



STRATEGIC AND DISCIPLINED INVESTMENT THROUGH REGULAR INVESTMENT AUTHORISATION (RIA)



PUBLIC MUTUAL
WHOLLY-OWNED SUBSIDIARY OF PUBLIC BANK

What is Regular Investment Authorisation (RIA)?

RIA is a request for regular switching of a specific amount of units from a bond/money market fund into an equity/mixed asset/balanced fund at selected intervals and frequency.



Benefits of RIA:



INVEST REGULARLY WITH EASE



EXECUTION CAN BE DONE 24/7 VIA PMO



**REQUIRES ONLY A MINIMUM OF
RM1,000 PER SWITCH**



**A DISCIPLINED INVESTMENT
APPROACH TOWARDS ACHIEVING
YOUR LONG-TERM FINANCIAL GOALS**

How to Register RIA?



1. Login to PMO

Public Mutual Online

2. Under Switch/Withdrawal tab, select "Regular Investment Authorization"

3. Click on "Proceed to Register New RIA"

4. Select a 'Switch-from' account

- Must be an existing Bond or Money Market account

5. Select a 'Switch-to' fund

- Must be an Equity/Balanced/Mixed Asset Fund

6. Investor to specify:

- Amount to be switched out (minimum RM1,000)
- Switching interval (monthly, quarterly etc)
- Frequency of switching (e.g: 6 times, 12 times etc)

Terms & Conditions apply.

Get In Touch with Us



Unit Trust Consultant



Public Mutual Branch/Customer Service Centre



03-2022 5000



www.publicmutual.com.my

什么是定期投资授权(RIA)?

RIA是一项定期在特选的时间间隔与频率将特定单位数额从债券/货币市场基金转换至股票/混合资产/平衡基金的要求。



RIA 的好处:



轻松地定期投资



可 24 小时全天候通过 PMO 执行 RIA



每项转换最低只需 1,000 令吉



通过纪律性的投资方式来实现您的长期财务目标

如何申请RIA?



1. 登陆大众信托基金线上服务 (PMO)

Public Mutual Online

用户身份

密码

取消

登录

2. 在‘转换/赎回’标签页下，选择‘定期投资授权’

3. 点击‘继续以注册新定期投资授权’

4. 选择一项‘转从’账户

– 必须是一项债券或货币市场基金账户

5. 选择一项‘转至’基金

– 必须是一项股票/平衡/混合资产基金

6. 投资者将指定:

– 转换数额 (最低为 1,000 令吉)

– 转换间隔 (每月、每季等)

– 转换频率 (例如: 6 次、12 次等)

须符合条例与规则。

请联系我们



单位信托顾问



大众信托基金分行/客户服务中心



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Apakah Kebenaran Pelaburan Tetap (RIA)?

RIA adalah permohonan penukaran secara berkala untuk jumlah unit tertentu daripada dana bon/pasaran wang ke dalam dana ekuiti/aset campuran/imbang pada selang masa dan kekerapan yang dipilih.



Kelebihan RIA:



KEMUDAHAN UNTUK MELABUR SECARA BERKALA



PELAKSANAAN BOLEH DILAKUKAN 24/7 MELALUI PMO



HANYA MINIMUM RM1,000 DIPERLUKAN UNTUK SETIAP TUKAR GANTI



PENDEKATAN PELABURAN YANG BERDISIPLIN KE ARAH MENCAPAI MATLAMAT KEWANGAN JANGKA PANJANG ANDA

Bagaimanakah untuk mendaftar RIA?



1. Log masuk ke PMO

Public Mutual Online

	
	
Clear	Login

2. Di bawah tab Tukar Ganti/Penebusan, pilih “Kebenaran Arahan Tetap”

3. Klik pada “Teruskan Mendaftar RIA Baharu”

4. Pilih Akaun ‘Tukar Ganti-Daripada’

- Ia mestilah akaun Dana Bon atau Pasaran Wang yang sedia ada

5. Kemudian pilih dana baharu di ‘Tukar Ganti-Kepada’

- Ia mestilah Dana Ekuiti/Imbang/Aset Campuran

6. Pelabur perlu menentukan:

- Jumlah yang hendak ditukarkan (minimum RM1,000)
- Selang masa tukar ganti (bulanan, suku tahunan atau lain-lain)
- Kekerapan tukar ganti (contoh: 6 kali, 12 kali atau lain-lain)

Tertakluk pada Terma & Syarat.

Hubungi Kami



Perunding Unit Amanah



Cawangan/Pusat Khidmat Pelanggan Public Mutual



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Mutual Gold Centre

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