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ASEAN Business Leaders

Kenanga Investors: Deliver returns, grow wealth

Nikkei Asian Review (Weekly Issue – Feb 12 to 18, 2018)

The Association of Southeast Asian Nations (ASEAN) is the sixth largest economy in the world, according to a Deloitte report in September. The alliance, made up of ten nations, presents to the asset management industry an investment opportunity that is expected to grow to between USD3 and USD4 trillion by 2025. Its asset under management opportunity is projected to include institutional, high-net-worth (HNW), and retail segments.



Ismitz Matthew De Alwis, Executive Director & CEO of Kenanga Investors

“It is interesting how the industry has grown now that we have more access to big data. However, at the end of the day, there is still an advisory role to be played by our asset and wealth advisers.” Ismitz Matthew De Alwis would know what he is talking about, being the Chief Executive Officer for Kenanga Investors, a wholly-owned subsidiary of Kenanga Investment Bank Berhad. The company offers investment solutions including collective investment schemes, portfolio management services, segregated private mandates, and alternative investments.” “Kenanga Investors started as mainly an institutional and pension focus fund house when we took over ING in 2013. Since then we have evolved and expanded to build diverse products, especially retail funds.”

Ismitz’s 25 years’ worth of experience in the fields of financial and investment management, adds to his leadership capabilities in managing Kenanga Investors. “Today in less than 3 years, we have mixed assets which are about 40% retail, 40% institutional and 20% wholesale. Our flagship fund Kenanga Growth Fund (KGF), a long-term capital growth fund, has grown 12 times and now stands at almost USD350 million,” Ismitz said.

The company has initiated its private wealth arm to provide financial advisory services to HNW investors and ultra-high net worth individuals, to meet their investment needs and accelerate their wealth accumulation. Within the category of fixed income where it offers Islamic bonds (sukuk) and conventional ones, its Islamic products are focused on equities and fixed income funds, a potential growth area. In recognition of the diverse market that it serves, Kenanga Investors has dedicated specialized managers to serve different segments which allow the company to build sustainable relationships with its clients. The specialized managers do this by attuning to the clients' needs as their wealth grows and offer them specific products that those needs. "There is a global Islamic wealth pool of around USD11-12 trillion that could be unlocked in the years ahead. We launched our Asia Pacific fund in 2013 which focuses on absolute returns. Subsequently, we launched an ASEAN fund that has delivered a stable 8% return. Even though some of the countries can offer double digit growth, it is highly volatile. We do not take unnecessary risks," Ismitz said.

"For the past two years, we have been building our expertise and track record on regional equities in Asia Pacific, and ASEAN, including fixed incomes, which will continue to open new avenues and unlock funds among institutional and private investors in both conventional and Islamic finance."

Much like other industries evolving due to the advancements in technology, the company recognises the need to keep up with the demands of its clients. "To ensure that we are always abreast with these advancements we continuously conduct exhausting research to

determine market readiness. We recently launched an artificial intelligence (AI) fund after some careful consideration and in-depth industry research," Ismitz said. Kenanga Global Multi Asset Fund ("KGMAF") is Malaysia's first AI driven fund and leverages on breakthroughs in AI to identify profit opportunities from short-term predictive relationships in pricing and volume data. It then constructs portfolios with a focus on capital preservation based on forecasts of instruments' movements.

2017 was an exciting year for Kenanga Investors; they were accredited with three awards for KGF, and also won the Best Equity Group (Islamic) at the Lipper Fund Awards 2017, and the inaugural Fundsupermart.com's Investors' Choice – Fund House of the Year

2017. The new year started off well, and brought a triple recognition from the 2018 Best of the Best Awards by Asia Asset Management to its Chief Investment Officer, while Ismitz himself was named Malaysia CEO of the Year. Its reputation as a pension fund manager was further solidified when the Hong Kong-based publication awarded it the title of Best Pension Fund Manager.

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