



**Press Release**

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27 March 2019

### **Two AmInvest Funds Win Lipper Awards for Performance**

Two of AmInvest funds have received top honours for its fund performance at the Lipper Fund Awards from Refinitiv 2019<sup>1</sup> (“Lipper Awards”). The award-winning funds are AmMalaysia Equity and AmBalanced.

AmMalaysia Equity and AmBalanced have demonstrated consistently strong risk adjusted returns compared with peers over a three-year period ending 31 December 2018 in their respective categories. AmMalaysia Equity clinched the Lipper Award for best performing equity fund under the Equity Malaysia – Malaysia Pension category, whereas AmBalanced was recognised within the Mixed Asset MYR Bal – Malaysia – Malaysia Pension classification<sup>1</sup>.

Commenting on these wins, Goh Wee Peng, Chief Executive Officer of AmInvest said, “We are honoured to take home these awards as they demonstrate the strength of our investment team in adding value to these funds’ overall performance over time. Our investment approach is a combination of both a top-down process which involves analysis such as on economics, and a bottom-up process whereby we identify sectors and securities to buy and sell. Despite the challenging market conditions last year, our fund managers have capitalised on investment opportunities, and our robust investment processes have enabled us to deliver consistent positive returns for these funds”.

AmMalaysia Equity’s investment objective is to provide long-term capital appreciation by investing in equities listed in Malaysia. The fund invests in companies across a wide range of industries with above average growth potential. Since 2015, AmMalaysia Equity has generated a three-year total return of around 16.3%<sup>2</sup>.

AmBalanced aims to grow the value of investments in the long-term with lower volatility through asset diversification via exposure to both equities and fixed income instruments. Over the last three years, the fund's total return was around 14.0%<sup>2</sup>.

Both award-winning funds are unit trust funds eligible under the Employees Provident Fund Member's Investment Scheme ("EPF MIS"). EPF MIS allows EPF members to transfer a portion of their savings from their Account 1 for investments through appointed fund management institutions as an option to enhance their retirement savings.

AmInvest also offers one of the most diverse range of retirement funds in the market comprising 10 AmPRS funds across various asset classes and geographical exposure, in both the conventional and Shariah-compliant spaces<sup>3</sup>. As at December 2018, AmPRS – Dynamic\* Sukuk was the best performing PRS fund in Malaysia over a one-year performance period, clocking in a total return of around 5.1%<sup>4</sup>.

#### **About AmInvest**

AmInvest is the brand for the funds management business of AmFunds Management Berhad and AmIslamic Funds Management Sdn Bhd, both of which are wholly-owned subsidiaries of AmInvestment Bank Berhad. AmInvest is a multiple award-winning funds management house based in Malaysia with 38 years of investing experience. It manages unit trust funds, wholesale funds, institutional mandates, Exchange Traded Funds (ETF) and Private Retirement Scheme (PRS) funds, encompassing both conventional and Shariah-compliant funds.

#### **Notes and Sources:**

# The word "Dynamic" in the context refers to the Fund's investment strategy which is active management, not buy-and-hold strategy.

\* The word "Dynamic" in this context refers to the Target Fund's investment strategy which is active management, not buy-and-hold strategy.

<sup>1</sup> Lipper Fund Awards from Refinitiv 2019, March 2019.

<sup>2</sup> Based on data compiled by Lipper, Refinitiv, for a three-year total return as at 31 December 2018. Performance is shown in Malaysian Ringgit on a Net Asset Value (NAV) price basis with income distribution reinvested. Performance figures are calculated net of all fees, charges and expenses, except entry charge and exit penalty (if any). Past performance is not indicative of future performance.

<sup>3</sup> Based on data compiled by Lipper, Refinitiv on the list of PRS funds in Malaysia as at 28 February 2019.

<sup>4</sup> Based on data compiled by Lipper, Refinitiv under the Pension Funds category (according to Lipper Global Classification) in Malaysia for the fund's one-year total return as at 31 December 2018. Primary funds are to be used by default in performance statistics to prevent double counting and ranking anomalies. Performance is shown in Malaysian Ringgit on a Net Asset Value (NAV) price basis with income distribution reinvested. Performance figures are calculated net of all fees, charges and expenses, except entry charge and exit penalty (if any). Past performance is not indicative of future performance.

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