

29 August 2023

## **AmInvest Wins 3 Awards in FSMOne Recommended Unit Trusts Awards 2023/24**

AmInvest received three fund awards at the FSMOne Recommended Unit Trusts Awards 2023/24 (**the "Awards"**)<sup>1</sup> in recognition of its consistent outperformance amongst peers within the respective categories of the three winning funds. FSMOne is an online investment platform that distributes unit trusts, stocks, exchange-traded funds, insurance, bonds and managed portfolios. AmInvest is the brand name for the fund management business of AmFunds Management Berhad and AmIslamic Funds Management Sdn. Bhd.

AmIncome Plus was selected as the recommended unit trust fund under the Fixed Income – Malaysia (Short Duration) category, whereas AmBond was chosen for the Core Fixed Income – Malaysia<sup>1</sup>. Concurrently, Europe Equity Growth fund won the Sub Regional Equity – Europe, for the second consecutive year<sup>1</sup>.

To qualify for the Awards, unit trust funds with at least three years of track record (as at end March 2023) 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 considered were historical performance, risk and expense ratio.

Ms. Goh Wee Peng, Chief Executive Officer of AmFunds Management Berhad, said, "We are pleased with our investment team's strategy over the review period, overweighting portfolio duration to position for a bullish flattening of the yield curve and overweighting credit securities. Europe Equity Growth which invests into Europe stocks has benefited from the gains from Europe's stock markets."

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 to reap the potential regular income and capital preservation. For the last five-year period (as at June 2023), the fund posted a total return (a measure of the fund's performance comprising income distribution and capital gains) of around 18.25% with an annualised total return of around 3.41%<sup>2</sup>.

AmBond seeks to provide regular income stream by investing in medium to long-term local and global bonds. The fund invests in securities from Malaysia and, to a lesser extent, from other countries globally. This fund employs active management 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 five-year total return of 24.30% with an annualised total return of 4.44% (as at June 2023)<sup>2</sup>.

Europe Equity Growth which feeds into Allianz Europe Equity Growth, a long-term capital growth fund, invests in European equity markets. The fund generated a total return of 53.67% with an annualised return of 8.97% over the last five years (as at June 2023)<sup>2</sup>.

#### **About AmInvest**

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

#### **Sources:**

<sup>1</sup> FSMOne Malaysia, July 2023.

<sup>2</sup> Based on performance data for AmIncome Plus, AmBond and Europe Equity Growth compiled by Lipper, Refinitiv, as at 30 June 2023. Performance is shown in Malaysian Ringgit on a Net Asset Value 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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