

Global ETF Portfolio

April 2016

Investment objective

This is a global diversification portfolio aimed at long-term sustainable capital growth, with a limited element of capital protection. Investors are placed in the MSCI World Index tracker fund which exposes the investor to a broad range of developed market companies around the world, and allows the investor to diversify internationally and seek long-term growth.

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 June 2015
Benchmark average	MSCI World Index
Investment manager	Momentum SP Reid Securities
Administrator/custodian	Momentum SP Reid Securities
Administration fee	0.5% (annual)
Minimum lump sum	\$ 3 000
Redemption period	5 business days

Performance



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