

#MakeItMutual

Season Two

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- **#MakeitMutual** Season One launched in May 2017
- Created to introduce Filipino millennials to mutual fund and how investing could help them achieve their life goals.

#MakeItMutual Season One



Introduction: #MakeItMutual with Sun Life!



Episode 1: What are Mutual Funds? #MakeItMutual



Episode 2: Choosing the Right Fund #MakeItMutual



EPISODE 3: How to beat inflation #MakeItMutual



Episode 4: Investing Regularly #MakeItMutual

brighter  life





#MakeItMutual Season One

- Effectively engaged Filipinos via digital, based on impressions, reach, and views on Facebook and Google
- Recognized with a Gold Quill Award of Merit in Montreal, Canada
- SLAMCI saw increase in new SLAMCI accounts among millennials (24-35 age range), marking a 62.6% year-on-year increase

Market is sizeable and continuously growing

(amounts in Php B)

	2010	2019	Annualized Growth
TDs*	605.06	2,943.88	19%
UITFs	124.46	562.682	18%
MF Total**	95.68	284.14	13%
SLAMCI	19.37	79.51	17%
Market share	20%	28%	

- Despite declining interest rates given by banks, TDs still grew 20% p.a. and market is nearly three trillion pesos
- UITFs & SLAMCI's growth approximated that of TDs'

*plus LTNCD in 2019

NOTE: 2019 figures for TDs is as of Nov and UITF as of Sept

**Based of PIFA Dec 2019 report

SLAMCI FUNDS ANNUALIZED RETURNS

(as of Dec 27, 2019)

Fund Name	Launch Date	Annualized Since Inception
Bond	04/05/00	5.81%
Balanced	04/05/00	7.35%
Equity	04/05/00	7.84%
Money Market	07/01/04	1.87%
GS	03/01/05	4.18%
Dollar Advantage	07/02/02	4.09%
Dollar Abundance	03/01/05	3.54%
Dynamic	07/01/14	0.76%
Dollar Wellspring	05/05/16	4.13%
World Voyager	05/05/16	9.20%
Dollar Starter	11/06/17	1.71%

SLAMCI Investors* at a Glance

- 145,700 unique investors
- 66% Female; 34% Male
- Mostly Gen X and Millennials
- Mostly invested in aggressive funds: Equity (28%) Index (22%)
- 80% have been investing for less than 10 years

Post-Millennial (0 to 19)	0.2%
Millennial (20 to 35)	31%
Gen X (36 to 55)	47%
Boomers (56 to 74)	19%
Silent (75 & up)	3%

**As of January 23, 2020*



While there has been progress...

There is still much left to do.

The Filipinos' Financial Challenges at the Moment



40%

cannot save for future expenses



31%

no money for unplanned expenses/emergencies



29%

source of income is not enough to provide for my family's financial needs

Source: SOLAR 2019 / 1,000 respondents nationwide
ABC market / Kantar Milward Brown

The Filipinos' Financial Goals



59%

to have money to provide for my family's everyday needs



52%

to have money in case of emergencies (health-related or otherwise)



49%

to have extra money to help other members of my family that need help

How Do Filipinos Prepare for These Concerns?



62%

manage
their
finances



54%

spend only on
planned
purchases



39%

invest
money



Amid all these...
There is hope!

The Bright Spot: Interest in investing continues to grow among millennials and the middle class.

21.5%

of stock market
investors
were aged 19 to 29

43.1%

of stock market
investors
were aged 30 to 44

62.4%

of stock market
investors
earn less than
P500,000

Source: PSE Stock Market Investor Profile Report 2018

The Bright Spot: The Philippines is ripe for a shift into a digital financial landscape.

91%

searched online for a product or service to buy

92%

visited an online retail store

75%

purchased a product or service online

Source: Source: Hootsuite/We Are Social 2019

On its 20th anniversary, SLAMCI wants to:

- Instill in Filipinos a long-term mindset when it comes to making financial choices
- Present Sun Life as a partner to prosperity, as we've made investing accessible and affordable

A low-angle, upward-looking photograph of several tall skyscrapers against a dark blue night sky filled with stars. The buildings are silhouetted and their windows are faintly lit, creating a sense of height and urban density. The overall tone is professional and aspirational.

This 2020, the time is right for
#MakeItMutual Season Two

#MakeItMutual Season Two aims to:

- Engage the viewer through relatable and shareable content
- Encourage people to start investing by helping determine one's risk profile and by offering affordable fund products
- Empower people to commit to their financial goals through tools that enable investing regularly and conveniently

#MakeItMutual
Season Two

Featuring
SLAMCI Brand Ambassador

MATTEO
GUIDICELLI



#MakeItMutual Season Two

will perfectly complement Sun Life's other tools and initiatives.

INVESTmentality

An online quiz to find out what type of investments best suit you.

Auto Invest



Add monthly or quarterly to your investments automatically.

Investing Online



Investment Calculator

See how your money can grow over time using various financial instruments.

#MakeItMUTUAL Season Two

Coming Soon!



20TH

ANNIVERSARY



Sun Life

Asset Management