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## **AmIncome Plus and AmDynamic# Bond Selected Again as FSMOne Recommended Unit Trusts**

Two AmInvest unit trust funds have been picked again in this year's FSMOne Recommended Unit Trusts Awards 2019/20 ("Recommended Unit Trusts List")<sup>1</sup> for their consistent performance among peers in their respective categories. AmIncome Plus was listed as the recommended unit trust fund under the Fixed Income-Malaysia (Short Duration) category for the sixth consecutive year, whereas AmDynamic# Bond topped the Fixed Income-Malaysia with Foreign Exposure category for the fourth year running.<sup>2</sup>

The Recommended Unit Trusts List by FSMOne Malaysia assists investors to shortlist consistent performing unit trust funds amongst their peers.<sup>1</sup> FSMOne Malaysia is the online distribution arm of iFAST Capital Sdn Bhd for unit trusts, insurance, bonds and managed portfolios.<sup>1</sup>

Unit trust funds with a track record of at least three years (as at end March 2019) were considered and the returns of these funds were then compared against benchmarks and peers within similar sectors and regions.<sup>1</sup> The methodology for fund assessment was based on a combination of quantitative and qualitative factors.<sup>1</sup> The quantitative factors considered were historical performances, expense ratio and risk.<sup>1</sup> Meanwhile, qualitative factors that were used as barometers to determine the winners in each category included the fund house's investment philosophy and consistency in their investment approach.

"During the volatile market conditions of 2018, our experienced fixed income team capitalised on investment opportunities, and our robust investment processes

which include our stringent credit processes were key to delivering positive returns for these funds,” said Goh Wee Peng, Chief Executive Officer of AmInvest.

AmIncome Plus, which is the recommended unit trust fund under the Fixed Income – Malaysia (Short Duration) category, is suitable for investors who want to invest the cash portion of their investment portfolio to reap regular income. As at end March 2019, the fund registered a one-year total return (a measure of the fund’s performance comprising income distribution and capital gains) of around 4% and about 12% over a three-year period.<sup>3</sup>

AmDynamic<sup>#</sup> Bond, the recommended unit trust fund under the Fixed Income – Malaysia with Foreign Exposure category, posted a one-year total return of around 8% and 18% over three years as at end March 2019.<sup>3</sup> This medium to long-term bond fund employs an active management investment strategy that seeks to capitalise on returns based on market views and timing decisions, as opposed to a buy-and-hold strategy. AmDynamic<sup>#</sup> Bond is an eligible fund under the Employees Provident Fund Member’s Investment Scheme (“**EPF MIS**”). EPF MIS allows EPF members to transfer (subject to terms and conditions) a portion of their savings from their Account 1 for investments through appointed fund management institutions as an option to enhance their retirement savings.

#### **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. We are a multiple award-winning fund manager based in Malaysia with over 38 years of investing experience managing 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” refers to the fund’s investment strategy which is active management, not buy-and-hold strategy.*

*<sup>1</sup> FSMOne Recommended Unit Trusts Awards 2019/20, based on information verified by iFAST Capital Sdn Bhd as at 11 June 2019.*

*<sup>2</sup> FSMOne Recommended Unit Trusts Awards 2014/15, 2015/16, 2016/17, 2017/18, 2018/19 and 2019/20.*

*<sup>3</sup> Based on data compiled by Lipper, Refinitiv for one-year and three-year total returns as at 31 March 2019. 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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