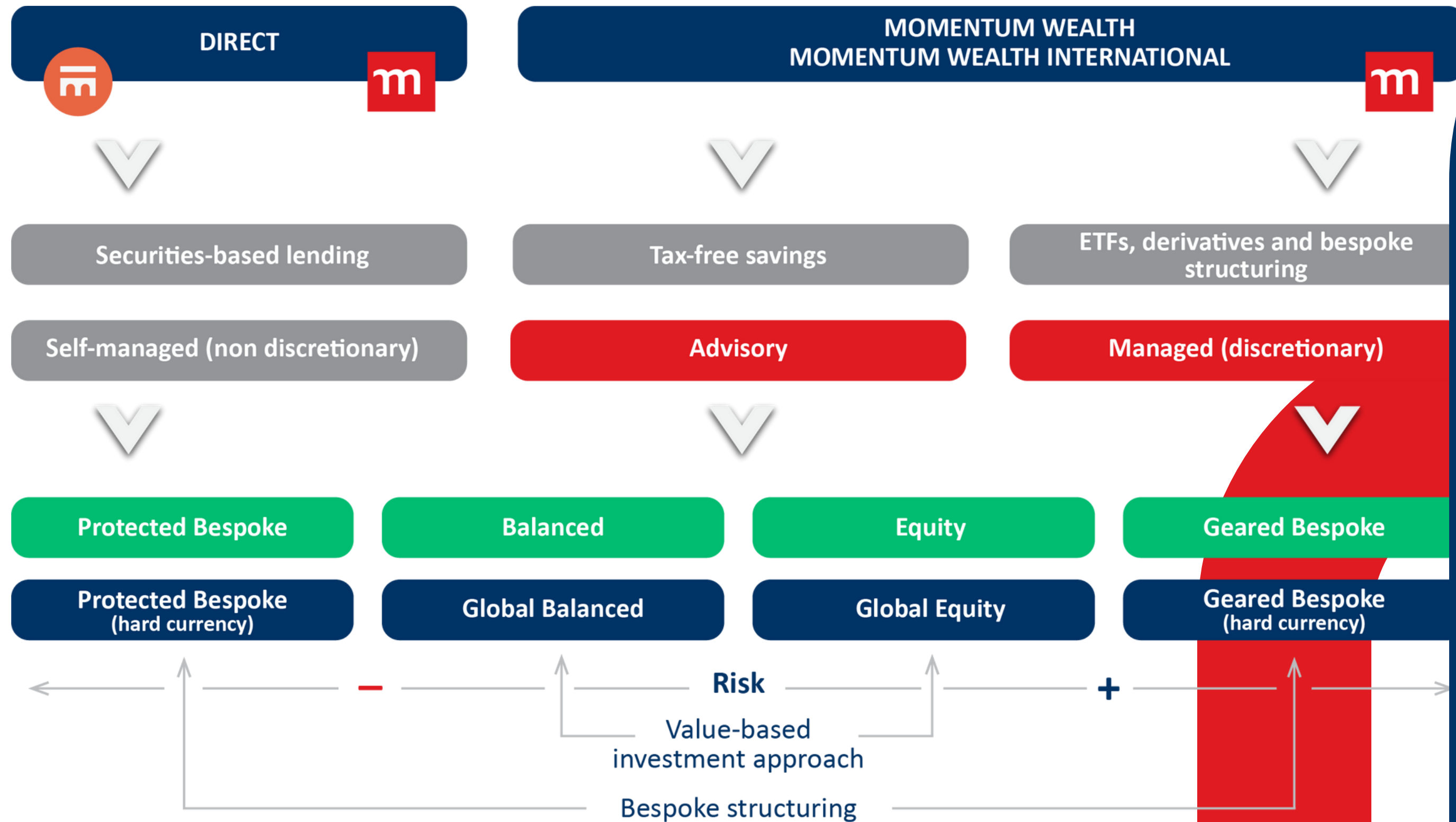
Outcome-focussed

momentum
securities



Momentum Securities product offering

Catering for the full spectrum of client and intermediary needs



Who's in the driver's seat?

Self managed = client

Managed = professional driver

The background of the slide is a photograph of several star-shaped cookies on a grey surface dusted with white powdered sugar. The cookies are decorated with white icing borders and various symbols: some have red dollar signs, some have pink dollar signs, and one has the word 'LOWE' in white icing. A red curved shape is visible in the top left corner.

No such thing as an average client



Owning real shares, not just units

Every share = story of a business



EXTINCT



m

The science of genetics. The business of discovery.

RS OLD

+

momentum
securities

COVID-19[®]

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MEET THE WOOLLY MAMMOTH.

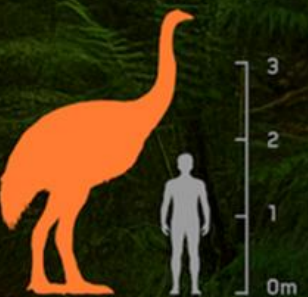
DE-EXTINCTION OF THE
WOOLLY MAMMOTH

De-extinction of the Woolly Mammoth
how exactly are we getting there?

HUNTED TO ZERO^m

| THYLACINE EXTINCT SINCE 1936

The story of the thylacine's disappearance is
sadly one of human aggression. Colossal is
working to right this wrong and bring this
marvel of evolution back to life.







A large, circular, frosted glass sign with a silver-colored metal rim is mounted on a dark, rectangular base. The sign features the word "theranos" in a dark blue, sans-serif font. The letter "o" is replaced by a teal-colored circle with a horizontal gradient. The sign is set against a background of a modern glass-walled building, lush green trees, and tall grass under a clear blue sky.

theranos

Bloomberg Businessweek

December 14 — December 20, 2015 | bloomberg.com



**Theranos CEO
Elizabeth Holmes
fights back**
p44

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Moral of the story

Portfolio manager

Adviser

Client



PSP integrates with inheritance and legacy

Why it matters now

Personalisation vs commoditisation

momentum
securities

More than a name, it's a philosophy



Thank you

