

AmInvest's Four Funds Won in FSMOne Recommended Unit Trusts Awards 2022/23

Four AmInvest funds have been selected at the FSMOne Recommended Unit Trusts Awards 2022/23 ("the Awards")¹ in recognition of its consistent outperformance amongst peers within their respective categories. FSMOne is an online investment platform that distributes unit trusts, stocks, exchange-traded funds, insurance, bonds and managed portfolios.

AmIncome Plus was listed as the recommended unit trust fund under the Fixed Income – Malaysia (Short Duration) category for the ninth year, whereas AmDynamic[#] Bond topped the Fixed Income-Malaysia with Foreign Exposure category for the seventh year running.¹ AmTactical Bond was singled out as the recommended unit trust fund under the Fixed Income - Asia ex-Japan category for two consecutive years.¹ In addition, Europe Equity Growth won the Sub Regional Equity – Europe category this year.¹

For the Awards, unit trust funds with at least three years of track record (as at end March 2022) 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. Meanwhile, additional qualitative factors such as the 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, AmInvest

Ms. Goh Wee Peng, Chief Executive Officer of AmFunds Management Berhad, said, "Given the challenging markets in 2021, these achievements reflected well on our team's strategy over the review period. We took a more conservative approach in managing the fixed income investments with the expectations of rising interest rates. Meanwhile, Europe Equity Growth which invests into Europe growth stocks has benefited from the recovery of 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 three-year period (as at March 2022), the fund posted a total return (a measure of the fund's performance comprising income distribution and capital gains) of around 10.0% with an annualised total return of around 3.2%.²

AmDynamic[#] 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 three-year total return of 14.3% with an annualised total return of 4.5% (as at March 2022).²

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 the three-year period (as at March 2022), the fund registered a total return of 7.7% with an annualised total return of 2.5%.²

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 44.3% with an annualised total return of 13.0% over the three years (as at March 2022).²

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.

1 FSMOne Malaysia, July 2022.

2 Based on performance data for AmIncome Plus, AmDynamic[#] Bond, AmTactical Bond B MYR and Europe Equity Growth compiled by Lipper, Refinitiv, as at 31 March 2022. 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.

Award-Winning Funds Management Company



4 DECADES
Managing Funds

- AmIncome Plus (Core Fixed Income - Malaysia [Short Duration]) (9 consecutive years)
- AmDynamic Bond (Fixed Income - Malaysia with Foreign Exposure) (7 consecutive years)
- AmTactical Bond (Fixed Income - Asia) (2 consecutive years)
- Europe Equity Growth (Equity - Europe)

FSMOne Recommended Unit Trusts Awards 2022/2023

- Best Overall Asset & Fund Manager, Malaysia (5 consecutive years)
- Best Asset Manager (Fixed Income), Malaysia (3 consecutive years)
- Best Fund Manager for Pension Mandates, Malaysia

Alpha Southeast Asia 13th Annual Fund Management Awards 2022

- Fund House of the Year Award, Malaysia

AsianInvestor Asset Management Awards 2022

- Insurance Fund House of the Year, Malaysia (5 consecutive years)

Insurance Asia News Institutional Asset Management Awards 2022

- Best Pension Fund Manager, Malaysia (4 consecutive years)
- Best Bond Manager, Malaysia (2 consecutive years)
- Best Sukuk Manager, Malaysia
- Best ESG Engagement Initiative, Malaysia

Asia Asset Management Best of the Best Awards 2022

- Best Investment Fund Manager, Malaysia

Capital Finance International (CFI.co) 2022

- AmASEAN Equity, Best Equity ASEAN Fund Over 5 Years

Global Islamic 2022 Refinitiv Lipper Fund Awards

- Best Bond Fund Family Group Over 3 Years (3 consecutive years)
- AmDynamic Bond, Best Bond MYR Fund Over 3 Years (3 consecutive years)
- AmDynamic Bond, Best Bond MYR Fund Over 5 Years (3 consecutive years)
- AmDynamic Bond, Best Bond MYR Fund over 10 Years

Refinitiv Lipper Fund Awards Malaysia 2022

- Best Domestic Fixed Income Fund Manager 2021 (2 consecutive years)

EPF External Fund Managers Annual Awards 2021

Note: More info on the awards at aminvest.com



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