

Global ETF Portfolio

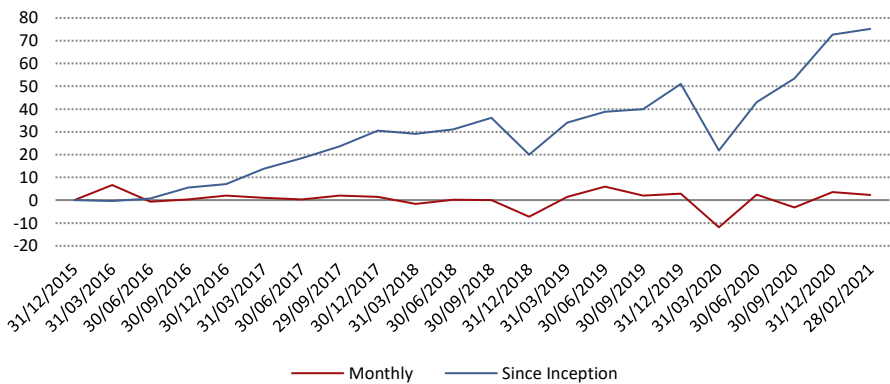
Investment Objective

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.

Cumulative Performance



February 2021

Risk profile



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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