


MEASURED ENTITY

Company Name	Momentum Group Limited (includes entities listed in Annexure A-B)
Trade Name	Momentum Group Limited
Location	268 West Avenue Centurion 0157
Registration Number	2000/031756/06
VAT Number	N/A
SDL Number	L900712631
Certificate Number	MGL010304-REV8

B-BBEE SCORE PER ELEMENT

Equity Ownership	26,00
Management Control	13,12
Skills Development	15,37
Procurement Enterprise & Supplier Development	31,33
Socio-Economic Development & Consumer Education	6,46
Empowerment Financing	13,27
Access to Financial Services	9,13
Additional Y.E.S points	0,00
Total Score	114,67
Converted score (for information purposes only)	106,07

B-BBEE STATUS

Final B-BBEE Status	Level One Contributor	
Final B-BBEE Recognition Level	135%	
Empowering Supplier	Yes	
Discounting Principle Applied to final level	No	
Participation in Y.E.S and tier achieved	N/A	
Achieve YES Target and 2.5% Absorption	No	
Achieve 1.5 x YES Target and 5% Absorption	No	
Achieve Double YES Target and 5% Absorption	No	
Level & Points from Y.E.S. Initiative	No additional levels or points	
Exclusion Principle applied to Ownership	No	
Modified Flow-Through Principle Applied	No	
Ownership Recognition	Flow-Through	Modified Flow-Through
Black Ownership	27,59%	N/A
Black Female Ownership	14,25%	N/A
Voting Rights of Black People	38,13%	N/A
Voting Rights of Black Women	20,30%	N/A
Economic Interest of Black People	27,59%	N/A
Economic Interest of Black Women	14,25%	N/A
51% Black Owned	No	
30% Black Women Owned	No	
51% Black Designated Group Supplier	No	
Total Black Designated Groups	8,53%	
Black Youth	7,33%	
Black Disabled People	0,03%	
Black Unemployed People	0,16%	
Black People living in rural/under-developed areas	0,32%	
Black Military Veterans	0,00%	
Measurement Period	Financial Year Ended 30 June 2024	
Applicable Scorecard	Amended Financial Sector Generic Scorecard: Long-Term Assurers	
Applicable BEE Code	Gazetted Codes 41287	
Date of Issue	22 October 2024	
Date of Re-issue	N/A	
Expiry Date	21 October 2025	

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B-BBEE Verified Company

William Smith

 William Smith
 Technical Signatory


ANNEXURE A

Subsidiary / Division / Entity	Registration	VAT Number
102 Rivonia Road Proprietary Limited	2012/028041/07	4450260866
129 Rivonia Road Proprietary Limited	1987/005838/07	4640111037
Adapt Office Suits Proprietary Limited	2020/879592/07	N/A
Allens Nek PFS (Pty) Ltd	2021/443064/07	4350296374
Amandla Renewable Energy Fund (RF) Proprietary Limited	2019/569240/07	N/A
Anrobrite Proprietary Limited	2019/040768/07	N/A
BDC Property Partners Proprietary Limited	2023/189150/07	N/A
Chuma Mall Proprietary Limited	2016/121951/07	4950282303
Curate Investments (Pty) Ltd	2023/747232/07	N/A
Equilibrium Investment Management Proprietary Limited	2007/018275/07	4830250959
ERIS Property Group Proprietary Limited	2008/006570/07	4860247198
Gamaphuteng Enterprises Proprietary Limited	1979/002098/07	4920110089
Guardrisk Allied Products & Services Proprietary Limited	2007/016202/07	4150240036
Guardrisk Group Proprietary Limited	2013/136269/07	N/A
Guardrisk Insurance Company Limited	1992/001639/06	4250138072
Guardrisk Life Limited	1999/013922/06	N/A
Guardrisk Microinsurance Limited	1991/005238/06	4030125084
Guardrisk Premium Finance Proprietary Limited	1987/005104/07	N/A
Kemparkto Proprietary Limited	1966/011288/07	N/A
Landplan Beleggings Proprietary Limited	1982/011746/07	N/A
Metropolitan Capital Proprietary Limited	2006/020007/07	4410249520
Metropolitan Franchise Proprietary Limited	2007/018501/07	4220240032
Metropolitan Health Corporate Proprietary Limited	1999/027531/07	4900186323
Metropolitan International Holdings Proprietary Limited	2012/071065/07	N/A
Metropolitan International Support Proprietary Limited	1998/019812/07	4490236066
MMH Rosslyn Development (Pty) Ltd	2022/537652/07	4330307523
MMI Short Term Insurance Administration Proprietary Ltd	1968/013691/07	4030264693
Momentum Alternative Investments Proprietary Limited	2007/004246/07	4920241892
Momentum Asset Management Nominees Proprietary Limited	1999/000360/07	N/A
Momentum Asset Management Proprietary Limited	1987/004655/07	4200149096
Momentum Collective Investments (RF) Proprietary Ltd	1987/004287/07	4870151091
Momentum Consult Proprietary Limited	1969/009289/07	4040147821
Momentum Consultants and Actuaries Proprietary Limited	2002/027693/07	4590206324
Momentum Health Solutions Proprietary Limited	1969/016884/07	4450161726
Momentum Healthcare Distribution Proprietary Limited	1998/015178/07	4920215318
Momentum Insure Company Limited	2005/026378/06	4640221745
Momentum Investments Management Proprietary Limited	2021/869387/07	N/A
Momentum ESD Trust	IT002721/2015 (G)	4240271223
Momentum Finance Company Proprietary Limited	1952/001639/07	4420103816
Momentum Group Foundation NPC	2009/004751/08	4470253776

Measured Entity

Momentum Group Limited

Certificate Number

MGL010304-REV8

Issue Date

22 October 2024

Expiry Date

21 October 2025

William Smith

 William Smith
 Technical Signatory

AQRate has assessed and verified the relevant B-BBEE Elements of the above mentioned entity, to provide an independent and impartial opinion on the B-BBEE status of the entity, based on the Amended Financial Services Charter Sector Code (FS000 - FS800), as well as the Broad-Based BEE Codes of Good Practice (Codes 000-600), as amended.



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ANNEXURE B

Momentum Procure and Lease (Pty) Limited	Registration	VAT Number
Momentum Isabelo Trust	2005/013683/07	4920225366
Momentum Lending Proprietary Limited	IT001977/2020	N/A
Momentum Metropolitan Life Limited	2016/493907/07	4840277760
Momentum Strategic Investments Proprietary Limited	1904/002186/06	4380101552
Momentum Umhlanga Proprietary Limited	1998/017640/07	N/A
Momentum Money Proprietary Limited	2015/148600/07	4610272157
Momentum Multiply Proprietary Limited	1971/006353/07	4660202617
Momentum Outcome-Based Solutions Proprietary Limited	2014/188245/07	4920285956
Momentum Property Investments Proprietary Limited	2004/023064/07	4910215708
Momentum Securities Nominees (RF) Proprietary Limited	1965/005252/07	4780109395
Momentum Securities Proprietary Limited	1967/007472/07	N/A
Momentum Thebe Ya Bophelo Proprietary Limited	1974/000041/07	4130149018
Momentum Trust Limited	1993/006699/07	4720154964
Momentum Wealth Nominees Proprietary Limited	1917/001569/06	4500260353
Momentum Wealth Proprietary Limited	1986/004543/07	N/A
MPOF General Partner Proprietary Limited	1995/008800/07	4300152826
MPOF Hammersdale Proprietary Limited	2015/275368/07	N/A
MPOF Investments GP1 Proprietary Limited	2018/273999/07	4030283354
MPOF Rosslyn Development (Pty) Ltd	1990/004666/07	N/A
Partner Risk Solutions Proprietary Limited	2022/537664/07	4090307713
Rilarex (Pty) Ltd	2016/544416/07	4570279861
SMH Land Development Proprietary Limited	2013/065603/07	4500264694
Taung Square Proprietary Limited	1961/000058/07	4570105363
Umgeni Development 1 Proprietary Limited	2009/018338/07	450259888
Umgeni Development 2 Proprietary Limited	2016/388505/07	4620279770
Umgeni Development No 4 Proprietary Limited	2015/275385/07	4630279778
Von Brandis Square Development Co Proprietary Limited	2007/016889/07	4120251014
Workers Health Investments Proprietary Limited	1983/004007/07	4230121339
IMG Affiliates 2 Proprietary Limited	2021/762913/07	N/A
IMG Affiliates 2B Proprietary Limited	2015/138457/07	N/A
Investment Managers Group Proprietary Limited (IMG)	2021/707705/07	N/A
Momentum Health Consultants Proprietary Limited	2021/987731/07	N/A
Royal Investment Managers Proprietary Limited	2023/098794/07	N/A
The Edge Trust	2016/191497/07	N/A
	IT002174/2017T	N/A

AQRated

Level 1
CONTRIBUTOR

B-BBEE Verified Company

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Momentum Group Limited
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