

One home for all your investment needs

At Irish Life we are committed to delivering the best range of investment choices to brokers. We recognise that your clients have varied needs and different preferences when it comes to investing for their pensions, investments or savings goals. Our objective is to match our offerings with your clients' investment needs.

**INTRODUCING
EXCITING NEW FUNDS**

For financial brokers only





Investing can seem like a maze sometimes with so many funds to choose from

We want to make it easy for your clients to invest by delivering meaningful choice with a range of carefully selected solutions from our four market leading investment manager partners.

With our investment solutions your clients can choose to select their own investments from our range of over 80 funds or choose diversified ready-made portfolios from our multi-asset fund ranges across a range of different risk profiles.

Our range of options includes:

- > multi-asset
- > equity (both indexed and active)
- > fixed income
- > property
- > commodities
- > alternatives
- > cash and
- > other specialist funds.

We also offer responsible investment options throughout our range of funds.

Our funds are managed by four market leading multiple award-winning fund managers who have dedicated teams of experts on hand across the world to uncover the best investment opportunities around the world.

Ready-made diversified portfolios

Multi-asset funds are now the most popular choice for investors. They give diversified investment exposure across different types of assets providing access to a range of opportunities in single, professionally constructed and managed portfolios.

In 2013 we introduced our flagship multi-asset investment offering MAPS to the broker market. In early 2020 we launched a range of bespoke multi-asset funds built specifically for Approved Retirement Fund (ARF) investors with our Retirement Portfolios (REPS). REPS were the first of their kind in Ireland designed and built around the very specific needs of retirees.

New range of Multi-Asset Fund options

We are now delighted to add to those options with our new FORUM , SAMA and Amundi Protect 90 funds delivered for your clients at a cost-effective price

FORUM Funds

- > The FORUM range comprises three funds, tailored to meet your clients' risk profiles, from FORUM 3 to FORUM 5.
- > FORUM invests across a range of assets, regions, sectors and currencies to provide diversification, using index strategies for efficiency.
- > The FORUM funds combine ILIM's globally recognised indexation expertise and multi-asset skills all managed within a responsible investing framework. The fund is designated Article 8 status under SFDR.
- > FORUM funds will appeal to investors who want to maintain a consistent exposure to global investment markets by staying invested in different market environments.
- > FORUM funds are available at Irish Life's standard annual management charge.

Setanta Active Multi Asset Funds

- > The Setanta Active Multi Asset (SAMA) fund range apply Setanta's renowned active approach of deep research and high conviction to a multi-asset range.
- > The SAMA range comprises three actively managed portfolios that hold a combination of equities, bonds, property, cash and alternatives. Each fund has a different risk and return profile to suit your clients' risk tolerance from SAMA 3 to SAMA 5.
- > SAMA funds are managed by a highly experienced, stable and award-winning team, averaging 20 years investment experience. As dedicated value managers, Setanta employ a clear and consistent investment philosophy.
- > Setanta integrates ESG factors into its fundamental research process and SAMA funds are designated "Article 8" under SFDR.
- > SAMA funds are available at Irish Life's standard annual management charge.

Amundi Protect 90

- > The Amundi Protect 90 (P90) fund seeks to balance the search for returns with downside protection. The fund is an actively managed multi-asset fund aiming to provide investment growth when markets are performing well while delivering 90% protection if markets fall.
- > P90 is a broadly diversified multi-asset fund using a flexible and dynamic approach across a range of equities, bonds and money market instruments.
- > Amundi are Europe's largest asset manager with more than €2tn in assets under management and the market leader in structured solutions, managing €79bn of assets.
- > Amundi is a pioneer in responsible investing and integrates ESG criteria into its investment process and the P90 fund is designated "Article 8" under SFDR.
- > The Amundi P90 fund is available at 0.60% above Irish Life's standard annual management charge on a range of products.



Proven solutions over your clients' life cycle

We believe that these new fund options alongside our existing offerings now give your clients even more choices to meet all of their investment needs at Irish Life.



Global Coverage, Local Expertise - Our Global Investment Managers



- > Global Asset Manager with over **75 years** investment experience
- > **Proven track record** in designing and delivering multi-asset solutions



- > Ireland's leading active fund manager
- > **Dedicated value investors**



- > Global active investment manager
- > **High conviction with focus on bottom-up independent research**



- > Europe's largest fund manager and globally in the Top 10
- > **Heritage in Responsible Investing** 30 years with **€800bn** + in client assets in ESG funds



For more information about our fund options please contact your Account Manager