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## **AmInvest Scoops Seven Awards at Refinitiv Lipper Fund Awards**

AmInvest has been recognised as the Best Bond Fund Family Group Over Three Years (“**Best Bond Group**”) for the second consecutive year at the Refinitiv Lipper Fund Awards Malaysia 2021 (“**Refinitiv Lipper Fund Awards**”).<sup>1</sup>

Concurrently, three AmInvest funds also bagged six awards for outstanding fund performance. AmDynamic<sup>#</sup> Bond clinched two awards, namely the Best Bond MYR Fund Over Three Years and Best Bond MYR Fund Over Five Years, for the second year running.<sup>1</sup> In addition, AmDividend Income emerged as the Best Equity Malaysia Income Fund Over Three Years and the Best Equity Malaysia Income Fund Over Ten Years. AmMalaysia Equity won two best fund awards for its five-year and ten-year performance as the Best Equity Malaysia Fund.<sup>1</sup>

The annual Refinitiv 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 2020.<sup>1</sup>

Commenting on the wins, Ms. Goh Wee Peng, CEO of AmInvest, said, “We are delighted to receive these acknowledgements and to be recognised for our diverse expertise within multiple categories of different asset classes. AmInvest has been managing funds for 40 years now and these awards truly underscore the strength of our investment team who were instrumental in adding value to investors’ portfolios during the uncertain market conditions of 2020. Looking ahead, we remain focused on seeking out the best opportunities all market cycles present.”

Mr. Wong Yew Joe, Chief Investment Officer of AmFunds Management Berhad (AmInvest), added, "Last year, we adopted dynamic asset allocation investment strategies which provided the flexibility to switch between aggressive and defensive stances to capitalise on market conditions, while overall we still remained relatively optimistic regarding both fixed income and equity. We shall continue to be consistent in our approach to be selective on credit exposure via our intensive credit evaluation and employ active tactical trading strategies based on prevailing market valuations and outlook to generate alpha for our fixed income investments. For equities, we identified winners such as rubber gloves and technology stocks and capitalised on trading opportunities on them, which materially boosted the funds' alpha returns during the year."

AmDynamic<sup>#</sup> Bond seeks to 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. Over the last three years (as at December 2020), the fund registered a total return (a measure of the fund's performance comprising income distribution and capital gains) of 24.7%, exceeding its benchmark returns of 22.2%, by 2.5%.<sup>2</sup> The fund's five-year total returns of 36.8% surpassed its benchmark returns of 35.5%, by 1.3%.<sup>2</sup>

AmDividend Income aims to provide income and steady capital growth by investing in potentially high dividend yielding equities in Malaysia and foreign markets. The fund is actively managed to leverage on potential investment opportunities to maximise returns. For a three-year period (as at December 2020), the fund has posted total returns of 24.6%, surpassing its benchmark returns of -8.8%, by 33.4%.<sup>2</sup> Over ten years, the fund has achieved a total return of 106.6%, outpacing its benchmark returns of 13.7%, by 92.9%.<sup>2</sup>

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. For a five-year period (as at December 2020), the fund recorded an impressive five-year total return of about 63%, beating its benchmark returns of -0.3%, by 63.3%.<sup>2</sup> Over a 10-year period, the fund posted total returns of 148.6%, surpassing its benchmark returns of 13.4%, by 135.2%.<sup>2</sup>

"This year's Refinitiv Lipper Fund Awards recognised the steadfast resolve of award-winning fund managers and firms who successfully navigated one of the sharpest market downturns and recoveries on record enabling investors to maintain a level of economic confidence amidst a backdrop of uncertainty. In a year that endured the impacts of an unprecedented global humanitarian crisis, in which markets reflected investors' emotions of shock and optimism, there was a degree of solace in having one's financial fortunes overseen by the stewardship of professional money managers. We congratulate the 2021 Refinitiv Lipper Fund award winners and wish AmInvest continued success," said Robert Jenkins, Head of Research, Lipper, Refinitiv.

#### **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.

#### **Notes & Sources:**

*# 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> *Refinitiv Lipper Fund Awards Malaysia 2021, March 2021.*

<sup>2</sup> *Based on performance data for AmDynamic# Bond, AmDividend Income and AmMalaysia Equity compiled by Lipper, Refinitiv, as at 31 December 2020. 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.*

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