

BEST UNIT TRUST FUND AWARD

COMMENDATIONS

- Many fund managers have adopted new forms of technology for digital transactions with new tools and apps developed for customer interaction. Awareness creation via social media platforms aimed at younger investors is encouraging.
- Fact sheets of the fund managers carry opinions and insights into Capital Markets.
- Trilingual communication by some funds.
- Shift towards a greater base of retail investors as a result of marketing campaigns, as well as low value entry requirements.

AREA OF IMPROVEMENT

- Certain companies had incomplete information in the public domain, especially missing documents on factsheets, annual reports, interim reports, and KIIDs.
- Lack of benchmarks in some funds. Benchmarks help investors understand in what ways fund managers create value through active investing.
- Disclosure of risk management and compliance procedures more clearly is essential to improve investor confidence.
- Certain firms' websites remain difficult to navigate and locate relevant information. This proves to be a problem in providing an impactful experience to investors.