



Press Release

15 March 2024

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

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”)<sup>1</sup> for the fifth consecutive time<sup>2</sup>. AmInvest’s AmDynamic<sup>#</sup> 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.<sup>1</sup>

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<sup>#</sup> 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<sup>#</sup> 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.<sup>3</sup>

**Notes and 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> LSEG Lipper Fund Awards 2024, Malaysia, March 2024

<sup>2</sup> LSEG Lipper Fund Awards 2020,2021,2022,2023 and 2024

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

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