

**wealth** investments

a holistic investment offering

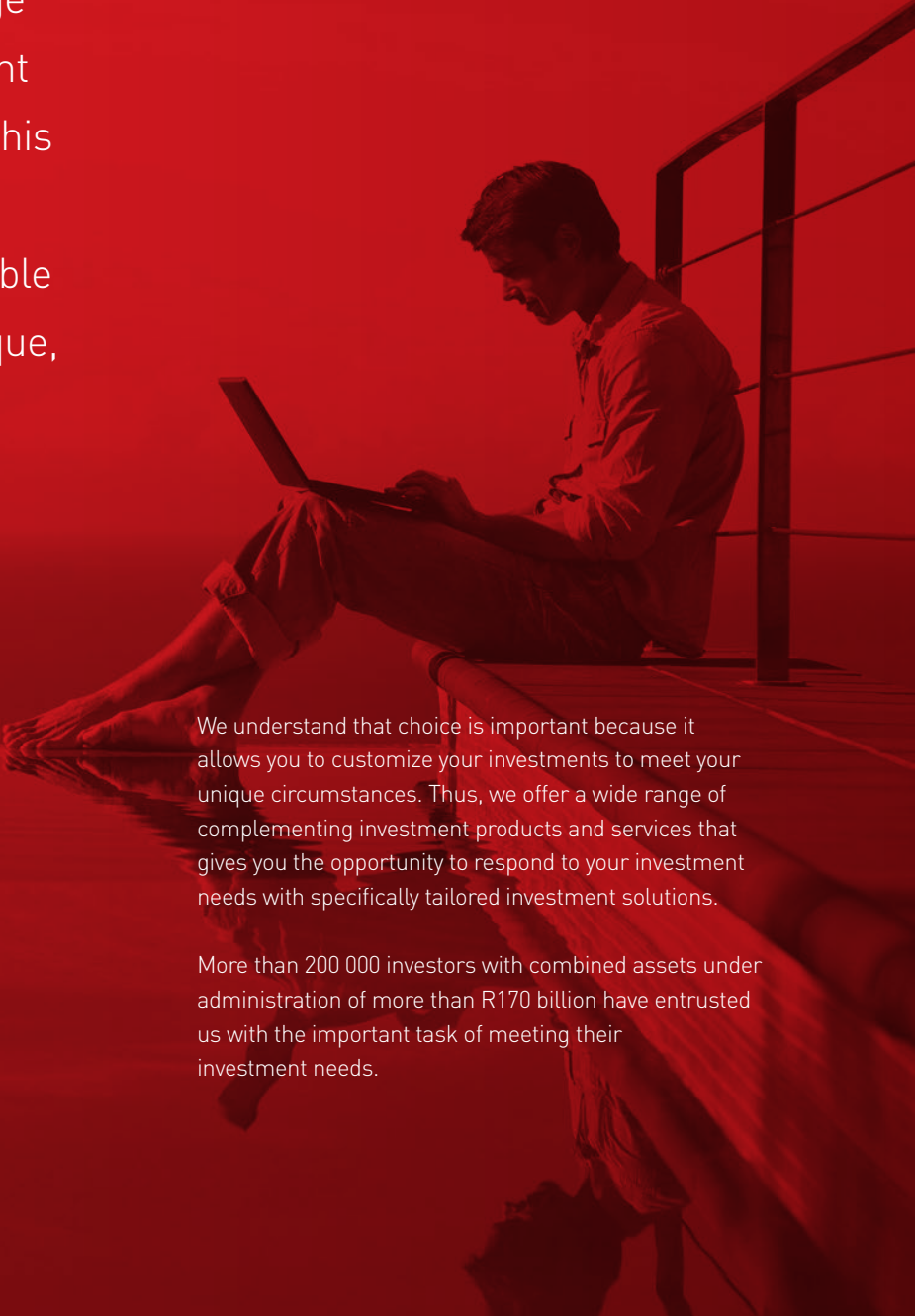


*The strongest principle of  
preserving wealth, lies in human choice*



# a holistic investment offering

We realise that your investment needs are unique and change as you move through different stages of your lives. It is on this basis that we have built our value proposition on being able to meet your needs in a unique, comprehensive and innovative way.

A man in a light-colored shirt and dark trousers is sitting on a wooden ledge, looking down at a laptop computer. The scene is reflected in the water below, creating a symmetrical image. The background is a soft, hazy landscape with a railing visible behind the man.

We understand that choice is important because it allows you to customize your investments to meet your unique circumstances. Thus, we offer a wide range of complementing investment products and services that gives you the opportunity to respond to your investment needs with specifically tailored investment solutions.

More than 200 000 investors with combined assets under administration of more than R170 billion have entrusted us with the important task of meeting their investment needs.

### A diverse range of investment products and services

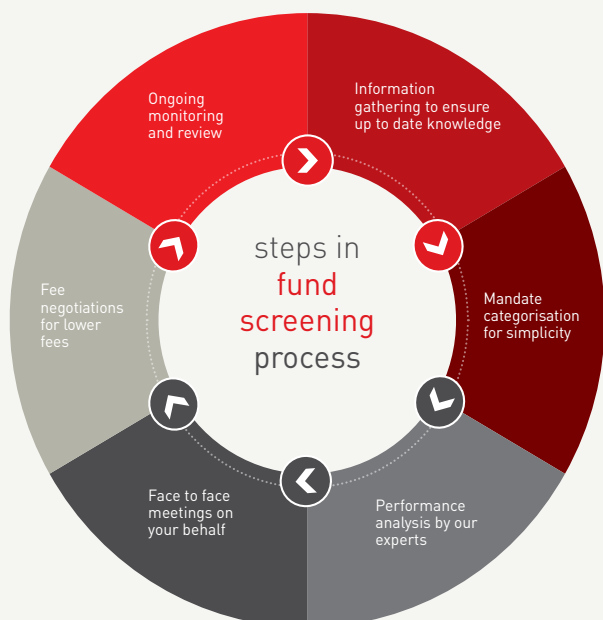
We offer investment and retirement solutions that you can access with a regular or lump-sum investment amount with exposure to both local and international investment markets. You are able to invest in investment components which you may not be able to access on your own – this includes alternative dealing funds, personal share portfolios, protected investments, and private equity funds. In addition, we offer portfolio management and fiduciary services that you can use to maximize your investment return potential and protect your wealth.

This diverse range of investment products and services makes us the investment provider of choice for pre- and post-retirement solutions, including capital growth, wealth preservation and income generation.

Our new smart pricing model ensures you receive value for money – you only pay for what you want thus ensuring that you get the most out of our offering.

### Guided choice

Being focused on meeting the needs of investors means you need to offer choice. At the same time, we believe it is important that we assist you to make the best decisions. This is why we provide guided architecture with the necessary supporting documentation that will inform you why certain investment components are worth considering for investment purposes.



## Our diverse range of investment products and services makes us the investment provider of choice

### My Savings Portfolio

My Savings Portfolio™ is an all-in-one savings solution designed to cater for your various savings needs - whether you are saving for your retirement, saving for your child's education, saving for something special, or that 'rainy day'.

### International

Our international investments solutions were designed to meet all your international investment needs either through our locally based platform or our international platform. We offer international rand denominated and foreign currency investments in local currency (ZAR) and offshore currencies - USD, EUR, GBP, CHF, JPY, AUD, and HKD. In addition we have scoured the international investable universe to bring you guided architecture as we have on the local platform. You can thus rest assured that our Core Portfolio lists will allow you access to investments and assist you in making the best decisions.

### Wealth Portfolio Management

Our share portfolio service is a tailored portfolio of securities. You can determine your degree of participation from full manager discretion to execution only. Wealth Portfolio Management offers competitive fees and faster processing.

### Fiduciary Services

We offer fiduciary services through Momentum Fiduciary Services. This team of highly skilled fiduciary and tax specialists offers a full range of professional and innovative services that are integrated into the financial planning process and aligned to your needs. It is not only about investment returns, we also assist you with protecting what you have worked so hard to achieve.

## Momentum Wealth and other contact details

If you have any questions or require more information, please contact us by using the following details:

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