Not a Fan of Unit Trust?

INVEST IN PHILLIP MANAGED ACCOUNT AND RECEIVE S$100*

(EXCLUSIVE TO ISCA MEMBERS ONLY)

WHAT IS MANAGED ACCOUNT?

Are you finding it challenging to actively manage your wealth due to time constraints? Have your busy schedule and other commitments hindered your ability to meet your investment goals? Unlock the potential of our investment expertise with three straightforward steps. Our Portfolio Managers are here to assist you in gaining control of your investments and fostering the growth of your wealth over the medium to long term through discretionary management.

PHILLIP GLOBAL PERSPECTIVE PORTFOLIO

With **Phillip Global Perspective Portfolio**, you can create and grow your Nest Egg with a minimum investment of $50,000. This discretionary managed account service ("Account") primarily invests in equities listed on major stock exchanges, catering to investors seeking a medium to long-term horizon of 3 to 5 years.

The account aims to invest in equities with large global businesses whose competitive advantages are difficult to replicate. In managing downside risks, the Account may invest into unit trusts, exchange-traded-funds and money market funds (including MMFs managed by related companies). The typical portfolio comprises 10 to 20 holdings.

Features of Managed Accounts:

- Active management of your portfolio in changing market conditions to ensure your investment objectives stay on track.
- Minimum investment amount starting from SGD 50,000 (with cash or existing investments in shares/unit trust).
- Direct ownership of stocks in your name.
- No withdrawal restrictions, no lock-in period, and no termination fees.
- Full listing of your portfolio holdings available through 24x7 online access and monthly statements.
- You can monitor your investments in real-time by logging onto our Phillip MyWealth App.

MANAGEMENT FEE:

Below S$150,000	**: 1.50% p.a.**
S$150,000 to S$1,000,000	**: 1.35% p.a.**
Above S$1,000,000	**: 1.20% p.a.**

For details on fees and charges, please refer to the Discretionary Account Management Agreement and its accompanying Schedule.

FOR MORE INFORMATION, CONNECT WITH US :

We are a group of financial adviser representatives representing Phillip Securities.

Whatsapp or SMS : 888-700-70

jc@phillip.com.sg

Terms & Conditions*

- Promotion period will be from **1 Jan 2024 to 31 Dec 2024**, both dates inclusive ("Promotion Period").
- This promotion is exclusive to ISCA Members opening a new Phillip Global Perspective Portfolio (PGPP) Account.
- The vouchers will only be paid out after the customer opens the PGPP Account with a minimum $50,000 and keeps it invested for the next 3 months.
- The payout is a one-time S$100 CapitaVoucher, which will be sent to the customer at the end of the third month from the date of account opening.
- Notwithstanding anything herein contained, PSPL reserves the right at any time in its absolute discretion to (i) amend, add and/ or delete any time of these Terms & Conditions without prior notification (including eligibility and qualifying terms and criteria),and all participants shall be bound by such amendments, additions and / or deletions when effected, or (ii) vary, withdraw, or cancel any items or the promotion without having to disclose a reason thereof and without any compensation or payment whatsoever. PSPL's decision on all matters relating to the promotion shall be final and binding on all participants.
- By taking part in this promotion, the customer acknowledges that he/she has read and agreed to these Terms & Conditions.
- This material and information herein is provided by Phillip Securities Pte Ltd ("PSPL") for general information only and does not constitute a recommendation. It does not have any regard to your specific investment objectives, financial situation and any of your particular needs. You should assess and consider whether the discretionary managed account ("MA") service is suitable for you before proceeding to invest.
- You may wish to consult a qualified financial adviser before investing. Investments in discretionary MA managed by PSPL are not suitable for short-term speculation and are subject to investment risks including the possible loss of the principal amount invested. There can be no assurance that investment objectives will be achieved. Past performance is not necessarily indicative of future performance. Our financial adviser ("FA") representatives may be authorised to engage in non-FA activities of marketing, client acquisition and client servicing of MA services.
- Our representatives who are appointed under the Securities and Futures Act to conduct fund management activity ("FM Reps"), i.e. the Portfolio/Fund Managers, will be managing clients' money and investments, in addition to marketing, client acquisition and client servicing of MA services. Terms and conditions ("T&C") of PSPL discretionary MA services shall apply.
- This advertisement has not been reviewed by the Monetary Authority of Singapore.