



INVESTORS TRUST

Investors Trust

a world of investment opportunities

Who we are

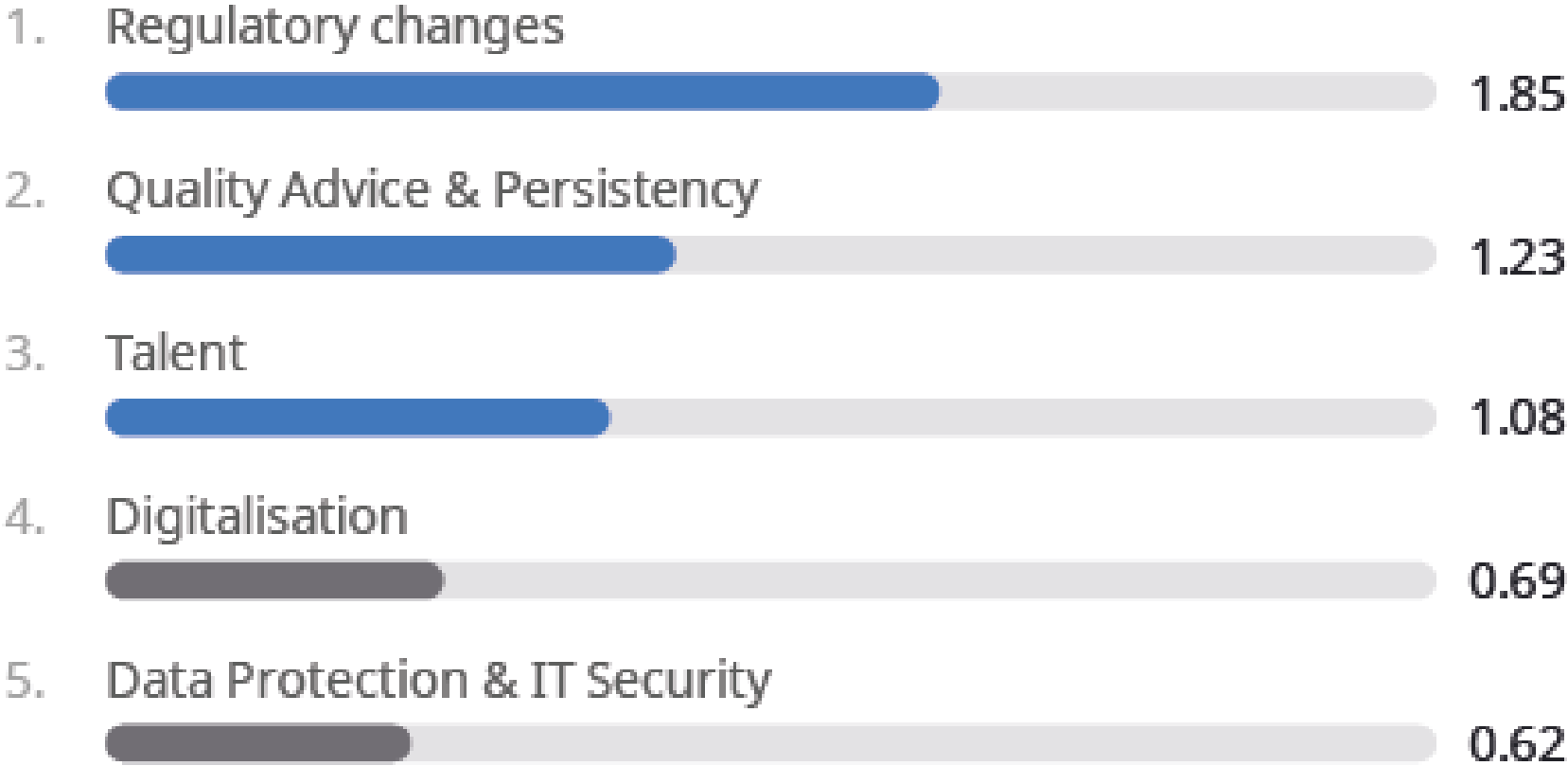
Investors Trust is the global brand representing the **ITA Group**. **ITA Group** is an **international group of insurance companies and subsidiaries** located in multiple jurisdictions around the world which aim to supply investors with access to the **global markets** through an array of **unit-linked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

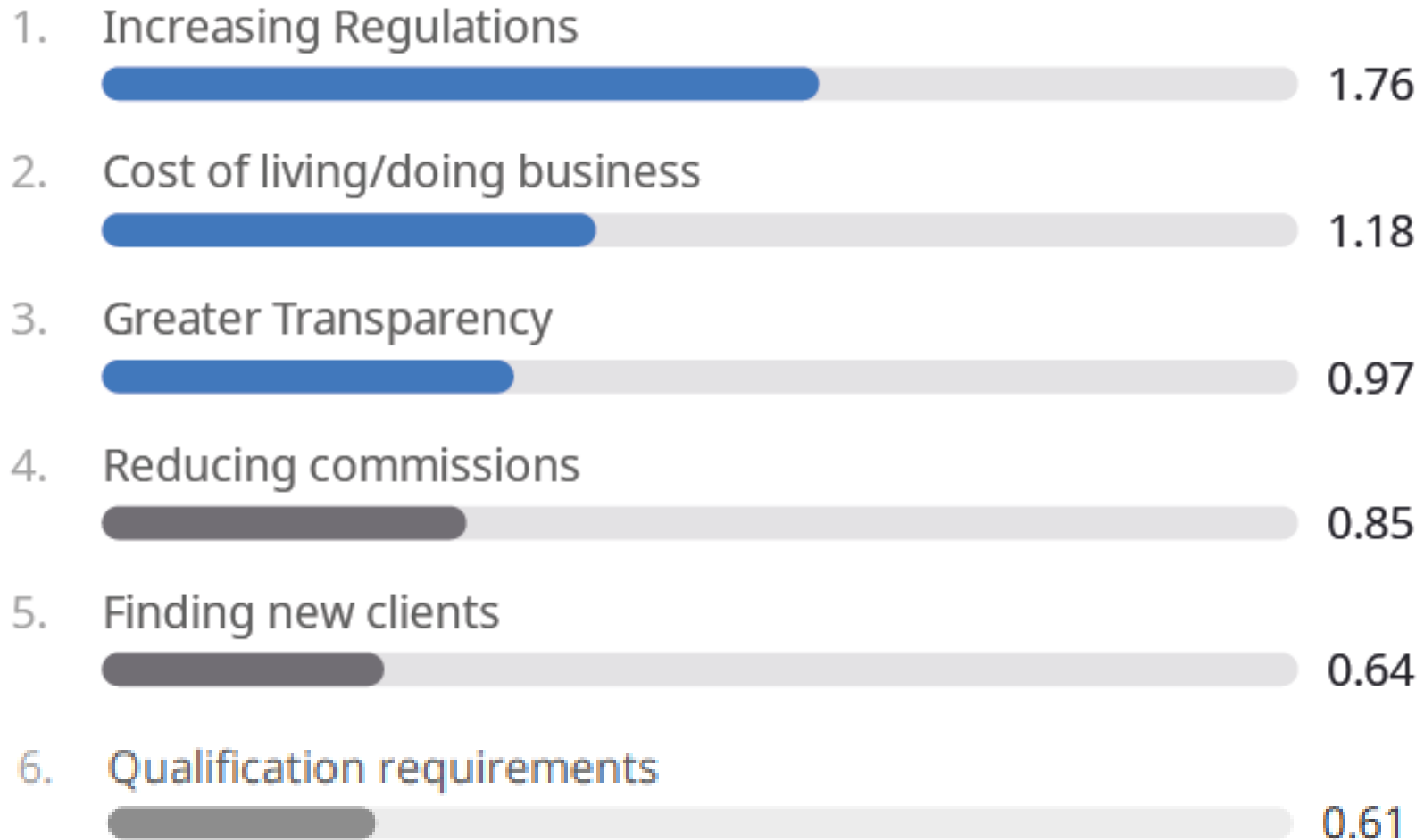
INVESTORS TRUST

Opportunities, Challenges & Dilemmas Facing Middle East advisers in 2023

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



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



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

Adapting to new regulations quickly



Growth of the regions insurance options



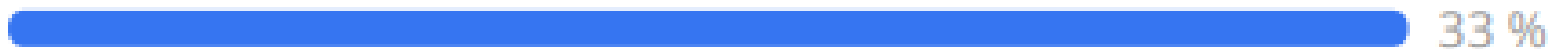
Market consolidation



Growth of Group Pensions



HNW Wealth



Family Office Wealth



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

Group Pensions

0 %

Health Insurance

0 %

Traditional Wealth Management

3 %

Mergers and Acquisitions

3 %

Growth of the region as a whole

38 %

UAE as hub for Global Wealth

57 %

Which area should the industry be focusing on?

Improving the quality of advisers



Better Transparency



Developing the next generation of advisers



Digital transformation



Preparing for AI and other technology disrupters



Qualification levels of advisers



Developing new market friendly solutions



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

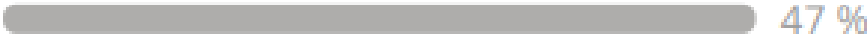
Best value



Secure company



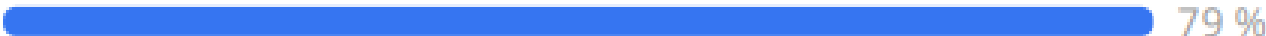
Fully online services for advisers and clients



Speed of issuance



Flexibility of the financial solution



Broker rewards and commission



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ITA University



ITA UNIVERSITY

A POWERFUL PLATFORM FOR THE INTERNATIONAL
FINANCIAL ADVISOR OF THE FUTURE

ITA University

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.



Choose the best Jurisdiction for your client

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

- **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.”