

Date: 21 August 2017

Kenanga Investors Berhad FUND HOUSE OF THE YEAR

Smart Investor (14 August 2017)

The investment house also wins 3 other awards in the core equity and PRS categories.

Kenanga Investors Berhad (KIB) receiving the coveted Fund House of the Year award at the Fundsupermart Recommended Unit Trust Award 2017 didn't come as a surprise to many. The award, voted in by visitors to Fundsupermart's website, is a testament to KIB's investment philosophy of providing consistent returns to its investors. Smart Investor had the privilege to speak to the Executive Director and Chief Executive Officer of KIB, Ismitz Matthew De Alwis, on the winning formula.

Smart Investor (SI): Congratulations to KIB for winning the Fund House of the Year award. What is your winning formula?

Ismitz Matthew (IM): Thank you very much. It is truly an honour to win the only Fundsupermart award that was voted in by the people. Our success is mainly attributed to the fact that we remained focused on our core strength, which is providing our clients with consistent returns.

Consistency is the keyword here because at the end of the day, this is what sets us apart from our competitors. We do not want to be a one-hit wonder. Even last year when the market conditions were not ideal, we still believed in proof of this.



Ismitz Matthew De Alwis

SI: What measures do you take to ensure that the fund performs to its fullest potential and beyond?

IM: We have a more disciplined approach towards fund management; meaning we don't shift our focus too often, or chase short-term gains because that's riskier. We are value stock pickers; therefore, we have a strong conviction in any stock that we pick. Conviction is very crucial to persevere in any market conditions. But that does not mean we don't do our homework. Our investing strategy involves bottom-up

stock picking backed by strong fundamental research and a thorough understanding of a company's business model. This focus on research has helped us to identify companies with resilient earnings. Picking a company is not just about visiting their corporate website and reading the page on investors' relation.

We are tasked to go beyond that. At times, a company's P&L may look good, with steady profits and ample cash in the bank; so, we'd think it's invest worthy. However, we may have to also look at other factors such as the efficient deployment of cash and thorough maximisation of shareholders' returns. These parameters will affect share prices in the long run.



SI: Tell us more about the winning funds, namely the Kenanga Growth Fund, Kenanga OnePRS Conservative Fund and Kenanga OnePRS Growth Fund. What are some of the distinctive benefits of investing in these funds?

IM: The Kenanga Growth Fund is a Malaysian equity fund that focuses on investments in small to midcap stocks and selective big cap companies. Though the risk is high, it is not as high other funds that invest in solely small or mid-cap stocks.

Our Growth Fund is by far one of the most consistent funds in the country over all periods, be it 3, 5, or 10 years. As at 30 June 2017, our 10- year returns stands at 287.92%", which is nearly three times of initial investment, despite a global financial crisis in 2008.

"We have a more disciplined approach towards fund management; meaning we don't shift our focus too often, or chase short-term gains because that's riskier."

Disregarding ringgit movement, if you plan to retire here, this is a suitable fund for you. It is open to anyone, especially if you do not have the time to dabble in the market or monitor your own stocks' performance. KGF is also ideal for millennial who wish to grow their wealth.

They can even withdraw from their EPF to invest in our fund, and at a minimum investment amount of just RM1000, it's the perfect start-off fund.

Our two award-winning private retirement scheme (PRS) funds are the OnePRS Conservative Fund and OnePRS Growth Fund. PRS funds were conceptualized mainly to encourage Malaysians to save more for retirement because it's a well-known fact that many Malaysians don't have sufficient money to sustain themselves when they retire.

The OnePRS Growth Fund is targeted at those below 40, and what makes it attractive is its returns. The fund gave 14.25%* in returns in just one year, and 25.3%* for a 3-year period as at 30 June 2017. This averages to 7.79%* per annum which is an attractive option for investors.

Kenanga Growth Fund

Fund Objective

Aims to provide unit holders with long-term capital growth.

Fund Category/Type

Equity / Growth

Launch Date

17 January 2000

Trustee

CIMB Commerce Trustee Berhad

Benchmark

FTSE Bursa Malaysia KLCI

Designated Fund Manager

Lee Sook Yee

Sales Charge

Max 5.50%

Annual Management Fee

1.50% p.a.

Annual Trustee Fee

0.05% of the NAV of the Fund p.a.

Redemption Charge

Nil

Initial Offer Price

RM1.00 per unit

All fees and charges payable to the Manager and the Trustee are subject to GST as may be imposed by the government or other authorities from time to time.



Kenanga Investors

Kenanga OnePRS Growth Fund

Fund Objective

Seeks to provide capital growth.

Fund Category/Type

Core (Growth)

Launch Date

20 November 2013

Trustee

Maybank Trustees Berhad

Benchmark

Composite of All MGS Index (30%) and FBM 100 (70%)

Designated Fund Manager

Lee Sook Yee

Sales Charge

Up to 1.50%

Annual Management Fee

1.55% p.a.

Annual Trustee Fee

0.015% p.a. of the Fund's NAV, subject to a minimum of RM6,000 p.a.

Redemption Charge

Nil

Initial Offer Price

RM 0.5000

All fees and charges payable to the Manager and the Trustee are subject to GST as may be imposed by the government or other authorities from time to time.

As for the OnePRS Conservative Fund, those 40 to 50 are our target market. For a 3-year period, the returns were at 14.48%* as at 30 June 2017; on an average it's 4.55%* a year, which is still higher than FD rates.

It's slightly lower than the PRS Growth Fund as we believe this being an individual's conservation stage, we shouldn't take a high risk approach when investing.

I say with great pride that we have always been among the top performing for the PRS Growth category with exception to its inception year.

There are 8 players in the category, and to be frank, we were the last kid on the block. But today, we are at the top spot garnering numerous awards, which simply means, we are on the right track!

“Consistency is the keyword here because at the end of the day, this is what sets us apart from our competitors. We do not want to be a one-hit wonder.”

ENDS



Article Source:

Smart Investor (14 August 2017) – Kenanga Investors Berhad: Fund House of the Year

Kenanga Investors Bhd
Fund House of the Year

The investment house also wins 3 other awards in the core equity and PIS categories.

Kenanga Investors Berhad (KIB) has been awarded the Fund House of the Year award at the FundManagement Recommended Unit Trust Award 2017. It didn't come as a surprise to many.

The award, voted in by visitors to FundManagement's website, is a testament to KIB's investment philosophy of providing consistent returns to its investors. Smart investors had the privilege to speak to the Executive Director and Chief Executive Officer of KIB, Limze Matthew De Abreu, on the winning formula.

Limze Matthew De Abreu
Executive Director and Chief Executive Officer of KIB

Smart Investor (SI): Congratulations to KIB for winning the Fund House of the Year award. What is your winning formula?

Limze Matthew (LM): Thank you very much. It is truly an honour to be the only FundManagement award that was voted in by the masses. Our success is mainly attributed to the fact that we remained focused on our core strength, which is providing our clients with consistent returns.

Consistency is the keyword here because at the end of the day, this is what sets us apart from our competitors. We do not want to be a one-hit wonder. Even last year when the market conditions were not ideal, we still believed in

We have a more disciplined approach towards fund management, meaning we don't shift our focus too often, or chase short-term gains because that's riskier."

maintaining our position among the top three in the country. Steering in consistent returns has been a winning strategy for us. In today's market, most investors know that even if we undergo a short lull as far as market performance is concerned, KIB will still deliver consistent returns over a longer period.

Kenanga Growth Equity 5-year and 10-year fund performance figures as well as its win into its 8th year in a row, are proof of this.

SI: What measures do you take to ensure that the fund performs to its fullest potential and beyond?

LM: We have a more disciplined approach towards fund management, meaning we don't shift our focus too often, or chase short-term gains because that's riskier.

We are strict on our policies; therefore, we have a strong conviction in any areas that we pick. Consistency is very crucial to permanent in any market conditions. But that doesn't mean we don't do our homework.

Our investing strategy involves bottom-up stock picking backed by strong fundamental research and a thorough understanding of a company's business model. This focus on research has helped us

to identify companies with robust earnings. Picking a company is not just about seeing their corporate website and reading the page on investor relations. We are instead to go beyond that.

At times, a company's P/E may look good, with steady profits and ample cash in the bank; so, we do think it's worth worthy.

However, we may have to also look at other factors such as the efficient deployment of cash and thorough maximisation of shareholders' returns. These parameters will affect share prices in the long run, 5, or 10 years.

As at 30 June 2017, our 10-year returns stands at 281.92%, which is nearly three times of initial investment, despite a global financial crisis in 2008.

Changing to target movements, if you plan to retire early, you do not have the time to double in the market or monitor your own stock performance. KIF is also about

as high other funds that invest in solely small or mid-cap stocks. Our Growth Fund is by far one of the most consistent funds in the country over a period, be it 5, 5, or 10 years.

As at 30 June 2017, our 10-year returns stands at 281.92%, which is nearly three times of initial investment, despite a global financial crisis in 2008.

Changing to target movements, if you plan to retire early, you do not have the time to double in the market or monitor your own stock performance. KIF is also about

Kenanga OnePIS Growth Fund

Fund Objective: Seeks to provide capital growth.

Fund Category/Type: Core (100%)

Launch Date: 20 November 2013

Trustee: Trustees Berhad

Benchmark: MSCI Malaysia Index (30%) and FBM 100 (70%)

Designated Fund Manager: Lim Zeo Yee

Sale Charge: Up to 1.0%

Annual Management Fee: 1.5% p.a.

Annual Trustee Fee: 0.015% p.a. of the fund's NAV, subject to a minimum of RM6,000 p.a.

Redemption Charge: Nil

Initial Offer Price: RM1.00

All fees and charges payable to the Manager and the Trustee are subject to GST as may be imposed by the government or other authorities from time to time.

Consistency is the keyword here because at the end of the day, this is what sets us apart from our competitors. We do not want to be a one-hit wonder."

for millennials who wish to grow their wealth. They can even withdraw from their EPF to invest in our fund, and at a minimum investment amount of just RM100, it's the perfect start-off fund.

Our two award-winning private retirement scheme (PIS) Funds are the OnePIS Conservative Fund and OnePIS Growth Fund.

PIS funds were conceptualised mainly to encourage Malaysians to save more for retirement because it's a well-known fact that many Malaysians don't have sufficient money to sustain themselves when they retire.

The OnePIS Growth Fund is targeted at those below 40, and what makes it attractive is its returns. The fund gave 14.25% in returns in just one year, and 25.2% for a 3-year period as at 30 June 2017. This averages to 7.70% per annum which is an attractive option for investors.

As for the OnePIS Conservative Fund, those 40 to 50 are our target market. For a 3-year period, the returns were at 14.48% as at 30 June 2017, on an average it's 4.83% a year, which is still higher than ID rates.

It's slightly lower than the PIS Growth Fund as we believe this being an individual's pensionisation stage, we shouldn't take a high risk approach when investing.

I am very proud that we have always been among the top-performing for the PIS Growth category with exception to its inception year.

There are 8 players in the category, and to be frank, we were the last kid on the block. But today, we are at the top spot garnering numerous awards, which amply means, we are on the right track!

*Source: Upper Investment Management



Other Related Articles:

Smart Investor (14 August 2017) – Fundsupermart.com Recommended Unit Trusts Awards 2017/2018

SPECIAL FOCUS
By Priya Rama

Fundssupermart.com Recommended Unit Trusts Awards 2017/18

The esteemed unit trusts awards is back with a bang yet again!



(top row, from left to right)
Dumli Chan, General Manager, Platform Services, iFAST Capital Sdn Bhd; Rudie Chan, Chief Investment Officer of Eastspring Investments Berhad; Goh Wee Peng, Acting Chief Executive Officer, AmlInvest; Sheila Halim, Chief Executive Officer of Amanah Mutual Berhad; Munirah Khairuddin, Chief Executive Officer of CIMB-Principal Asset Management Berhad; Eyzza Syazreen Zailan, Head of Fixed Income, Libra Invest Berhad; Terence Bong, Head, Intermediary Business Development, Nikko Asset Management Asia Limited; Daniel Choong, Managing Director & Head of Distribution (Malaysia), Aberdeen Islamic Asset Management Sdn Bhd; and Mohd Iftizan Mohd Nor, Deputy Chief Executive Officer of KAF Investment Funds Berhad.

(bottom row, from left to right)
Dennis Tan, Managing Director of iFAST Capital Sdn Bhd; Lee Shi Chuan, Regional Manager (Central Region), TA Investment Management Berhad; Wong Welyi, General Manager of Fundsupermart Malaysia; Dr Tan Chong Kosay, Chief Strategist/ Founder of Pheon Asset Management Sdn Bhd; Nik Mohd Hasyyudeen Yusoff, Chairman of Industry Development Committee, Federation of Investment Managers Malaysia; Ismitz Matthew, Executive Director/Chief Executive Officer of Kenanga Investors Berhad; Edwin Lee, Head of Partnership and Private Retirement Scheme (PRS), Manulife Asset Management Services Berhad; Ho Seng Yee, Chief Executive Officer of RHB Asset Management Sdn Bhd; and Jonathan Ng Wen Kai, Head, Partnership Business of Affin Hwang Asset Management Berhad.

Fundsupermart.com (FSM) held its annual Recommended Unit Trusts Awards to honour the unit trusts which have made it to FSM's Recommended Unit Trusts list for the 2017/18 period.

This year, they introduced 5 new categories, including 3 categories from the Private Retirement Scheme (PRS) segment. The awards include 36 unit trusts from 14 fund houses, including RHB Asset Management Sdn Bhd, Kenanga Investors Berhad, Eastspring Investments Berhad, AmlInvest, Aberdeen Islamic Asset Management Sdn Bhd, Affin Hwang Asset Management Berhad, and CIMB-Principal Asset Management Berhad which have made it into the list.

SmartInvestor | 08-2017 | 19

SPECIAL FOCUS
By Priya Rama

LIST OF WINNING FUNDS

CORE - EQUITY	
Category	Recommended Unit Trust
Core Equity - Global	Eastspring Investments Global Leaders MY Fund
Core Equity - Global (Islamic)	Aberdeen Islamic World Equity Fund
Core Equity - Developed Markets	CIMB-Principal Global Titans Fund
Core Equity - Global Emerging Markets	Eastspring Investments Global Emerging Markets Fund
Core Equity - Asia ex-Japan	CIMB-Principal Asia Pacific Dynamic Income Fund Affin Hwang Select Asia (ex-Japan) Opportunity Fund
Core Equity - Asia ex-Japan (Islamic)	CIMB Islamic Asia Pacific Equity Fund Pheim Asia Ex-Japan Islamic Fund
Core Equity - Malaysia	Kenanga Growth Fund Eastspring Investments Equity Income Fund
Core Equity - Malaysia (Islamic)	Eastspring Investments Dana al-Ilham Affin Hwang Aliman Growth Fund

FIXED INCOME	
Category	Recommended Unit Trust
Fixed Income - Malaysia (Short Duration)	AmlIncome Plus
Fixed Income - Malaysia	KAF Bond Fund Eastspring Investments Bond Fund RHB Bond Fund
Fixed Income - Malaysia (Islamic)	AMB Dana Arif Libra ASnitaBOND Fund

The surprise award was the "Investors' Choice - Fund House of the Year 2017" award, a new addition and the highlight of the Awards this year.

This award, voted by Fundsupermart.com's audiences, went to Kenanga Investors Berhad for the fund house's long-term investment strategy of rigorous stock-picking that continuously leverages on changing market conditions to identify attractive, off-benchmark stocks that may be undervalued relative to their peers.

The unit trusts are evaluated based on Performance, Risk and Expense Ratio. "These areas are what we believe a good unit trust should excel in. Only unit trusts with exemplary track records in these areas make it to our Recommended Unit Trusts list," said Wong Wei Yi, General Manager of Fundsupermart Malaysia.

Luminaries in the event included Chairman of Industry Development Committee of the Federation of Investment Managers Malaysia (FIMM), Nik Mohd Hasyudeen Yusoff who gave a keynote address as well as the representatives from the award-winning fund houses.

20 | SmartInvestor | 08.2017

LIST OF WINNING FUNDS

BALANCED	
Category	Recommended Unit Trust
Balanced - Asia ex-Japan	RHB Asian Income Fund
Balanced - Malaysia	Affin Hwang Select Balanced Fund Eastspring Investments Dynamic Fund
Balanced - Malaysia (Islamic)	Eastspring Investments Dana Dinamik Dana Makmur Pheim
SUPPLEMENTARY - REGIONAL	
Category	Recommended Unit Trust
Sub Regional Equity - Greater China	CIMB-Principal Greater China Equity Fund
Sub Regional Equity - Europe	TA European Equity Fund
SUPPLEMENTARY - SINGLE COUNTRY	
Category	Recommended Unit Trust
Single Country Equity - India	Manulife India Equity Fund
Single Country Equity - Singapore	Singapore Dividend Equity Fund
SUPPLEMENTARY - SECTOR	
Category	Recommended Unit Trust
Sector Equity - Global Resources	Commodities Equity
Sector Equity - Malaysia Small to Medium Companies	KAF Vision Fund
SUPPLEMENTARY - FIXED INCOME	
Category	Recommended Unit Trust
Fixed Income - Asia	RHB Asian Total Return Fund Affin Hwang Select Bond Fund
Fixed Income - Emerging Markets	RHB Emerging Markets Bond Fund
Fixed Income - Malaysia with Foreign Exposure	AmDynamic Bond
PRIVATE RETIREMENT SCHEME (PRS)	
Category	Recommended Unit Trust
Private Retirement Scheme - Conservative	Kenanga OnePRS Conservative Fund
Private Retirement Scheme - Moderate	Affin Hwang PRS Moderate Fund
Private Retirement Scheme - Growth	Kenanga OnePRS Growth Fund

SmartInvestor | 08 . 2017 | 21

