

OLDMUTUAL



ENJOY SAFETY IN NUMBERS WITH OLD MUTUAL UNIT TRUSTS



DO GREAT THINGS EVERY DAY

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
- Turnaround time is three working days (72 hours)
- They allow you access to qualified and experienced Fund Managers who ensure 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 is a solution for investors wanting moderate to high long-term growth, with less volatility in the short term than pure equity. It is also suitable as a stand-alone retirement investment.

Key features include:

- An upfront once-off administration fee of just 2% for individuals
- Distributions are declared twice a year - June and December
- Since inception, the Old Mutual Balanced Fund has consistently outperformed the benchmark (CPI)
- The monthly fund minimum is E250 for individuals or a minimum lump sum of E250
- Investors have access to an online view of their investment portfolio
- The fund is managed by Old Mutual Investment Group (OMIGSA) - Macro-Solutions
- A minimum of 50% of the fund is invested in Eswatini and the composition of assets and their respective proportions meet retirement fund requirements

● 2. ENHANCED MONEY MARKET FUND

The Old Mutual Swaziland Enhanced Money Market Fund has been designed specifically for the investor who wants a low-risk liquid investment that offers short to medium-term capital growth. It aims to deliver regular income and outperform bank deposits over time, while preserving capital. While this fund offers maximum capital protection, investors recognise that their investment is unlikely to keep pace with inflation over the long term.

Key features include:

- There are no upfront fees
- All gains are declared daily and interest is reinvested (compounded) monthly
- For individuals, the monthly fund minimum is E250 or a minimum lump sum of E1000.
- It can be used as a safe haven during times of stock market turbulence or to reduce timing risks by phasing a lump sum into the stock market over time
- 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:

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Find us in Mbabane and Manzini. Terms and conditions apply

