

QUARTERLY

momentum

Securities

Global ETF Portfolio - Multiple September 2017

Investment objective

This is a global diversification portfolio aimed at a long-term sustainable capital growth, with a limited element of capital protection. Investors are placed in an S&P 500 index tracker fund which exposes the investor to a broad range of large cap US listed companies, and allows the investor to diversify internationally and seek long-term growth. The investor is also exposed to the MSCI Europe ETF which offers exposure to a broad range of large, medium and small cap stocks within the developed market countries within Europe. There is further exposure to the MSCI Pacific ETF which offers the investor comprehensive access to large, medium and small cap stocks in Australia, Hong Kong, Japan, New Zealand and Singapore.

Investment profile

For entry-level investors seeking international exposure
Investors who have a longer investment term (in excess of 5 years)
Value-based investors with a high-risk tolerance, seeking an internationally diversified managed portfolio
Main objective: Capital growth
Investors comfortable with inherent volatility of equities, as well as the volatility of international currencies

Risk profile

- Low
- Low-Medium
- Medium
- Medium-High
- High

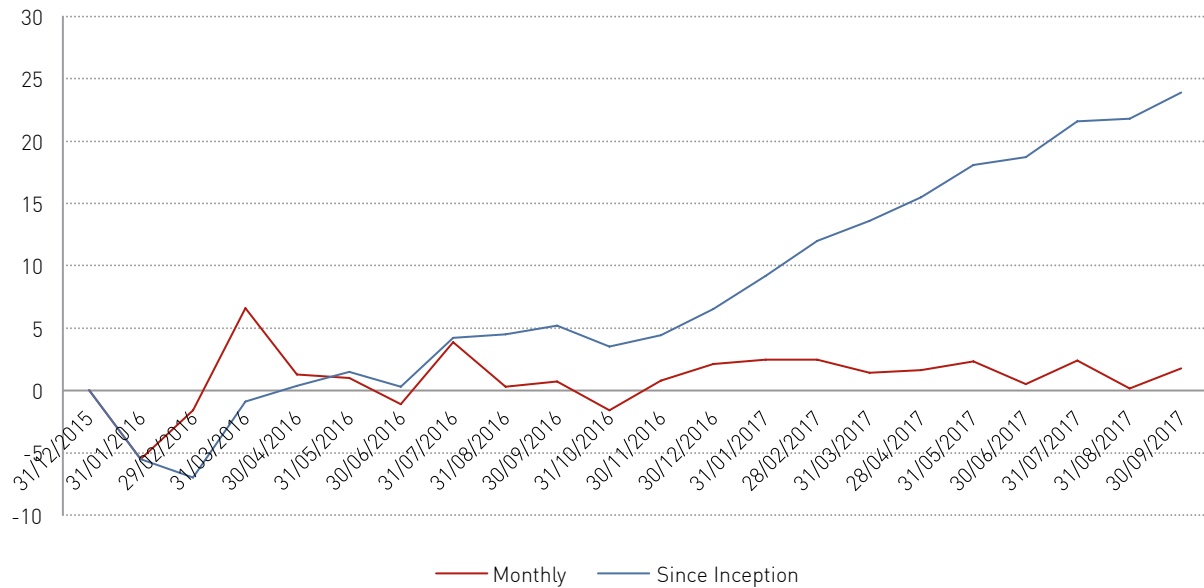
Portfolio information

Inception date	1 January 2016
Investment manager	Momentum Securities
Administrator/custodian	Momentum Securities
Administration fee	0.5% (annual)
Minimum lump sum	\$ 80 000
Redemption periods	3 business days
Benchmark	MSCI World Index

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Performance



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