

Global ETF Portfolio - Quarterly

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.



September 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

Cumulative Performance

