

**MAKING
MONEY
WORK
FOR
YOU.**

Barita





WHO WE ARE

We are the future of money.

We are financial gamechangers. We're here to revolutionize wealth accessibility with smarter tech, teams and interactions.

We talk about Barita MoneyIQ because it's at the core of why we do what we do, and HOW we win. MoneyIQ means staying ahead of the curve, growing wealth with confidence, consistency and creativity.

We believe in empowering our customers with knowledge, enhanced earnings and custom-crafted plans for their best financial outcomes.

When we say we are 'Making money work for you', we mean it.

Always have. Always will.
Come see us change your future. Today.



WHAT WE DO

Barita: Built to Win

Barita knows money. We've proven it for over 45 years. Our MoneyIQ is about applying the best of tech, intel and industry insight to develop real solutions and build real wealth.

We excel in:

- Equities Trading
- Asset & Funds Management
- Cambio Trading
- Unit Trusts
- Investment Banking
- Private Wealth
- Structured Products
- Pension
- Investment Research



MANAGED FUNDS

Dive into pooled funds

Independent investments or pooled: Barita knows there's more than one way to wealth. We've mastered them all.

Whatever level investor you are, or whatever level you're aiming for, get industry insight and investment access to grow your wealth.

The Barita Money IQ Managed Funds Edge

Strong Investments

Your investments are amplified when they're combined with other investments into a single, larger pool of funds. This new, major investment allows you to invest in opportunities you might not have been able to access otherwise. That's the power of a Barita Managed Fund.

Strong Management

Barita MoneyIQ applies our in-depth market research and analysis to make the best decisions for your funds. We don't just manage your money, we grow your wealth. That's a win win that's hard to beat.

Strong Profits

Managed funds are gathered into a single, combined investment, so your Barita analysts can give them even closer attention to maximize profits.

Strong Opportunities

As an individual investor, you have great power. As part of an investment pool, your power multiplies, and you can instantly access large-scale investment opportunities not available to the single investor.

Strong Performance

Barita has led the market for over 45 years. When we say we make your money work for you, we mean it.

WHAT ARE MANAGED FUNDS?

Amplify your investments and unleash greater opportunities. Let Barita help. Our Managed Funds add your investments to a pool of funds from other investors to manage the combined contributions as a single fund. Also known as Unit Trust Funds or Mutual Funds, the combined investment offers greater opportunities.

Barita MoneyIQ is how we navigate the market and win.

Dive into pooled funds



Capital Growth Fund

Barita's Capital Growth Fund is where money happens. We combine high yield stocks and low-risk fixed income investments for optimum outcomes on minimum hassle.



Money Market Fund

Wealth doesn't need a deadline. Barita's Money Market Fund builds wealth no haste, no hassle.



FX Growth Portfolio

Don't just make money. Build real wealth. It's our high-risk, high-reward USD equity portfolio, applying Barita MoneyIQ to strategically navigate the FX market. We analyze the market, stay ahead of the trends and time our trades to curate the FX instruments that return the strongest profit.



FX Bond Portfolio

Barita harnesses the might of the FX market by analyzing trends, sharpening strategies and expertly timing our moves. Invest in our foreign currency instruments and watch your USD outperform the market.



Real Estate Portfolio

The Barita Real Estate Unit Trust unlocks stronger deals by pooling resources and using this collective investment to land bigger ownership and development opportunities.



Income Portfolio

Pay yourself a little extra every month. The Barita Unit Trust Income Portfolio pays out interest on your investment at regular intervals, while growing the principal.



FX Accumulator

The FX Accumulator enables smart investors to maximize USD returns in JMD markets. Managed by Barita's best, the Fund navigates USD instruments for high performance with relatively low risk.

BARITA WEALTH

Time is priceless. Make it count.

Welcome to Barita Wealth. Designed for select private and corporate clients, our Wealth Management suite of services offers high-level customisation built around one ideal: **elevating your entire experience.**

One on One service.

Unlimited potential.

Relationships take time. So that's what we promise you: time to learn more about you, your goals, your business and your wealth journey.

Creating opportunities is what you're all about. Maximizing them is where we come in. Together, you and your Barita Wealth Management team will plan your best path to success, access premium resources, optimise your personal or corporate wealth strategies and more.

Onwards and upwards. That's where we take your professional interests and your profits. It's a new day for success.

GET STARTED WITH BARITA WEALTH

Corporate Clients

Belong with Barita

Barita Wealth is about boosting your outcomes as an individual or corporate client. We lead our industry. Let's help you dominate yours too, by managing liquidity, asset management and portfolio returns. It's your time. Make the most of it with Barita Wealth.

With Barita Wealth, there's no limit. Your dedicated Barita Wealth team is ready to build with you, through:

- **Financial planning**
- **Investment advice and management**
- **Retirement planning**
- **Risk management**

Superior Access. Barita Wealth.

Barita Wealth is at your service. Let our Barita Wealth team of experts revolutionise your way forward.

Get Started! Follow these Easy Steps to open an account.

1



Valid Photo ID – Driver's licence, Passport, National ID

2



TRN (JA residents) / **Social Security** (US residents) / **National Insurance** (UK/Canadian residents)

3



Two (2) references for each account holder (adult) – Employer, JP, Minister of Religion, Doctor, Lawyer, Inspector of Police, current Barita client

4



Proof of address – Recent light, water or telephone bill

5



Completed & signed client agreement form – (online or in office):
barita.com/forms

6



Source of funds – Three recent payslips or job letter
Proof of income (if not supported by source of funds)

7



Birth Certificate & TRN – for minor(s).
Valid picture identification or notarized picture

BARITA G.P.S.

Goal-setting starts with goal investing. Your goal and investment risk profile will determine the Barita G.P.S. portfolio mix. Start investing with a short quiz and an investment call.

Onboarding Website Address

<https://online.barita.com/onboarding/personal>

IT'S ABOUT THE FREEDOM TO CHOOSE

One size doesn't fit all. We have a range of products that fit your investment style.



Managed Funds

Independent investments or pooled: Barita knows there's more than one way to wealth. Whether you're experienced or starting out, let Barita build your blue print to wealth.



Stocks & Research

Stock Market Smarts. Stock Market Wins. Barita MoneyIQ is our unique system of tech, insight and Intel.

It means our team has what it takes to support your stock market moves at any level.



Fixed Income

Barita's Fixed Investments: Our strategically selected bonds help investors outsmart inflation and build a steady income stream that can pay out at regular intervals.



FX Trading / Cambio

Global Reach. Global Wealth
Trading your money across currencies can boost your outcomes. Barita's FX Traders apply MoneyIQ to find you the best rates in the business for moving your money across global markets.



Individual Retirement Scheme Plan

A great way to start building your retirement dream. Governed by a Trust Deed, which makes investments completely secure.



Pension Fund Management

As a licensed securities and primary dealer, you are assured of our proven investing values and our experienced team of Fund Managers.



Portfolio Management Services

Our Portfolio Management Services product enables high-net-worth individuals and medium-to-large corporations to adjust to market changes by offering customized portfolio management solutions for clients.



Barita MoneyIQ: MONEY-MAKING RULES THAT WORK

It may not have always had this name, but MoneyIQ has always been at the centre of Barita's impeccable wealth-building track record.

So, what is Barita MoneyIQ? It's the secret to our winning edge. It's how we use what we know to change the world.

- It drives superior returns for our products & services, with our top managed fund that has consistently outperformed the competition within the Investment Management Space.
- Defines our business edge, giving us top recognition from the Jamaica Stock Exchange in investor relations and an above 84% customer satisfaction rating.
- Empowers our clients who are over 29,071 strong.
- Keeps us on top, with over \$336 Billion in assets under management.

With our team of analysts and advisors, board members and brokers, Barita is the ultimate Financial BrainTrust. We believe in data. We believe in technology. We believe in staying ahead of the curve, with cutting-edge industry insight, intel and innovation.

We might not know the future, but that's not stopping us from shaping it and designing the very best outcomes for our clients.

Our collective genius is our superpower.

That's Barita MoneyIQ.

BARITA SMART LOAN

Borrow today without derailing tomorrow

Building wealth is important. So is being able to access funds when you need them. Why choose?

Barita's Smart Loan brings the best of both worlds. Borrow cash against your investments. Your investment keeps growing, while you get the cash you need at competitive repayment terms.

Good for now. Good for later.

Get the cash you need without compromising your investments. That's just one way the Barita Smart Loan wins. Plus:

We're Competitive

Our interest rate is as low as 8.25%. Plus you can borrow up to 90% of your Barita Fixed Income investments and 65% of some Equity investments.

We're On Your Side

We work hard to design practical, everyday wins while still building and protecting your wealth.

We're Fast

We process loans within 24 hours

We're Accommodating

We give you up to 5 years to repay loans.

Life happens. Barita's Smart Loan helps.

Wealth is a long-term goal. For every other situation, there's a Barita Loan to help.

Conditions Apply.

CONTACT US

Toll Free: 888-429-5333

www.barita.com

**Our team is committed to
growing your wealth.**

We've made sure of that.



**MAKING MONEY
WORK FOR YOU.**

LOCATIONS

New Kingston

15 St. Lucia Way
Kingston 5
kingston@barita.com

Montego Bay - Fairview

Shop 5,
Fairview Town Centre
fairview@barita.com

Mandeville

Shop 2A,
Manchester Shopping Centre
18 Caledonia Road
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Barita Foundation

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What kind of investor are you?

[FIND OUT NOW](#)

New Kingston Retail

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BaritaInvestments



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BaritaLimited



barita-investments-ltd



BaritaInvestmentsLtd