



MAKE YOUR MONEY WORK FOR YOU WITH OLD MUTUAL UNIT TRUSTS

WHAT IS A UNIT TRUST?

A UNIT TRUST IS A POOL OF SAVINGS BY MEMBERS OF THE PUBLIC.

Unit Trusts provide a much safer method of investing.

WHY UNIT TRUSTS?

- They outperform Bank Deposits over time
- They allow the opportunity to invest in different asset classes that would not have been possible when going direct
- They allow you to have a qualified Fund Manager who ensures your investment is high performing and risk adverse
- They are ideal for Preserving Capital and Growing Assets

OLD MUTUAL SWAZILAND CURRENTLY OFFERS INVESTORS TWO TYPES OF UNIT TRUST FUNDS:

1. BALANCED FUND

The Old Mutual Balanced Fund offers investors long-term capital growth. It invests across Equities, Bonds and Cash offering long term value. This fund is ideal for those wanting moderate to high, long-term capital growth. It is suitable as a stand-alone retirement investment.

Key features include:

- An upfront once-off administration fee of 2% for individuals
- Distributions are declared half yearly – June and December
- The monthly fund minimum is E500 for individuals or a minimum lump sum of E10 000 for both individuals and corporates
- Investors have access to an online view of their investment portfolio
- The fund is managed by Old Mutual Investment Group (OMIGSA) – Macro-Solutions



DO GREAT THINGS EVERY DAY

2. ENHANCED MONEY MARKET FUND

The Old Mutual Swaziland Enhanced Money Market Fund has been designed specifically for the investor who wants a liquid investment that delivers a regular income with capital protection.

It aims to deliver regular income and to outperform bank deposits over time, while preserving capital.

Key features include:

- There are no upfront fees.
- Interest is declared daily and paid on the first business day of every month.
- The monthly fund minimum is E1 000 for individuals OR a minimum lump sum of E10 000 for both individuals and corporates.
- Zero percent initial administration charge.
- Investors have access to an online view of their investment portfolio as and when they need to.
- The fund is managed by Old Mutual Investment Group (OMIGSA) – Futuregrowth Asset Management.

CONTACT US

FOR MORE INFORMATION, PLEASE CONTACT US:

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Terms and conditions apply