

AmInvest Sweeps Best Bond Group and Two Best Fund Awards at LSEG Lipper Fund Awards



(From left) Mr. Xav Feng - Director of Lipper Asia Pacific Research, LSEG, Ms. Goh Wee Peng - Chief Executive Officer of AmFunds Management Berhad and Mr. Kuek Ser Kwang Zhe - Editor of Wealth, The Edge at the award ceremony of LSEG Lipper Awards Malaysia 2024.

AmInvest has taken home the Best Bond Fund Family Group Over Three Years – Malaysia (“Best Bond Group”) award at the LSEG Lipper Fund Awards Malaysia 2024 (“LSEG Lipper Awards”)¹ for the fifth consecutive time². AmInvest’s AmDynamic[#] Bond clinched the best fund award for its ten-year performance in the Bond MYR – Malaysia Pension category, and AmMalaysia Equity emerged as the best fund over ten years under the Equity Malaysia – Malaysia Pension.

AmInvest is the brand name for the fund 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 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.

The annual LSEG Lipper Awards highlights funds and fund companies that have excelled in delivering consistently strong risk-adjusted performance relative to their peers for the year ended 31 December 2023.¹

Commenting on the wins, Ms. Goh Wee Peng, Chief Executive Officer of AmFunds Management Berhad, said, “Being recognised as the Best Bond Group over the last five years is a strong affirmation of our fund managers’ capabilities in executing investment strategies impeccably. AmDynamic[#] Bond and AmMalaysia Equity’s outperformance is attributed to the flexibility of their investment strategies to dynamically switch between aggressive and defensive stances to capitalise on market conditions. These acknowledgements augur well for us particularly at uncertain times where investors are on the lookout for fund managers who can deliver consistent outperformance year after year.”

Meanwhile, commenting on the market moving forward, Mr. Wong Yew Joe, Chief Investment Officer of AmFunds Management Berhad, added, “We are optimistic about the outlook of the bond market, which we believe will do well seeing that global interest rates are on a softening trend. The local equity market could remain positive given the recently announced government initiatives which should lead the market performance.”

AmDynamic[#] Bond seeks to potentially optimise risk-adjusted returns for investors based on, amongst others, interest rate expectations, currency movements and diversification opportunities through its exposure to both local as well as foreign bonds. The 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. AmMalaysia Equity aims to provide long-term capital appreciation by investing in Malaysian equities. The fund invests in companies across a wide range of industries with above average growth potential. Its investment strategy allows the fund to quickly shift its focus between large, mid and small cap stocks enabling it to potentially outperform its benchmark in most market conditions.

Both award-winning funds are unit trust funds qualified under the Employees Provident Fund Members Investment Scheme (“EPF MIS”). Under the EPF MIS, members can invest a part of their EPF Account 1 savings in unit trust funds and private mandate portfolios if they meet the Basic Savings requirement. This scheme offers flexibility for members to diversify and enhance their retirement savings through designated Fund Management Institutions, including Unit Trust Management Companies and Asset Management Companies.³

Note and sources:

[#] The word “Dynamic” in the context refers to the fund’s investment strategy which is active management, not buy-and-hold strategy.

¹ LSEG Lipper Fund Awards 2024, Malaysia, March 2024.

² LSEG Lipper Fund Awards 2020, 2021, 2022, 2023 and 2024.

³ Employees Provident Fund (EPF) website accessible via <https://www.kwsp.gov.my/member/savings/i-invest>, March 2024.

Award-Winning Funds Management Company



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

LSEG Lipper Fund Awards Malaysia 2024

- Best Pension Fund Manager, Malaysia (6 consecutive years)
- Best Bond Manager, Malaysia (4 consecutive years)
- Best Sukuk Manager, Malaysia (3 consecutive years)
- Islamic Institutional House of the Year, Malaysia (2 consecutive years)
- Best ASEAN Awards: Best Application of ESG
- Best ESG Manager, Malaysia
- Best Performance Award: Asian REITS (5 Years) (2 consecutive years)
- Best Performance Award: Asian Bonds, Local Currency (10 Years)

Asia Asset Management Best of the Best Awards 2024

- Cambridge Excellence Award for Islamic Asset Management in Malaysia 2024
- Best Sukuk Fund in Malaysia

Cambridge Islamic Funds Awards (CIFA) 2024

- Best Selling Unit Trusts 2023 - AmIncome

IFAST Awards Night 2024

- AmIncome Plus (Fixed Income - Malaysia) (Short Duration)
- Europe Equity Growth (Equity - Europe) (2 consecutive years)
- AmBond (Core Fixed Income - Malaysia)

FSMOne Recommended Unit Trusts Awards 2023/24

- Sustainable Series - Climate Tech Fund
- Best Impact in Climate Action (Silver)
- Sustainable Series - Positive Change Fund
- Best Impact in Basic Needs (Silver)

The Edge ESG Awards 2023

- Insurance Fund House of the Year, Malaysia (6 consecutive years)
- Best Islamic Fund Manager

InsuranceAsia News Institutional Asset Management Awards 2023

- Best ETF Provider, Malaysia (2 consecutive years)

The Asset Triple A Sustainable Investing Awards for Institutional Investor, ETF, and Asset Servicing Providers 2023

- Best Asset Manager (Money Market Funds), Malaysia
- Best Fund with the Optimal Information Ratio in Malaysia

Alpha Southeast Asia 14th Annual Fund Management Awards 2023

- Best Domestic Fixed Income Fund Manager 2022

EPF External Fund Managers Awards 2022

Note: More info on the awards at www.aminvest.com



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