

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



03-222 5000



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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.



Bagaimanakah untuk mendaftar RIA?



1. **Log masuk ke PMO**

Public Mutual Online

Clear	Login

2. **Di bawah tab Tukar Ganti/Penebusan, pilih “Kebenaran Pelaburan 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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1 Utama Shopping Centre

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