



ENWEALTH CAPITAL LIMITED



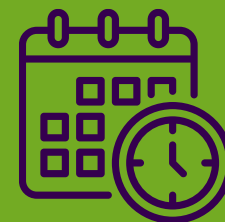
Enwealth Capital Unit Trust Scheme Funds



Enwealth Balanced Fund



Enwealth Equity Fund



Enwealth Money Market Fund



Enwealth Dollar Money Market Fund



Enwealth Fixed Income Fund

Enwealth Money Market Fund

Investment Objectives :

Reasonable level of Passive income,
Steady growth through compounding of Interest earned
Capital Preservation
Liquidity

Fund Features :

Risk Profile : Low

Investment Horizon : Short Term – Minimum 1 month

Suitability: Investors with low risk appetite and High liquidity needs
(Individuals, students, Chamas, Saccos, Corporates)

Funds Invested In: Money Market securities – Call & Fixed Deposits, Treasury Bills

Costs:

Min Initial Investment: Kshs 500

Annual Management Fee: 2% p.a

Withholding Tax on Interest : 15% (Unless Exempted)

Initial Fee: Nil

Enwealth Money Market Funds



KSH	USD
12.50%	4.48%

Effective Annual Rate
as at 13th February, 2025

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Past performance should not be used as a guide to future investment performance

Enwealth \$ Money Market Fund

Investment Objectives :

Reasonable level of Passive income,
Steady growth through compounding of Interest earned
Capital Preservation
Liquidity

Fund Features :

Risk Profile : Low

Investment Horizon : Short Term – Minimum 3 months

Suitability: Investors hedging from the Forex volatility ;
Exposure to USD denominated investments

Funds Invested In: High-quality money market securities denominated in U.S. dollar
maturity not exceeding one year.

Costs:

Min Initial Investment: USD 500

Annual Management Fee: 2% p.a

Withholding Tax on Interest : 15% (Unless Exempted)

Initial Fee: Nil

Enwealth Money Market Funds



KSH	USD
12.50%	4.48%

Effective Annual Rate
as at 13th February, 2025

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Enwealth Balanced Fund

Investment Objectives :

Reasonable level of Passive income,
Long term stability and capital growth
Dividends
Partial Liquidity

Fund Features :

Risk Profile : Low To Moderate

Investment Horizon : Medium Term – Minimum 1 Year

Suitability: Investors with Medium risk appetite and desire to save and grow assets while earning a competitive income yield.

Funds Invested In: Fixed Deposits, Treasury Bills, Treasury Bonds and shares (Max: 60%)

Costs:

Min Initial Investment: Kshs 500

Annual Management Fee: 2% p.a

Withholding Tax on Interest : 15% (Unless Exempted)

Initial Fee: Nil

Enwealth Balanced Fund

2024 Return

20.3%

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DISCLAIMER

The return quoted is net of management fees. Past performance is no indication of future performance as price of units may rise or fall.

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Enwealth Equity Fund

Investment Objectives :

Long Term Capital Growth,
Dividends
Maximize Returns Over The Long Term

Fund Features :

Risk Profile : Moderate To High

Investment Horizon : Long Term – Minimum 3 Year

Suitability: Investors with High risk appetite and low liquidity (cash) needs.

Funds Invested In: Equities/Stocks (Max 80%) and Money Market Securities

Costs:

Min Initial Investment: Kshs 500

Annual Management Fee: 2% p.a

Withholding Tax on Interest : 15% (Unless Exempted)

Initial Fee: Nil

LOOKING FOR LONG TERM
CAPITAL GROWTH
WHILST EARNING
A DIVIDEND?

Enwealth Equity Fund
2024 Return

34.6%

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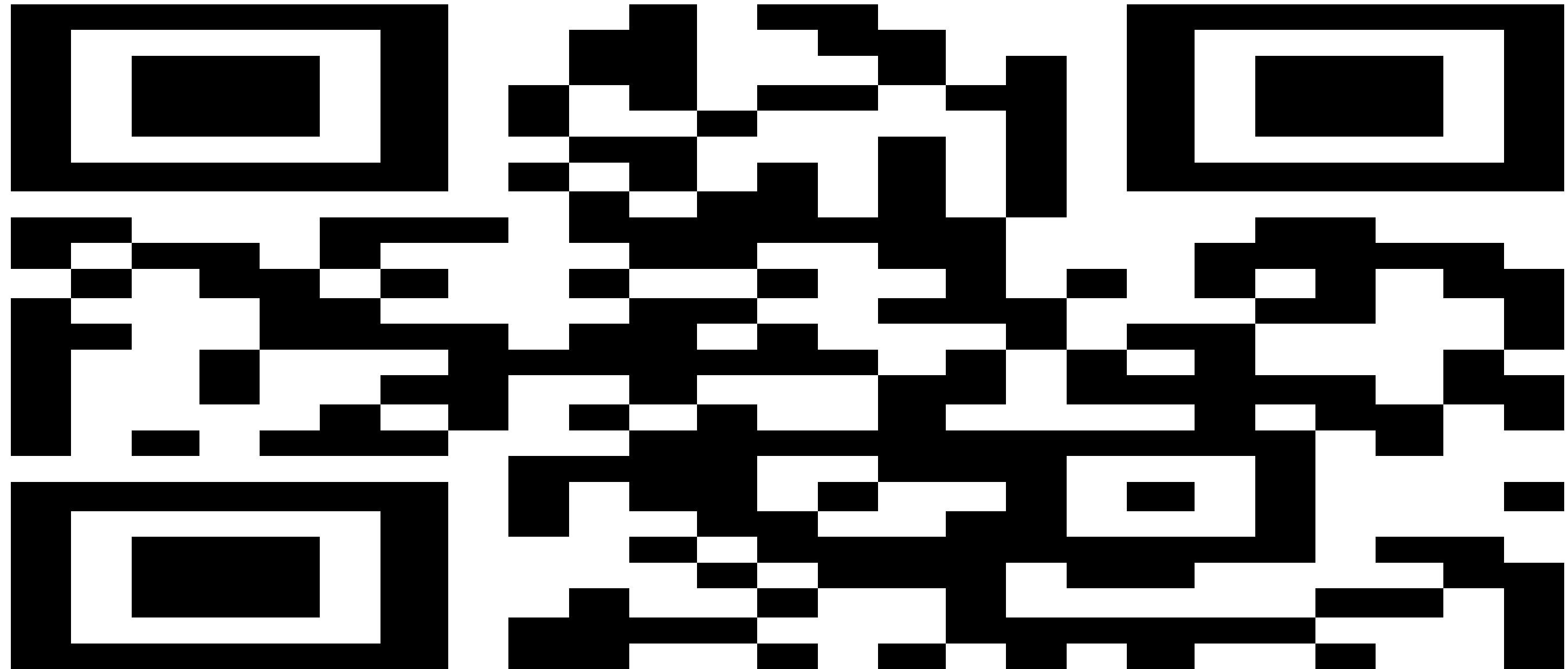
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