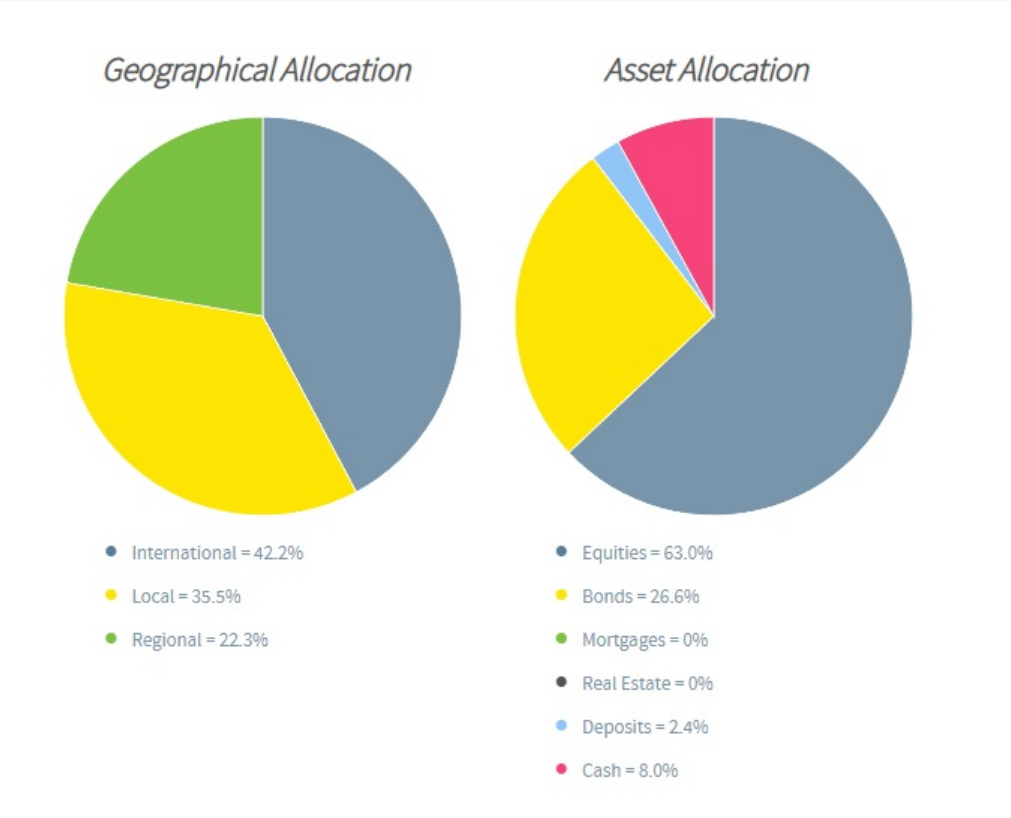
overview

The Sagicor Global Balanced Fund is the first Barbados based global fund, offering investors the opportunity to invest in international, regional and local securities. The fund combines the experience of our experts with over 175 years of successful business practices and sound investment policies, with internationally renowned investment managers Morgan Stanley and Oppenheimer, to provide an exceptional product.

INVESTMENT OBJECTIVE
The objective of the Fund is to achieve income and long-term capital appreciation through investment in a diversified portfolio of shares, stocks and bonds listed on the main Caribbean and international stock exchanges. Use the shareholder access link above to log into the site to review the status of your account, or request a statement using our online form.

If you are interested in becoming a shareholder in the SGBF or require more information about the fund, please contact us.



Top 5 Investment Holdings
Goddard Enterprises Limited
Government of Barbados 2020 Bond
MS Global Infrastructure Fund
Massy Holdings Limited
Government of Barbados 2020 Bond

forms

Individual Mutual Fund Application Form

Individual Mutual Fund Redemption Form

related products

Preferred Income Fund

The Preferred Income Fund is a mix of regional and international fixed income securities and preferred shares. The diversity of the holdings ensures security, while the regional and global opportunities give it the potential for higher returns.

Select Growth Fund

The Select Growth Fund is suitable for investors who are seeking long-term growth but are concerned about moderating the risk associated with being invested in stocks at all times.