



OLDMUTUAL

OLD MUTUAL INTERNATIONAL INVESTMENT PORTFOLIO+ (IP+)

MODEL PORTFOLIO LIST

SEPTEMBER 2023



INTERNATIONAL



Old Mutual International (OMI)
offers access to leading Global
Model Portfolios as part of the
Investment Portfolio+ (IP+)

MODEL PORTFOLIOS AVAILABLE ON INVESTMENT PORTFOLIO+ (IP+):

ADVICEWORX	
IMS Code	Model Portfolio Name
9900196	AdviceWorx Global Balanced
9900197	AdviceWorx Global Equity

AMITY INVESTMENT SOLUTIONS	
IMS Code	Model Portfolio Name
9900241	Amity Global Growth
9900242	Amity Global Balanced

2IP INDEPENDENT INVESTMENT PARTNERS	
IMS Code	Model Portfolio Name
9900230	Global Balanced High Equity Solution

MAGWITCH	
IMS Code	Model Portfolio Name
9900206	Magwitch EUR Moderate Index Portfolio
9900204	Magwitch GBP Cautious Index Portfolio
9900205	Magwitch GBP Growth Index Portfolio
9900207	Magwitch GBP Moderate Index Portfolio
9900202	Magwitch USD Cautious Index Portfolio
9900203	Magwitch USD Growth Index Portfolio
9900208	Magwitch USD Moderate Index Portfolio

MORNINGSTAR	
IMS Code	Model Portfolio Name
9900212	Morningstar Global Balanced
9900211	Morningstar Global Cautious
9900213	Morningstar Global Growth

MULTIVEST	
IMS Code	Model Portfolio Name
9900198	Multivest Global Managed

NAVIGA	
IMS Code	Model Portfolio Name
9900200	Naviga Global Balanced Portfolio
9900239	Naviga Global Cautious (USD)
9900201	Naviga Global Equity

NFB	
IMS Code	Model Portfolio Name
9900209	NFB Global Balanced USD
9900210	NFB Global Equity USD

OLD MUTUAL TAILORED FUND PORTFOLIOS	
IMS Code	Model Portfolio Name
9900228	Tailored Fund Portfolios Active Global Balanced Portfolio
9900227	Tailored Fund Portfolios Active Global Cautious Portfolio
9900229	Tailored Fund Portfolios Active Global Equity Portfolio
9900194	Tailored Fund Portfolios Balanced Portfolio
9900193	Tailored Fund Portfolios Conservative Portfolio
9900195	Tailored Fund Portfolios Maximum Return Portfolio

PORTFOLIO ANALYTICS	
IMS Code	Model Portfolio Name
9900237	Analytics Global Balanced
9900238	Analytics Global Growth

PORTFOLIOMETRIX	
IMS Code	Model Portfolio Name
9900222	PortfolioMetrix UCITS - GPS Profile 3 (GBP)
9900223	PortfolioMetrix UCITS - GPS Profile 3 (USD)
9900218	PortfolioMetrix UCITS - GPS Profile 4 (GBP)
9900214	PortfolioMetrix UCITS - GPS Profile 4 (USD)
9900219	PortfolioMetrix UCITS - GPS Profile 5 (GBP)
9900215	PortfolioMetrix UCITS - GPS Profile 5 (USD)
9900220	PortfolioMetrix UCITS - GPS Profile 6 (GBP)
9900216	PortfolioMetrix UCITS - GPS Profile 6 (USD)
9900221	PortfolioMetrix UCITS - GPS Profile 7 (GBP)
9900217	PortfolioMetrix UCITS - GPS Profile 7 (USD)

WEALTH MANAGER	
IMS Code	Model Portfolio Name
9900232	Wealth Manager International Moderate Aggressive

Note: In order to invest in any of the above models, the client will need to sign a mandate with the Model Manager.

MODEL MANAGERS

Old Mutual International partners with a wide range of Model Managers who work closely with Financial Advisers and Old Mutual International to provide clients with model portfolio solutions. Below are some of the Model Managers we are currently supporting on our platform and their contact details:

ADVICEWORX

<https://adviceworx.co.za/>

E: service@adviceworx.co.za

AMITY INVESTMENT SOLUTIONS

<https://amity.co.za/>

E: info@amity.co.za

2IP INDEPENDENT INVESTMENT PARTNERS

<https://www.2ip.co.za/>

E: info@2ip.co.za

MAGWITCH

<https://www.magwitchoffshore.co.za>

E: offshore@magwitch.co.za

MORNINGSTAR

<https://www.morningstar.com/en-za/products/morningstar-managed-portfolios>

E: SAManagedPortfolios@morningstar.com

MULTIVEST ASSET MANAGEMENT

<https://www.multivest.co.za/>

E: info@multivest.co.za

NAVIGA

<https://www.naviga.co.za>

E: info@naviga.co.za

NFB

<https://www.nfb.co.za/strategies/asset-management>

E: amjhb@nfb.co.za

TAILORED FUND PORTFOLIOS

<https://www.oldmutual.co.za/wealth/solutions/tailored-fund-portfolios>

E: tfp@omwealth.co.za

PORTFOLIO ANALYTICS

<https://www.analytics.co.za/>

E: dfm@analytics.co.za

PORTFOLIOMETRIX

<https://www.portfoliometrix.com/en-za>

E: infoSA@portfoliometrix.com

WEALTH MANAGER

<https://wealthmanager.co.za/>

E: candice@wealthmanager.co.za

www.omi-int.com

Old Mutual Isle of Man Branch of Old Mutual Life Assurance Company (South Africa) Limited, is registered in the Isle of Man under number 005664F and whose principal place of business is 5A Village Walk, Onchan, Isle of Man, IM3 4EA, British Isles.

Permitted to carry on long-term insurance business in and from the Isle of Man by the Isle of Man Financial Services Authority.

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