momentum
securities

Offshore Investments

Should you wish to improve the geographical diversification of your investments we will buy and sell securities on your behalf, taking your offshore investment objectives and risk profile into consideration. This is done by making use of one of our core offshore investment portfolios through direct investments or via our institutional investment facility. Alternatively, if you have specific objectives, a bespoke portfolio will be designed to meet your requirements.

While some listed Exchange Trade Funds (ETFs) offer offshore exposure, you may prefer personalised segregated investment portfolios. Our range of offshore providers lets you select the solution that best meets your particular requirements, with access to all major global equity markets, ETFs and mutual funds.

Offshore Non-discretionary (self-managed) Portfolios

If you want to participate in the management of your offshore investments, we let you take the reins. We are always available to execute your transactions or to discuss investment opportunities (minimum $1 000).

Offshore Discretionary (managed) Portfolios

We will buy and sell securities on your behalf, taking your investment objectives and risk profile into consideration.

Global ETF Portfolio (minimum $20 000)

This is a global diversification portfolio aimed at long-term sustainable capital growth. 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.

Global ETF Portfolio Multiple (minimum $20 000)

This is a global diversification portfolio aimed at long-term sustainable capital growth. 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.

International Direct Share Portfolio (Minimum $80 000)

This is a high conviction international portfolio focused on maximising risk adjusted returns to the investors over the medium to long-term by investing in global listed equities. The returns of this portfolio are based on the ability of world equity markets indices to deliver returns in excess of inflation and the ability of the portfolio manager and our research team to identify and take positions in undervalued securities.

Asset Swap

Asset swaps are an effortless way to diversify offshore. There are no limits to the amount that can be invested offshore and the submission does not require SARB approval. Utilising this vehicle, affords you the opportunity to invest globally, without physically moving funds offshore. Monthly contributions are allowed. The investments must be repatriated to South Africa. Asset swaps are available via our offshore service provider, Swissquote.

Offshore Service Provider

Momentum Securities' relationship with our offshore provider Swissquote, offers you the ability to utilise their offshore platforms via your local portfolio manager relationship.

The Swissquote Group is Switzerland's leading provider of online financial and trading services. Listed on the Swiss Market Exchange since 29 May 2000, the Swissquote Group has its headquarters in Gland VD (Switzerland) and offices in Zürich, Bern, Dubai, Malta, London and Hong Kong.

An account via Momentum Securities will gain you access and provide you with the opportunity to act on financial information in the following exchanges: SIX Swiss Exchange; North America (USA and Canada); USA: CME and ISE; Europe (UK, Austria, Germany, Italy, Scandinavia); Euronext; Eurex; Euwax.

For more information, please contact your portfolio manager, or our Client Services team on 011 550 6270.

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