



Global ETF Portfolio – Multiple - Quarterly

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.

June 2018

Risk profile



HIGH

Portfolio information

Inception date

1 June 2015

Benchmark average

MSCI World Index

Investment manager

Momentum Securities

Stockbroker/custodian

Momentum Securities

Administration fee

0.5% (annual)

Minimum lump sum

\$ 20 000

Redemption periods

5 business days

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Cumulative Performance

