

Why a diversified investment strategy is important

Use the colour coding to see how the performance of various asset classes can vary from year to year.

MISKIMMINWEALTH_{Ltd.}

Market Indices <i>(used for the performance data of each asset class)</i>	Asset Classes	Asset class performance is listed from best to worst for each year												
		2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
FTSE All Share	UK Equities	47.75%	44.69%	101.73%	32.82%	19.94%	37.11%	35.72%	23.69%	18.16%	49.55%	25.40%	5.06%	30.33%
FTSE Small Cap.	UK Small Cap	37.08%	42.75%	58.93%	30.37%	17.71%	27.82%	32.77%	20.02%	11.56%	44.06%	18.15%	4.64%	25.65%
S&P 500	US Equities	28.88%	36.85%	54.27%	22.61%	15.57%	17.82%	29.10%	18.96%	9.17%	34.30%	17.53%	3.82%	23.68%
Russell 2000	US Small Cap	16.60%	27.49%	30.12%	21.18%	14.35%	15.78%	25.19%	13.86%	8.60%	33.28%	15.60%	2.86%	20.45%
FTSE World Europe ex UK	European Equities	15.72%	12.81%	21.16%	19.52%	12.28%	13.03%	25.03%	12.58%	6.58%	32.67%	13.10%	0.96%	20.17%
Topix	Japanese Equities	14.75%	6.26%	20.23%	19.07%	6.77%	12.60%	20.81%	11.25%	5.43%	32.63%	10.62%	0.72%	19.17%
MSCI EM	EM Equities	8.45%	5.53%	20.09%	17.98%	5.88%	12.30%	13.62%	11.00%	5.35%	31.58%	7.86%	0.57%	18.82%
FTSE Actuaries UK Conventional Gilts All Stocks	Gilts	7.65%	3.72%	15.35%	17.97%	3.86%	10.78%	11.84%	10.07%	2.88%	24.33%	7.31%	-0.14%	15.76%
FTSE Actuaries UK Index-Linked All Stocks	Index-Linked Gilts	6.02%	1.32%	14.77%	16.47%	3.43%	10.76%	8.19%	7.59%	1.94%	23.41%	5.70%	-0.28%	15.15%
ICE BoA ML Sterling Corporate	Corporate Bonds	5.32%	-8.75%	14.46%	14.95%	2.23%	10.16%	5.23%	6.75%	0.98%	22.27%	5.25%	-0.92%	13.86%
ICE BoA ML Sterling High Yield	High Yield Bonds	5.27%	-9.10%	12.70%	14.51%	0.87%	9.93%	4.74%	5.89%	0.72%	21.86%	5.16%	-1.65%	13.37%
ICE BoA ML Global Broad Market	Global Bonds	3.14%	-13.13%	11.78%	8.93%	-1.18%	2.92%	2.59%	5.65%	0.57%	19.69%	4.86%	-2.25%	11.42%
JPM GBI-EM Global Composite	EM Bonds	2.47%	-13.39%	7.74%	8.90%	-2.20%	2.82%	1.76%	5.61%	0.57%	16.75%	4.36%	-2.30%	9.43%
IA Sterling Strategic Bond Sector Average	Strategic Bond Funds	1.37%	-13.43%	6.45%	8.88%	-3.04%	2.70%	0.54%	3.90%	0.53%	14.29%	4.32%	-2.40%	8.98%
HFRX Global Hedge Fund	Global Hedge Funds	0.56%	-18.97%	2.50%	8.76%	-3.46%	0.88%	0.51%	2.39%	-0.29%	13.22%	2.34%	-5.85%	6.90%
HFRX Equity Market Neutral	Equity Market Neutral Funds	0.23%	-23.99%	1.21%	8.50%	-3.84%	0.85%	-0.17%	1.25%	-0.97%	11.90%	1.94%	-8.58%	6.42%
MSCI UK Monthly Property	UK Property	-0.87%	-25.00%	0.96%	8,28%	-8.19%	0.83%	-3.94%	1.18%	-6.95%	10.45%	1.83%	-9.27%	4.43%
Dow Jones Brookfield Global Infrastructure (Bloomberg)	Infrastructure	-3.57%	-29.93%	-1.16%	7.20%	-11.85%	0.63%	-4.41%	0.89%	-9.48%	10.10%	0.36%	-9.45%	2.73%
Brent Crude	Oil	-6.73%	-32.44%	-4.63%	5.86%	-12.53%	-0.32%	-4.46%	0.54%	-9.99%	7.28%	-2.30%	-9.47%	0.81%
LBMA Gold Bullion Troy Ounce	Gold	-6.78%	-35.39%	-5.47%	5.75%	-14.71%	-1.03%	-10.22%	0.16%	-12.18%	1.30%	-3.18%	-9.52%	0.01%
LIBOR GBP 3 Months	Cash	-10.55%	-43.91%	-15.92%	0.70%	-17.82%	-8.84%	-29.37%	-44.36%	-42.42%	0.50%	-7.07%	-9.60%	-5.66%
	Difference between best & worst	58.30%	88.60%	117.65%	32.12%	37.76%	45.95%	65.09%	68.05%	60.58%	49.05%	32.47%	14.66%	35.99%
	Average annual return	8.23%	-4.10%	17.49%	14.25%	1.15%	8.55%	7.86%	5.66%	-0.44%	21.69%	6.63%	-2.53%	12.47%

You should not use past performance as a suggestion of future performance. It should not be the main or sole reason for making an investment decision. The value of investments and any income from them can fall as well as rise and you may not get back the original amount invested.

Source: Financial Express Analytics as at 31 December 2019. Total returns in GBP.

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