

MONETA expands its investment portfolio with a new partner J&T and their two funds. It will allow investing in corporate bonds and Central European equities

Prague, 20 November 2023

MONETA Money Bank is adding two new investment funds to its investment spectrum, J&T Opportunity and J&T Bond, primarily focused on Central European equities and corporate bonds. These fall under J&T Investiční společnost, which has been active on the market for 25 years and manages assets in excess of CZK 100 billion. As of 20 November, the bank's clients can choose from 44 investment funds.

The first new product offered by the bank since 20 November is the J&T Opportunity equity fund. The fund primarily focuses on investments from the Central European region, which are complemented by selected stocks from global markets. The fund monitors current domestic and foreign trends, thanks to which it is able to compile an attractive mix of stocks from around the world, including the Czech Republic. *"The aim is to provide a long-term return that significantly exceeds not only the level of more conservative bond funds, but also equity indices and competing equity funds. The recommended investment horizon for this fund is 5 years or more,"* said Tomáš Kapoun, product team manager of investments at MONETA Money Bank.

The second fund is J&T Bond investing in high-quality corporate bonds, which are complemented by a mix of government bonds. *"The main driver of the fund's value growth is mainly medium-term bonds, which are complemented by a mix of short and long maturities, thus creating the potential for very interesting returns with the possibility of risk diversification,"* commented Tomáš Kapoun. The recommended investment horizon for this fund is 3 years.

The funds from J&T Investiční společnost will be appreciated by more dynamic investors who prefer an active approach in their management. In general, they can be used for both one-off and regular investments. The minimum investment in both funds is CZK 500.

MONETA offers investment in 44 investment funds, both in euros and crowns, and in the whole spectrum of investment typologies: from conservative to very dynamic. Investing can be arranged at any MONETA Money Bank branch or in internet banking and the Smart Banka mobile app.

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MONETA Money Bank, a.s., which is the controlling person of MONETA holding, is a leading independent Czech bank, servicing clients through its nationwide branch network. The bank has been traded on the Prime Market of Prague Stock Exchange since 2016. The bank has focused on retail and SME oriented business model with a strong position in the consumer and agriculture segments. In addition, the bank provides customers with insurance products and investment funds. MONETA serves more than 13% of the Czech population via an omni-channel distribution strategy which includes 153 branches and 563 ATMs, a market-leading digital banking platform, a call center, auto dealers, building society and mortgage bank, brokers and leasing partners.

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Disclaimer: "Historical performance is not an indicator of future performance. The value of an investment can go down as well as up. Return on investment is not guaranteed. The funds displayed may be outside your target market. Source: MONETA Money Bank, a.s. Reference period: five consecutive years of performance shown in the marketing communication. This is not an offer to enter into a contract with the Bank or an offer to invest or an investment recommendation. A condition for investing is the completion of the Investment Questionnaire, reading the Statutes and the Key Information Disclosure. For more information visit moneta.cz.

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