

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

Index	Asset Class	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
FTSE All Share	UK Equities	19.6	17.2	39.6	25.4	5.1	25.6	17.6	27.1	1.4	18.8
		US Equities	Japanese Equities	US Smaller Cos.	EM Equities	Global Bonds	US Equities	Asia Equities	US Equities	Cash	US Equities
Numis Smaller Companies (Ex-ICs)	UK Smaller Companies	14.7	11.1	32.8	20.3	0.6	25.2	16.6	21.9	0.3	15.7
		Gilts	UK Smaller Cos.	UK Equities	Asia Equities	US Equities	UK Smaller Cos.	US Equities	UK Smaller Cos.	UK Equities	EU Equities
Russell 1000	US Equities	13.3	6.1	32.6	19.5	0.6	22.3	15.8	18.9	-5.2	12.8
		US Smaller Cos.	US Equities	EM Equities	UK Smaller Cos.	Cash	US Smaller Cos.	US Smaller Cos.	US Smaller Cos.	Japanese Equities	Japanese Equities
Russell 2500	US Smaller Companies	12.6	5.4	31.7	17.5	0.5	20.5	14.7	18.3	-5.3	10.3
		Corp Bonds	EU Equities	Asia Equities	EU Equities	Gilts	EU Equities	EM Equities	UK Equities	Asia Equities	US Smaller Cos.
FTSE World Europe ex UK	European Equities	7.6	2.9	22.3	14.1	-0.1	19.2	10.7	17.4	-6.4	10.1
		Global Bonds	Global Bonds	Japanese Equities	Japanese Equities	Short-Dated Bonds	UK Equities	Japanese Equities	EU Equities	Global Bonds	UK Smaller Cos.
FTSE World Asia Pacific ex Japan	Asian (ex-Japan) Equities	7.3	2.3	21.9	13.1	-2.3	15.2	9.3	9.3	-7.0	9.9
		Balanced Portfolio	US Smaller Cos.	Global Bonds	UK Equities	Corp Bonds	Balanced Portfolio	Corp Bonds	Balanced Portfolio	EU Equities	Corp Bonds
FTSE Japan	Japanese Equities	5.0	1.7	19.8	10.7	-4.6	14.9	8.8	8.2	-7.3	8.7
		Asia Equities	Balanced Portfolio	Balanced Portfolio	Balanced Portfolio	Balanced Portfolio	Asia Equities	Gilts	Asia Equities	Short-Dated Bonds	Balanced Portfolio
MSCI Emerging Markets	Emerging Market Equities	4.1	1.4	19.7	10.5	-4.8	14.4	8.6	2.1	-8.5	8.3
		Short-Dated Bonds	Short-Dated Bonds	EU Equities	US Equities	US Smaller Cos.	Japanese Equities	EU Equities	Japanese Equities	Balanced Portfolio	Asia Equities
ICE BofA UK Gilt	Gilts	3.9	1.0	16.8	6.2	-6.8	13.9	5.6	0.1	-8.5	7.9
		EM Equities	UK Equities	UK Equities	US Smaller Cos.	Asia Equities	EM Equities	Global Bonds	Cash	US Smaller Cos.	UK Equities
ICE BofA Sterling Corporate	Corporate Bonds	2.4	0.5	11.9	5.2	-7.9	11.4	4.7	-1.0	-9.4	6.9
		Japanese Equities	Corp Bonds	Corp Bonds	Corp Bonds	Japanese Equities	Corp Bonds	Balanced Portfolio	Short-Dated Bonds	US Equities	Short-Dated Bonds
ICE BofA 15 Year Sterling Non Gilt	Short-Dated Bonds	1.2	0.5	10.6	1.9	-9.3	7.3	3.1	-1.6	-10.0	4.6
		UK Equities	Gilts	UK Smaller Cos.	Gilts	EM Equities	Gilts	Short-Dated Bonds	EM Equities	EM Equities	Cash
ICE BofA Global Broad Market	Global Bonds	0.4	0.5	10.6	1.8	-9.5	3.9	0.2	-3.3	-17.9	3.7
		Cash	Cash	Gilts	Short-Dated Bonds	EU Equities	Short-Dated Bonds	Cash	Corp Bonds	UK Smaller Cos.	Gilts
BoE Sterling Overnight Index Average 'SONIA'	Cash	0.2	-4.4	4.2	0.3	-9.5	2.7	-4.3	-4.4	-19.9	3.6
		EU Equities	Asia Equities	Short-Dated Bonds	Cash	UK Equities	Global Bonds	UK Smaller Cos.	Global Bonds	Corp Bonds	EM Equities
Blend of Indices*	Balanced Portfolio	-1.9	-10.0	0.4	-2.3	-15.4	0.7	-9.8	-5.3	-25.1	-0.4
		UK Smaller Cos.	EM Equities	Cash	Global Bonds	UK Smaller Cos.	Cash	UK Equities	Gilts	Gilts	Global Bonds

*Balanced Portfolio uses Graphene C2 index equivalent, which is as follows: 28.5% FTSE All Share, 1.5% Numis Smaller Companies ex Investment Companies, 13.5% Russell 1000, 1.5% Russell 2500, 5% FTSE World Europe ex UK, 7% FTSE Japan, 3% FTSE World Asia Pacific ex Japan, 10% MSCI Emerging Markets, 14% ICE BoA UK Gilts All Stocks, 5% ICE BoA Global Broad Market, 6% ICE BoA Sterling Corporate, 1.25% ICE BofA 1-5 Year Sterling Non-Gilt, 3.75% SONIA GBP. Portfolio is rebalanced every 6 months in February and August.

Source: FE fundinfo. All returns as at calendar year end in GBP.

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.

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