



INVESTORS TRUST

# Investors Trust

a world of investment opportunities

### Who we are

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**Investors Trust** is the global brand representing the **ITA Group**. **ITA Group** is an **international group of insurance companies and subsidiaries** located in multiple jurisdictions around the world which aim to supply investors with access to the **global markets** through an array of **unit-linked investment products**.

- Incorporated in **2002**
- Approximately **100,000 clients** around the globe
- **USD 3.5 billion assets** under management
- Servicing clients in more than **100 countries** through global affiliates

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# Opportunities, Challenges & Dilemmas Facing Middle East advisers in 2023

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**Rank the top 3 biggest  
Challenges facing Insurance  
companies in the Middle East  
today?**

① Start presenting to display the poll results on this slide.



**Rank the 3 biggest challenges  
for Financial Advisers in the  
Middle East today?**

① Start presenting to display the poll results on this slide.



# What is the biggest opportunity for Insurance Companies in the Middle East today?

① Start presenting to display the poll results on this slide.



# What is the biggest opportunity for Wealth Managers in the Middle East today?

① Start presenting to display the poll results on this slide.





# Which area should the industry be focusing on?

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**Rank the top 3 factors for you in making a recommendation to a client?**

① Start presenting to display the poll results on this slide.

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# Opportunities, Challenges & Dilemmas Facing Middle East advisers in 2023

## ITA University

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# ITA UNIVERSITY

A POWERFUL PLATFORM FOR THE INTERNATIONAL  
FINANCIAL ADVISOR OF THE FUTURE

## ITA University

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### ITA UNIVERSITY STRATEGIC PARTNERS



Strategic alliance with IE University and CFA Institute, prestigious institutions that will allow ITA University to provide top-rated personalized training.



**CFA Institute**

Choose the best Jurisdiction for your client

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## ITA JURISDICTIONS



## Product Families



### Evolution

The new generation of savings plans



### S&P 500 Index

Unlimited growth with downside protection



### Platinum

The ultimate investment choice



### Fixed Income Portfolio

Fixed and Variable Rates



### Access Portfolio

your key to the financial markets

# ITA EXPANSION

India Office







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Thank you

### A boutique approach

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- **We have a clear strategy:**  
provide the most competitive unit-linked products for international investors
- **We serve a specific niche:**  
emerging and frontier markets
- **We have local presence:**  
affiliated offices in each of our key regions
- **We offer a state-of-the-art platform:**  
unique tools and paperless operations

“Working with a boutique firm can offer an alternative for IFAs who are looking for something different from the large firm experience.”

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