INTERNATIONAL



OLD MUTUAL INTERNATIONAL INVESTMENT PORTFOLIO+ | INVESTMENT PORTFOLIO+ ASSURED

MODEL PORTFOLIO LIST

INSURE I BANK I **INVEST**



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

MODEL PORTFOLIOS AVAILABLE ON **INVESTMENT PORTFOLIO+ | INVESTMENT PORTFOLIO+ ASSURED:**

SYMMETRY	
Code	**Model Portfolio Name**
9900193	Symmetry Offshore Cautious Growth Model Portfolio (USD)
9900194	Symmetry Offshore Moderate Growth Model Portfolio (USD)
9900195	Symmetry Offshore Global Equity Model Portfolio (USD)
9900227	ymmetry Active Offshore Cautious Growth Model Portfolio (USD)
9900228	Symmetry Active Offshore Moderate Growth Model Portfolio (USD)
9900229	Symmetry Active Offshore Global Equity Model Portfolio (USD)
9900297	YG1 Global Equity Portfolio (USD)

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

PWM WEALTH MANAGEMENT	
Code	**Model Portfolio Name**
9900261	PWM Global Equity Portfolio
9900262	PWM Global Balanced Portfolio
9900263	PWM Global Diversified Income Portfolio

AFRAFIN	
Code	**Model Portfolio Name**
9900296	Afrafin

AMITY INVESTMENT SOLUTIONS	
Code	**Model Portfolio Name**
9900241	Amity Global Growth

ACCORN INVESTMENT MANAGEMENT	
Code	**Model Portfolio Name**
9900284	Warwick International Flexible
9900285	Warwick International Balanced

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

INDEPENDENT INVESTMENT SOLUTIONS	
Code	**Model Portfolio Name**
9900255	I² Global Cautious Select
9900256	I² Global Moderate Select
9900257	I² Global Growth Select
9900281	Fortunate Global Equity Solution

INN8 INVEST	
Code	**Model Portfolio Name**
9900247	INN8 Invest Global Cautious
9900248	INN8 Invest Global Balanced
9900249	INN8 Invest Global Equity

MAGWITCH	
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
9900250	Magwitch USD Equity Index Portfolio
9900202	Magwitch USD Cautious Index Portfolio
9900203	Magwitch USD Growth Index Portfolio
9900208	Magwitch USD Moderate Index Portfolio

MANAGED INVESTMENT STRATEGIES (MIS)	
Code	**Model Portfolio Name**
9900307	MIS Global Balanced (USD)
9900308	MIS Global Flexible (USD)
99900317	MIS Global Cautious (USD)

MITONOPTIMAL SOUTH AFRICA (PTY) LTD	
Code	**Model Portfolio Name**
9900325	MitonOptimal Sarasin USD Balanced
9900326	MitonOptimal Sarasin GBP Balanced
9900301	Sir Group Global Balanced
9900302	Sir Group Global Assertive
9900303	MitonOptimal Core USD Growth
9900304	MitonOptimal Core USD Balanced

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

MULTIVEST	
Code	**Model Portfolio Name**
9900198	Multivest Global Managed (USD)

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

NESHER MANAGEMENT SERVICES	
Code	**Model Portfolio Name**
9900309	NMS Global Managed (USD)

OPTIMUM INVESTMENT GROUP	
Code	**Model Portfolio Name**
9900315	OIG Global Cautious Solution
9900313	OIG Global Growth Solution
9900314	OIG Global Moderate Solution

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

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

SOUTHERN CHARTER FUND MANAGERS	
Code	**Model Portfolio Name**
9900280	SCFM - Global Balanced Portfolio

STRATEGIQ CAPITAL	
Code	**Model Portfolio Name**
9900288	Strategiq Global Cautious Solution
9900289	Strategiq Global Balanced Solution
9900290	Strategiq Global Growth Solution
9900305	Strategiq Global Balanced Passion Solution
9900306	Strategiq Global Cautious Passion Solution

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

WEALTHSTRAT	
Code	**Model Portfolio Name**
9900277	WealthStrat Global Cautious
9900278	WealthStrat Global Balanced
9900279	WealthStrat Global Growth
9900311	WealthStrat Global Core Strategy
9900312	WealthStrat Global Equity Strategy

WEAVER INVESTMENT MANAGEMENT	
Code	**Model Portfolio Name**
9900292	Investwell Global Moderate
9900293	Weaver Global Aggressive
9900294	Weaver Global Conservative
9900295	Weaver Global Moderate

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 Model Managers we are currently supporting on our platform and their contact details:

SYMMETRY
https://symmetry.co.za/about-us/discretionary-fund-management
E: dfm@symmetry.co.za

PWM WEALTH MANAGEMENT
https://www.privatewealth.co.za/
E: pwm@privatewealth.co.za

ACCORN INVESTMENT MANAGEMENT
https://accorn.com/
E: adrian.meager@orionim.biz

ADVICEWORX
https://adviceworx.co.za/
E: service@adviceworx.co.za

2IP INDEPENDENT INVESTMENT PARTNERS
https://www.2ip.co.za/
E: info@2ip.co.za

EFFICIENT NAVIGA
https://www.naviga.co.za
E: info@naviga.co.za

AMITY INVESTMENT SOLUTIONS
https://amity.co.za/
E: info@amity.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

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

SOUTHERN CHARTER FUND MANAGERS
https://www.southerncharter.co.za/
E: info@southerncharter.co.za

STRATEGIQ CAPITAL
https://www.strategiq.co.za/
E: info@strategiq.co.za

WEALTH MANAGER
https://wealthmanager.co.za/
E: candice@wealthmanager.co.za

WEALTHSTRAT
https://wealthstrat.co.za/
E: info@wealthstrat.co.za

AFRAFIN
https://www.afrafin.co.za/

OPTIMUM INVESTMENT GROUP
https://oig-invest.com/
E: info@oig-invest.com

NESHER MANAGEMENT SERVICES
https://nesherinvest.co.za/home
E: info@nesherinvest.co.za

WEAVER INVESTMENT MANAGEMENT
https://www.weaverinvest.co.za/
E: info@www.weaverinvest.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.

Old Mutual Life Assurance Company (South Africa) Limited is incorporated in South Africa (registration number: 1999/04643/06). Registered office: Mutualpark, Jan Smuts Drive, Pinelands, Cape Town, South Africa. Old Mutual Life Assurance Company (South Africa) A licensed FSP and Life Insurer.

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