

Independent Credible Assurance.



AQRate
RATING AGENCY

AQRate (Pty) Ltd (Reg no. 2002/001364/07) | Unit OL012 Ground Floor Oak Leaf Terrace, Old Oak Office Park, 1 Edmar Street, Bellville, 7530 |
Tel: 086 12 77 283 | www.aQRate.co.za

MEASURED ENTITY

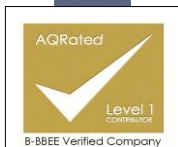
Company Name	Momentum Group Limited (includes entities listed in Annexure A-B)
Trade Name	Momentum Group Limited
Location	268 West Avenue Centurion 0157
Registration Number	2000/031756/06
VAT Number	N/A
SDL Number	L900712631
Certificate Number	MGL010304-REV10

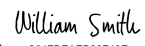
B-BBEE SCORE PER ELEMENT

Equity Ownership	26.00
Management Control	12.53
Skills Development	16.65
Procurement Enterprise & Supplier Development	29.80
Socio-Economic Development & Consumer Education	6.69
Empowerment Financing	12.82
Access to Financial Services	8.64
Additional Y.E.S points	0.00
Total Score	113.13
Converted score (for information purposes only)	104.64

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 (*Economic Interest)	29.60%	N/A
Black Female Ownership (*Economic Interest)	15.68%	N/A
Total Black Designated Groups	8.83%	
Black Youth	8.59%	
Black Disabled People	0.00%	
Black Unemployed People	0.00%	
Black People living in rural/under-developed areas	0.21%	
Black Military Veterans	0.00%	
Measurement Period	Financial Year Ended 30 June 2026	
Applicable Scorecard	Amended Financial Sector Generic Scorecard: Long-Term Assurers	
Applicable BEE Code	Gazetted Codes 41287	
Date of Issue	30 September 2026	
Date of Re-issue	N/A	
Expiry Date	29 September 2027	



Signed by:

C017DEAFB86F49E...

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), in line with the Broad-Based BEE Codes of Good Practice (Codes 000-600), as amended.



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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 GL Proprietary Limited	9068121277	N/A
Allens Nek PFS (Pty) Ltd	2021/443064/07	4350296374
Amandla Renewable Energy Fund (RF) Proprietary Limited	2019/569240/07	TBA
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	TBA
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	TBA
Investment Managers Group Proprietary Limited (IMG)	2021/987731/07	TBA
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 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
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



Measured Entity
 Certificate Number
 Date of Issue
 Date of Re-issue
 Expiry Date

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 MGL010304-REV10
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ANNEXURE B

Subsidiary / Division / Entity	Registration	VAT Number
Momentum Insure Company Limited	9821713147	4640221745
Momentum Investments Management Proprietary Limited	9505197203	N/A
Momentum Isabelo Trust	0307889287	N/A
Momentum Lending Proprietary Limited	9467468188	4840277760
Momentum Metropolitan ESD Trust	920725199	4240271223
Momentum Metropolitan Life Limited	9750145717	4380101552
Momentum Multi-Manager Proprietary Limited	9467489150	4910215708
Momentum Multiply Proprietary Limited	9514561175	4920285956
Momentum Property Investments Proprietary Limited	9200201714	4780109395
Momentum Rosslyn Development Proprietary Limited	9838275189	4330307523
Momentum Securities Nominees (RF) Proprietary Limited	9321033848	N/A
Momentum Securities Proprietary Limited	9528001846	4130149018
Momentum Strategic Investments Proprietary Limited	9383396844	N/A
Momentum Thebe Ya Bophelo Proprietary Limited	9590165073	4720154964
Momentum Trust Limited	9800201718	4500260353
Momentum Umhlanga Proprietary Limited	9802/134/16/4	4610272157
Momentum Wealth Nominees Proprietary Limited	9249091845	N/A
Momentum Wealth Proprietary Limited	9551365647	4300152826
MPOF General Partner Proprietary Limited	9361182182	N/A
MPOF Hammersdale Proprietary Limited	9753099176	4030283354
MPOF Investments GP1 Proprietary Limited	9587207847	N/A
MPOF Rosslyn Development Proprietary Limited	9852183186	4090307713
Partner Risk Solutions Proprietary Limited	9730760163	4570279861
Portfolio Energy Investments Proprietary Limited	9722503191	N/A
Royal Investment Managers Proprietary Limited	TBA	TBA
SMH Land Development Proprietary Limited	9275106715	4570105363
Taung Square Proprietary Limited	9040327224	450259888
The Edge Trust	2361780170	N/A
Von Brandis Square Development Co Proprietary Limited	9250120715	4230121339
Workers Health Investments Proprietary Limited	9257032269	N/A
Zest Life Investments Proprietary Limited	9559167144	4910251133
New Smal Construction Company Proprietary Limited	4210121333	N/A



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