


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-REV9

B-BBEE SCORE PER ELEMENT

Equity Ownership	23.25
Management Control	12.88
Skills Development	16.23
Procurement Enterprise & Supplier Development	30.09
Socio-Economic Development & Consumer Education	6.23
Empowerment Financing	12.95
Access to Financial Services	8.92
Additional Y.E.S points	0.00
Total Score	110.55
Converted score (for information purposes only)	102.26

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
Voting Rights of Black People	30.60%	N/A
Voting Rights of Black Women	15.62%	N/A
Economic Interest of Black People	21.55%	N/A
Economic Interest of Black Women	11.55%	N/A
51% Black Owned	No	
30% Black Women Owned	No	
51% Black Designated Group Supplier	No	
Total Black Designated Groups	3.49%	
Black Youth	3.49%	
Black Disabled People	0.01%	
Black Unemployed People	0.00%	
Black People living in rural/under-developed areas	0.00%	
Black Military Veterans	0.00%	

Measurement Period	Financial Year Ended 30 June 2025
Applicable Scorecard	Amended Financial Sector Generic Scorecard: Long-Term Assurers
Applicable BEE Code	Gazetted Codes 41287
Date of Issue	20 October 2025
Date of Re-issue	N/A
Expiry Date	19 October 2026

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
BDC Property Partners Proprietary Limited	2023/189150/07	N/A
Blue Hills PFS Proprietary Limited	2025/083818/07	N/A
Chuma Mall Proprietary Limited	2016/121951/07	4950282303
Curate Investments Proprietary Limited	2023/747232/07	4830318129
Equilibrium Investment Management Proprietary Limited	2007/018275/07	4830250959
ERIS Property Group Proprietary Limited	2008/006570/07	4860247198
Finglobal Migration Proprietary Limited	2009/023667/07	N/A
Gamaphuteng Enterprises Proprietary Limited	1979/002098/07	4920110089
Guardrisk Alternative Partner Solutions 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
IMG Affiliates 2 Proprietary Limited	2015/138457/07	4740270741
IMG Affiliates 2B Proprietary Limited	2021/707705/07	N/A
Investment Managers Group Proprietary Limited (IMG)	2021/987731/07	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
MMI Short Term Insurance Administration Proprietary Ltd	1968/013691/07	4030264693
Momentum Isabelo Trust	IT001977/2020	N/A
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 Finance Proprietary Limited	1952/001639/07	4420103816
Momentum Group Foundation NPC	2009/004751/08	4470253776
Momentum Group-Wide Services Proprietary Limited	2005/013683/07	4920225366

Measured Entity	Momentum Group Limited
Certificate Number	MGL010304-REV9
Date of Issue	20 October 2025
Date of Re-issue	N/A
Expiry Date	19 October 2026

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.


ANNEXURE B

Subsidiary / Division / Entity	Registration	VAT Number
Momentum Health Consultants Proprietary Limited	2023/098794/07	4150318873
Momentum Health 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 Lending Proprietary Limited	2016/493907/07	4840277760
Momentum Metropolitan ESD Trust	IT002721/2015 (G)	4240271223
Momentum Metropolitan Life Limited	1904/002186/06	4380101552
Momentum Multi-Manager Proprietary Limited	2004/023064/07	4910215708
Momentum Multiply Proprietary Limited	2014/188245/07	4920285956
Momentum Property Investments Proprietary Limited	1965/005252/07	4780109395
Momentum Securities Nominees (RF) Proprietary Limited	1967/007472/07	N/A
Momentum Securities Proprietary Limited	1974/000041/07	4130149018
Momentum Strategic Investments Proprietary Limited	1998/017640/07	N/A
Momentum Thebe Ya Bophelo Proprietary Limited	1993/006699/07	4720154964
Momentum Trust Limited	1917/001569/06	4500260353
Momentum Umhlanga Proprietary Limited	2015/148600/07	4610272157
Momentum Wealth Nominees Proprietary Limited	1986/004543/07	N/A
Momentum Wealth Proprietary Limited	1995/008800/07	4300152826
MPOF General Partner Proprietary Limited	2015/275368/07	N/A
MPOF Hammersdale Proprietary Limited	2018/273999/07	4030283354
MPOF Investments GP1 Proprietary Limited	1990/004666/07	N/A
MPOF Rosslyn Development Proprietary Limited	2022/537664/07	4090307713
Partner Risk Solutions Proprietary Limited	2016/544416/07	4570279861
Royal Investment Managers Proprietary Limited	2016/191497/07	N/A
SMH Land Development Proprietary Limited	1961/000058/07	4570105363
Taung Square Proprietary Limited	2009/018338/07	450259888
The Edge Trust	IT002174/2017T	N/A
Von Brandis Square Development Co Proprietary Limited	1983/004007/07	4230121339
Workers Health Investments Proprietary Limited	2021/762913/07	N/A
Zest Life Investments Proprietary Limited	2001/018097/07	4910251133
Momentum Rosslyn Development Proprietary Limited	2022/537652/07	4330307523
Portfolio Energy Investments Proprietary Limited	2025/083906/07	N/A



Measured Entity	Momentum Group Limited
Certificate Number	MGL010304-REV9
Date of Issue	20 October 2025
Date of Re-issue	N/A
Expiry Date	19 October 2026

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.

