AIA Hong Kong

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Memo

Attn: All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong and Macau)

From: Leo Cheung

Dept: Life & Wealth Management Proposition Department

Copy: Mr. Alger Fung
All Department Heads
Macau CEO / ABDD Executives
Contact Centre

Total page: 2 pages + enclosure

Date: 13 January 2025

Subject: (Ref: A250102) **AIA「兩全保」保障型投資相連壽險計劃（整付保費）、AIA「兩全保」保障型投資相連壽險計劃（定期保費）及「卓達智悅 2」新增投資選擇 (J20, Z20 & Z30)**
New Investment Options for AIA 2-in-1 Protection Linked Plan (Single Premium), AIA 2-in-1 Protection Linked Plan (Regular Premium) and Treasure Master Plus 2 (J20, Z20 & Z30)

我們致力為客戶提供更加多元化的投資選擇，同時亦為財務策劃顧問創造更多的銷售機會，**友邦將推出三項全新投資選擇**。新增投資選擇適用於AIA「兩全保」保障型投資相連壽險計劃（整付保費）、AIA「兩全保」保障型投資相連壽險計劃（定期保費）及「卓達智悅2」：

代號	投資選擇名稱	風險類別
J20	施羅德環球基金系列 - 動力收息A類別（美元累積）	中
Z20	施羅德環球基金系列 - 動力收息A類別（美元收息）MF2 （分派）	中
Z30	施羅德環球基金系列 - 動力收息A類別（人民幣對沖收息）MF2（分派）	中

香港的生效日期為2025年1月25日。澳門的相關生效日期及安排將容後公佈。

為配合全新投資選擇的推出，我們將發出AIA「兩全保」保障型投資相連壽險計劃（整付保費）投資選擇小冊子(2024年6月版)之第二附件、AIA「兩全保」保障型投資相連壽險計劃（定期保費）投資選擇小冊子(2024年6月版)之第二附件及「卓達智悅2」投資選擇小冊子(2024年6月版)之第四附件，附件已隨附於本通告以供參考。

此外，2025年2月份之表現總覽將會更新以反映以上之變更。屆時請各財務策劃顧問使用已更新版本之投資選擇小冊子。AIA+、 iPoS 及 iChange 將於2025年1月25日起作出相關更新。

請將以上訊息傳達予屬下合銷售資格的財務策劃顧問，多謝合作！

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[AIA – INTERNAL]

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Memo

To further diversify the investment platforms for customers and create more business opportunities for financial planners, **AIA will launch 3 brand new investment options**.

The following new investment options shall be applicable to AIA 2-in-1 Protection Linked Plan (Single Premium), AIA 2-in-1 Protection Linked Plan (Regular Premium) and Treasure Master Plus 2:

Code	Name of Investment Options	Risk Level
J20	Schroder International Selection Fund - Dynamic Income Class A USD Acc	Medium
Z20	Schroder International Selection Fund - Dynamic Income Class A USD Dis MF2 (Dis)	Medium
Z30	Schroder International Selection Fund - Dynamic Income Class A RMB Hedged Dis MF2 (Dis)	Medium

The effective date in Hong Kong is 25 January 2025. The effective date and arrangement in Macau will be announced later.

For the launch of the new investment options, the second addendum to the Investment Options Brochure of AIA 2-in-1 Protection Linked Plan (Single Premium) (Jun 2024 version), the second addendum to the Investment Options Brochure of AIA 2-in-1 Protection Linked Plan (Regular Premium) (Jun 2024 version) and the fourth addendum to the Investment Options Brochure of Treasure Master Plus 2 (Jun 2024 version) will be issued. The addenda are enclosed for your reference.

In addition, Performance Summaries of these plans will be updated to reflect the above changes starting from the February 2025 version. Meanwhile, please use the updated version of investment options brochures. AIA+, iPoS and iChange will be updated on 25 January 2025 to reflect the respective changes.

Kindly convey the above message to all your qualified fellow financial planners.

Best Regards,

Leo Cheung
Head of Life & Wealth Management Proposition

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[AIA – INTERNAL]

The Second Addendum to AIA 2-in-1 Protection Linked Plan (Single Premium) Investment Options Brochure

AIA「兩全保」保障型投資相連壽險計劃（整付保費）投資選擇小冊子之第二附件

This addendum is to be read in conjunction with the AIA 2-in-1 Protection Linked Plan (Single Premium) Investment Options Brochure (the "IOB") with the date of publication of June 2024 and the first addendum to the IOB dated October 2024.

此附件應與印製日期為2024年6月的AIA「兩全保」保障型投資相連壽險計劃（整付保費）投資選擇小冊子（「小冊子」）及小冊子之第一附件（2024年10月）一併閱覽。

The section of the IOB titled "List of Investment Options available under AIA 2-in-1 Protection Linked Plan (Single Premium)" is updated with addition of the following investment options with immediate effect:

小冊子內的「AIA「兩全保」保障型投資相連壽險計劃（定期保費）的投資選擇」部份即時新增以下的投資選擇：

Name of Investment Option **投資選擇名稱**	**Code** **代號**	**Name of corresponding underlying fund** **對應連繫基金名稱**	**Name of management company / investment manager of underlying fund** **管理公司/連繫基金投資經理名稱**	**Share class of underlying fund** **連繫基金股票類別**	**Currency of Investment Option** **投資選擇貨幣**	**Currency of underlying fund** **連繫基金貨幣**
Multi–Assets – Global * 多元資產－環球*						
Schroder International Selection Fund - Dynamic Income Class A USD Acc 施羅德環球基金系列－動力收息A類別（美元累積）	J20	Schroder International Selection Fund - Dynamic Income 施羅德環球基金系列－動力收息	Schroder Investment Management (Europe) S.A.	Class A USD Acc A類別（美元累積）	USD 美元	USD 美元
Schroder International Selection Fund - Dynamic Income Class A USD Dis MF2 (Dis)[1] 施羅德環球基金系列－動力收息A類別（美元收息）MF2（分派）[1]	Z20	Schroder International Selection Fund - Dynamic Income 施羅德環球基金系列－動力收息	Schroder Investment Management (Europe) S.A.	Class A USD Dis MF2 A類別（美元收息）MF2	USD 美元	USD 美元
Schroder International Selection Fund - Dynamic Income Class A RMB Hedged Dis MF2 (Dis) [1] 施羅德環球基金系列－動力收息A類別（人民幣對沖收息）MF2（分派）[1]	Z30	Schroder International Selection Fund - Dynamic Income 施羅德環球基金系列－動力收息	Schroder Investment Management (Europe) S.A.	Class A RMB Hedged Dis MF2 A類別（人民幣對沖收息）MF2	RMB[#] 人民幣[#]	RMB[#] 人民幣[#]

* The asset classes in the above table are for reference only. Please refer to the offering documents of the underlying funds for details. You should not select the Investment Options for your Basic Policy solely based on these asset classes.
*上表內載明之資產類別僅供參考。有關詳情，請參閱連繫基金之銷售文件。您不應該僅基於這些資產類別選擇您基本保單內的投資選擇。

SAMPLE

The share class of the underlying fund is valuated in RMB which is currently not freely convertible and is subject to exchange controls, policies and restrictions imposed by the Mainland China authorities. Such policies may limit the depth of RMB market available outside of Mainland China, and thereby may reduce the liquidity of the underlying fund. Under exceptional circumstances, any payments (including dividend payments) made in RMB can be delayed due to the exchange controls and restrictions applicable to RMB. RMB's exchange rate against other currencies, including USD or HKD, is therefore susceptible to movements based on external factors.

連繫基金的股票類別以人民幣估值，而現時人民幣不可自由兌換，並須受中國機關施加的外匯管制、政策及限制約束。該等政策或會令中國境外的人民幣市場深度受限，因而可能削弱連繫基金的流通性。在極端情況下，連繫基金以人民幣支付的任何款項（包括股息款項）可能因適用於人民幣的外匯管制及限制而遭到延誤。因此，人民幣兌換其他貨幣（包括美元或港元）的匯率會受外圍因素的變動影響。

[1] Please refer to the sub-section "Investment Options (Cash Distribution)" of "Dividend of Underlying Funds" under the section "Investment Options Administration" on page 17 for more information on these Investment Options (Cash Distribution).

[1]有關此投資選擇（現金分派）的更多資料，請參閱第17頁「投資選擇行政程序」部分內「連繫基金的股息」的「投資選擇（現金分派）」分段。

January 2025 2025年1月

SAMPLE

The Second Addendum to AIA 2-in-1 Protection Linked Plan (Regular Premium) Investment Options Brochure

AIA「兩全保」保障型投資相連壽險計劃（定期保費）投資選擇小冊子之第二附件

This addendum is to be read in conjunction with the AIA 2-in-1 Protection Linked Plan (Regular Premium) Investment Options Brochure (the "IOB") with the date of publication of June 2024 and the first addendum to the IOB dated October 2024.

此附件應與印製日期為2024年6月的AIA「兩全保」保障型投資相連壽險計劃（定期保費）投資選擇小冊子（「小冊子」）及小冊子之第一附件（2024年10月）一併閱覽。

The section of the IOB titled "List of Investment Options available under AIA 2-in-1 Protection Linked Plan (Regular Premium)" is updated with addition of the following investment options with immediate effect:

小冊子內的「AIA「兩全保」保障型投資相連壽險計劃（定期保費）的投資選擇」部份即時新增以下的投資選擇：

Name of Investment Option **投資選擇名稱**	**Code** **代號**	**Name of corresponding underlying fund** **對應連繫基金名稱**	**Name of management company / investment manager of underlying fund** **管理公司/連繫基金投資經理名稱**	**Share class of underlying fund** **連繫基金股票類別**	**Currency of Investment Option** **投資選擇貨幣**	**Currency of underlying fund** **連繫基金貨幣**
Multi–Assets – Global * 多元資產－環球*						
Schroder International Selection Fund - Dynamic Income Class A USD Acc 施羅德環球基金系列－動力收息A類別（美元累積）	J20	Schroder International Selection Fund - Dynamic Income 施羅德環球基金系列－動力收息	Schroder Investment Management (Europe) S.A.	Class A USD Acc A類別（美元累積）	USD 美元	USD 美元
Schroder International Selection Fund - Dynamic Income Class A USD Dis MF2 (Dis)[1] 施羅德環球基金系列－動力收息A類別（美元收息）MF2（分派）[1]	Z20	Schroder International Selection Fund - Dynamic Income 施羅德環球基金系列－動力收息	Schroder Investment Management (Europe) S.A.	Class A USD Dis MF2 A類別（美元收息）MF2	USD 美元	USD 美元
Schroder International Selection Fund - Dynamic Income Class A RMB Hedged Dis MF2 (Dis) [1] 施羅德環球基金系列－動力收息A類別（人民幣對沖收息）MF2（分派）[1]	Z30	Schroder International Selection Fund - Dynamic Income 施羅德環球基金系列－動力收息	Schroder Investment Management (Europe) S.A.	Class A RMB Hedged Dis MF2 A類別（人民幣對沖收息）MF2	RMB[#] 人民幣[#]	RMB[#] 人民幣[#]

* The asset classes in the above table are for reference only. Please refer to the offering documents of the underlying funds for details. You should not select the Investment Options for your Basic Policy solely based on these asset classes.
*上表內載明之資產類別僅供參考。有關詳情，請參閱連繫基金之銷售文件。您不應該僅基於這些資產類別選擇您基本保單內的投資選擇。

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The share class of the underlying fund is valuated in RMB which is currently not freely convertible and is subject to exchange controls, policies and restrictions imposed by the Mainland China authorities. Such policies may limit the depth of RMB market available outside of Mainland China, and thereby may reduce the liquidity of the underlying fund. Under exceptional circumstances, any payments (including dividend payments) made in RMB can be delayed due to the exchange controls and restrictions applicable to RMB. RMB's exchange rate against other currencies, including USD or HKD, is therefore susceptible to movements based on external factors.

連繫基金的股票類別以人民幣估值，而現時人民幣不可自由兌換，並須受中國機關施加的外匯管制、政策及限制約束。該等政策或會令中國境外的人民幣市場深度受限，因而可能削弱連繫基金的流通性。在極端情況下，連繫基金以人民幣支付的任何款項（包括股息款項）可能因適用於人民幣的外匯管制及限制而遭到延誤。因此，人民幣兌換其他貨幣（包括美元或港元）的匯率會受外圍因素的變動影響。

[1] Please refer to the sub-section "Investment Options (Cash Distribution)" of "Dividend of Underlying Funds" under the section "Investment Options Administration" on page 17 for more information on these Investment Options (Cash Distribution).

[1]有關此投資選擇（現金分派）的更多資料，請參閱第17頁「投資選擇行政程序」部分內「連繫基金的股息」的「投資選擇（現金分派）」分段。

January 2025 2025年1月

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The Fourth Addendum to Treasure Master Plus 2 Investment Options Brochure

「卓達智悅2」投資選擇小冊子之第四附件

This addendum is to be read in conjunction with the Treasure Master Plus 2 Investment Options Brochure (the "IOB") with the date of publication of June 2024 and the first addendum to the IOB dated September 2024, the second addendum to the IOB dated October 2024 and the third addendum to the IOB dated November 2024.

此附件應與印製日期為2024年6月的「卓達智悅2」投資選擇小冊子（「小冊子」）及小冊子之第一附件（2024年9月）、小冊子之第二附件（2024年10月）及小冊子之第三附件（2024年11月）一併閱覽。

The section of the IOB titled "List of Investment Options available under the Plan" is updated with addition of the following investment options with immediate effect:

小冊子內的「計劃的投資選擇」部份即時新增以下的投資選擇：

Name of Investment Option **投資選擇名稱**	**Code** **代號**	**Name of corresponding underlying fund** **對應連繫基金名稱**	**Name of management company / investment manager of underlying fund** **管理公司/連繫基金投資經理名稱**	**Share class of underlying fund** **連繫基金股票類別**	**Currency of Investment Option** **投資選擇貨幣**	**Currency of underlying fund** **連繫基金貨幣**
Multi–Assets – Global *多元資產－環球*						
Schroder International Selection Fund - Dynamic Income Class A USD Acc 施羅德環球基金系列－動力收息A類別（美元累積）	J20	Schroder International Selection Fund - Dynamic Income 施羅德環球基金系列－動力收息	Schroder Investment Management (Europe) S.A.	Class A USD Acc A類別（美元累積）	USD 美元	USD 美元
Schroder International Selection Fund - Dynamic Income Class A USD Dis MF2 (Dis)[1] 施羅德環球基金系列－動力收息A類別（美元收息）MF2（分派）[1]	Z20	Schroder International Selection Fund - Dynamic Income 施羅德環球基金系列－動力收息	Schroder Investment Management (Europe) S.A.	Class A USD Dis MF2 A類別（美元收息）MF2	USD 美元	USD 美元
Schroder International Selection Fund - Dynamic Income Class A RMB Hedged Dis MF2 (Dis) [1] 施羅德環球基金系列－動力收息A類別（人民幣對沖收息）MF2（分派）[1]	Z30	Schroder International Selection Fund - Dynamic Income 施羅德環球基金系列－動力收息	Schroder Investment Management (Europe) S.A.	Class A RMB Hedged Dis MF2 A類別（人民幣對沖收息）MF2	RMB[#] 人民幣[#]	RMB[#] 人民幣[#]

* The asset classes in the above table are for reference only. Please refer to the offering documents of the underlying funds for details. You should not select the Investment Options for your Basic Policy solely based on these asset classes.
*上表內載明之資產類別僅供參考。有關詳情，請參閱連繫基金之銷售文件。您不應該僅基於這些資產類別選擇您基本保單內的投資選擇。

The share class of the underlying fund is valuated in RMB which is currently not freely convertible and is subject to exchange

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controls, policies and restrictions imposed by the Mainland China authorities. Such policies may limit the depth of RMB market available outside of Mainland China, and thereby may reduce the liquidity of the underlying fund. Under exceptional circumstances, any payments (including dividend payments) made in RMB can be delayed due to the exchange controls and restrictions applicable to RMB. RMB's exchange rate against other currencies, including USD or HKD, is therefore susceptible to movements based on external factors.

連繫基金的股票類別以人民幣估值，而現時人民幣不可自由兌換，並須受中國機關施加的外匯管制、政策及限制約束。該等政策或會令中國境外的人民幣市場深度受限，因而可能削弱連繫基金的流通性。在極端情況下，連繫基金以人民幣支付的任何款項（包括股息款項）可能因適用於人民幣的外匯管制及限制而遭到延誤。因此，人民幣兌換其他貨幣（包括美元或港元）的匯率會受外圍因素的變動影響。

[1] Please refer to the sub-section "Investment Options (Cash Distribution)" of "Dividend of Underlying Funds" under the section "Investment Options Administration" on page 17 for more information on these Investment Options (Cash Distribution).

[1]有關此投資選擇（現金分派）的更多資料，請參閱第17頁「投資選擇行政程序」部分內「連繫基金的股息」的「投資選擇（現金分派）」分段。

January 2025

2025年1月

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