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### **Three AmInvest Fixed Income Funds Picked as FSMOne Recommended Unit Trusts**

Three AmInvest fixed income funds have been selected at this year's FSMOne Recommended Unit Trusts Awards 2021/22 ("**Awards**")<sup>1</sup> in recognition of consistent outperformance amongst peers within their respective categories.

AmIncome Plus was listed as the recommended unit trust fund under the Core Fixed Income-Malaysia (Short Duration) category for the eighth year, whereas AmDynamic<sup>#</sup> Bond topped the Fixed Income-Malaysia with Foreign Exposure category for the sixth year running.<sup>1</sup> In addition, AmTactical Bond was singled out as the recommended unit trust fund under the Fixed Income-Asia category this year.<sup>1</sup> AmInvest is the fund management brand under AmInvestment Bank.

The Awards assist investors to shortlist consistently performing unit trust funds amongst their peers. FSMOne is an online investment platform that distributes unit trusts, stocks, exchange traded funds, insurance, bonds and managed portfolios.

For the Awards, unit trust funds with at least three years of track record (as at end March 2021) were rigorously assessed amongst peers in the same category. The methodology for fund assessment was based on a combination of quantitative and qualitative factors. The quantitative factors taken into account were historical performance, risk and expense ratio. Meanwhile, additional qualitative factors such as fund house's investment philosophy and consistency in its investment approach were also considered to determine the winners in each category.

Ms. Goh Wee Peng, Chief Executive of AmInvest, said, "With our stringent credit processes and superior credit selection by our in-house proprietary credit research unit spanning over four decades, we offer investors the opportunity to

optimise returns with lower risk assets, within acceptable risk boundaries. Throughout the years, we have received various awards for our expertise in managing fixed income investments, including Best Bond Fund Family Group Over Three Years for the second year at the Refinitiv Lipper Fund Awards Malaysia 2021.<sup>3</sup> Last year, we adopted dynamic asset allocation investment strategies for our AmDynamic<sup>#</sup> Bond and AmTactical Bond funds which provided the flexibility to switch between aggressive and defensive stances to capitalise on market conditions.”

AmIncome Plus is suitable for investors with a short to medium-term investment horizon who want to invest the cash portion of their investment portfolio for the potential to reap regular income and to preserve capital. For a one-year period (as at March 2021), the fund posted a total return (a measure of the fund’s performance comprising income distribution and capital gains) of around 3.2% and 12.0% over a three-year period.<sup>2</sup>

AmDynamic<sup>#</sup> Bond seeks to optimise risk-adjusted returns for investors including interest rate expectations, currency movements and diversification opportunities through its exposure to both local as well as foreign bonds. This medium to long-term bond fund employs an active management investment strategy that seeks to increase returns by capitalising on market views and timing decisions, as opposed to a buy-and-hold strategy. The fund achieved a one-year total return of 4.4% and 20.7% over three years up to end March 2021.<sup>2</sup>

AmTactical Bond aims to provide income and to a lesser extent capital appreciation by investing primarily in local and foreign bonds. It is also a medium to long-term bond fund that is actively managed in which its trading activities will depend on investment opportunities. Over one-year and three-year periods (as at March 2021), the fund has registered total return of 7.0% and 20.0% respectively.<sup>2</sup>

#### **About AmInvest**

AmInvest is the brand name 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. We are a multiple award-winning fund manager based in Malaysia with 40 years of investing experience managing unit trust funds, wholesale funds, institutional mandates, Exchange Traded Funds (ETF) and Private Retirement Scheme (PRS); encompassing both conventional and Shariah-compliant funds.

**Sources and Notes:**

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

<sup>1</sup> iFAST Capital Sdn Bhd, July 2021.

<sup>2</sup> Based on performance data for AmIncome Plus, AmDynamic<sup>#</sup> Bond and AmTactical Bond B MYR compiled by Lipper, Refinitiv, as at 31 March 2021. Performance is shown in Malaysian Ringgit on a 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> Refinitiv Lipper Fund Awards Malaysia 2021, March 2021.

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