

# overview

Investing in US dollar funds is a great portfolio, and now the Sagicor Sigma USD Fund investment options. These offer great returns and the strength of the US dollar.

Investing in the Sagicor Sigma Global Funds is affordable for all, so start building your wealth now.

## Fund Portfolios

Build a portfolio of funds to meet your specific investment needs based on the investment objective and make-up of the Sigma portfolios

| PORTFOLIO                            | INVESTMENT OBJECTIVE  | INVESTMENT MAKEUP   |
|--------------------------------------|---|---|
| Sagicor SIGMA Global Markets (USD)   | Take advantage of this unique way to invest internationally. Suitable for investors with a low to moderate risk tolerance who are seeking stable investments. | You can benefit from: • A diversified portfolio invested in global markets • Exposure to international equity and bond markets  |
| Sagicor SIGMA Global Equity (USD)    | This is largely an equities portfolio with fixed income instruments to provide liquidity.   | You can benefit from: • Returns in line with S&P 500 • Exposure to international equity markets • Some liquidity while saving for long term goals                                       |
| Sagicor SIGMA Global Corporate (USD) | This is a fixed income portfolio invested mainly in global corporate and sovereign debt securities.   | You can benefit from: • Returns above the USTreasury 10-year yield • Exposure to attractively priced global corporate and sovereign securities • Gains from investment grade corporates |
| Sagicor SIGMA Global Protector (USD) | This is a fixed income investment fund that provides liquidity for unit   | Advantages include: • Easy access to funds • Ideal for the cash component of  |

|   |   |  |
|---|---|--|
|   | holders.  | your portfolio •<br>No minimum<br>holding period   |
| Sagikor SIGMA<br>Global Income<br>(USD) | Investing is<br>affordable and<br>convenient to help<br>you generate<br>income, liquidity<br>and preserve<br>capital over the<br>short to medium<br>term. | Advantages<br>include: • Gains<br>distributed<br>monthly by way of<br>bonus units or<br>cash payouts •<br>Quick and easy<br>access to invested<br>funds payout with<br>no minimum<br>holding period. |
| Sagikor SIGMA<br>Global Bond (USD)      | This is a fixed<br>income portfolio<br>largely invested in<br>sovereign debt.   | Advantages<br>include: •<br>Attractive yield •<br>Exposure to<br>regional sovereign<br>bonds • Funds are<br>accessible   |

# benefits

## Sagikor Carib Global Fund Facts

- Sagikor Carib Global Fund was registered in Trinidad and Tobago on May 25, 2020.

### How Does Sagikor Carib Funds Work?

Sagikor Carib Global Fund provides you with the flexibility of investing in an individual portfolio or a combination of portfolios, depending on your investment objectives. The value of these investments may change from day to day, and are valued at the prices prevailing at market close. Units are valued each business day and are published on our website.

## Management

- Our professional Fund Managers select the best investments to include in each portfolio with the aim of outperforming the established benchmarks.

## Flexibility

- Unit holders have full access to their funds at any time.

## Diversification

- Investors in Sagikor Carib Global Fund benefit from diversification within and across asset classes to manage risk.

## Protection

- The Trustee ensures that the Unit Trust operates in accordance with the Trust Deed as specified by the Collective Schemes

## Transparency

- Prices are published daily on our website. Statements are also produced quarterly or upon request, so you may monitor the performance of your investment.

## Accessibility

- With a minimum investment of \$100, Sagicor Carib Funds is the most affordable unit trust available in Trinidad and Tobago

# apply

Investing with Sagicor Investments is easy! You can apply right now online, print an application and email it to us, or request that an investment kit be sent to you.

### 1. **Open Online**

Using our secure online account application, you can get started right away! Click here to begin your online application. (Insert link to online application HTML form)

### 2. **Send via email**

Download an application. Simply fill it out and email it back with your initial investment advisor or send it to our channel rep.

Choose your application:

- CIF form
- Account Application (for individual, joint and all other account type)

### 3. **Request an investment kit**

If you would prefer to receive our investment kit or request a call from us click here.