



Investment Accounts

MOVE^{classic}

The classic
investment account

- > 10.000 products*
- Funds and ETFs from more than 400 investment companies
- Ideal for the client with an individual choice of securities

** depending on the country of origin/distribution authorisation*

MOVE^{flex}

The flexible
investment account

- Same product variety as MOVE^{classic}
- Flexibility in fee structure
- Also suitable for fee-based advisors

MOVE^{easy}

The investment
account with different
investment strategies

- Portfolio with pre-selected funds
- For different risk/opportunity profiles
- With quarterly rebalancing

MOVE^{active}

The actively managed
investment account

- Actively managed account with an asset management mandate
- For different risk/opportunity profiles
- With quarterly rebalancing and detailed reporting

MOVE*classic*

Classical brokerage account

- › Annual account fee of 48 EUR
- › Standard transaction fees for investment funds and other securities
- › Reduced transaction fees for Top 100 ETFs
- › Standard custody fees
- › Standard trailer fee terms
- › Frontload discountable up to 100%
- › Standard reporting

MOVE*flex*

Brokerage account with flexible fee structure

- › Platform fee based on account assets
- › Standard transaction fees for investment funds and other securities
- › Reduced transaction fees for Top 100 ETFs
- › Standard custody fees
- › Standard trailer fee terms
- › Frontload discountable up to 100%
- › Standard reporting
- › Financial advisor may choose to pass on trailer fees to investor
- › Financial advisor may add an ongoing service fee and/or a charge on incoming payments

MOVE*easy*

Portfolio allocation with quarterly rebalancings for different risk/opportunity profiles, no asset management mandate

- › Platform fee calculated based on account assets
- › No account fee, no transaction fee, no custody fee, no portfolio management fee
- › Financial advisor may choose to pass on trailer fees to investor
- › Financial advisor may add an ongoing service fee and/or a charge on incoming payments
- › Moventum offers fixed investment models in an „execution only“ framework (no active management) for different risk/opportunity profiles, e.g. MOVEeasy inspired by Vanguard funds
- › Quarterly rebalancing
- › Standard reporting

MOVE*active*

Professional asset management with asset management mandate between client and portfolio manager

- › Platform fee calculated based on account assets
- › No account fee, no transaction fee, no custody fee
- › Portfolio management fee between client and portfolio manager
- › Financial advisor may choose to pass on trailer fees to investor
- › Financial advisor may add an ongoing service fee and/or a charge on incoming payments
- › Quarterly rebalancing and reallocation
- › Detailed portfolio reporting for financial advisor and clients
- › Advisor support through regular webinars



For more information visit our website www.moventum.lu
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