

OLDMUTUAL


OLD MUTUAL INTERNATIONAL INVESTMENT PORTFOLIO+ (IP+)

MODEL PORTFOLIO LIST

JULY 2024



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+):

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

PWM WEALTH MANAGEMENT

IMS Code	Model Portfolio Name
9900261	PWM Global Equity Portfolio (USD)
9900262	PWM Global Balanced Portfolio (USD)
9900263	PWM Global Diversified Income (USD)

ADVICEWORX

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

2IP INDEPENDENT INVESTMENT PARTNERS

IMS Code	Model Portfolio Name
9900230	Global Balanced High Equity Solution

AMITY INVESTMENT SOLUTIONS

IMS Code	Model Portfolio Name
9900241	Amity Global Growth
9900242	Amity Global Balanced

FUNDHOUSE INVESTMENT ADVISORS

IMS Code	Model Portfolio Name
9900258	Fundhouse Global Equity

INDEPENDENT INVESTMENT SOLUTIONS

IMS Code	Model Portfolio Name
9900247	NN8 Invest Global Cautious
9900248	INN8 Invest Global Balanced
9900249	INN8 Invest Global Equity

INN8 INVEST

IMS Code	Model Portfolio Name
9900255 I ²	Global Cautious Select
9900256 I ²	Global Moderate Select
9900257 I ²	Global Growth Select

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

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)

SEED INVESTMENTS	
IMS Code	Model Portfolio Name
9900244	Hampshire Global Balanced Solution
9900245	Hampshire Global High Growth Solution

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:

TAILORED FUND PORTFOLIOS

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

PWM WEALTH MANAGEMENT

<https://www.privatewealth.co.za/> E: pwm@privatewealth.co.za

ADVICEWORX

<https://adviceworx.co.za/> E: service@adviceworx.co.za

2IP INDEPENDENT INVESTMENT PARTNERS

<https://www.2ip.co.za/> E: info@2ip.co.za

AMITY INVESTMENT SOLUTIONS

<https://amity.co.za/> E: info@amity.co.za

FUNDHOUSE INVESTMENT

<https://www.fundhouse.co.za/> E: info@fundhouse.co.za

INDEPENDENT INVESTMENT SOLUTIONS

<https://i2solutions.co.za/> E: info@i2solutions.co.za

INN8 INVEST

<https://inn8.co.za/> E: inn8invest@inn8.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

PORTFOLIO ANALYTICS

<https://www.analytics.co.za/> E: dfm@analytics.co.za

PORTFOLIOMETRIX

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

SEED INVESTMENTS

<https://www.seedinvestments.co.za/> E: info@seedinvestments.co.za

WEALTH MANAGER

<https://wealthmanager.co.za/> E: candice@wealthmanager.co.za

www.omi-int.com

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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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