



# 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



April 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

Disclaimer: Shares are generally medium- to long-term investments. The value of shares may go down as well as up and past performance is not necessarily a guide to the future.

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