Omnis Live

7 October 2026

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CPD

As a result of participating in this webinar, you will understand:

- The macro-economic environment and its impact on asset classes
- The principles of investment planning: Asset Allocation
- The principles of investment planning: Portfolio Construction
- The performance of investments

Please remember that for this session to qualify as structured CPD you must include a note on the CPD file that captures your specific learning need along with a reflective statement that captures how the session has addressed it.

Today's CPD Code
OPW541

Previous Omnis Live Codes
September: OPW540
August: OPW539

Previous Omnis MTM Codes
September: OPW529
July: OPW528

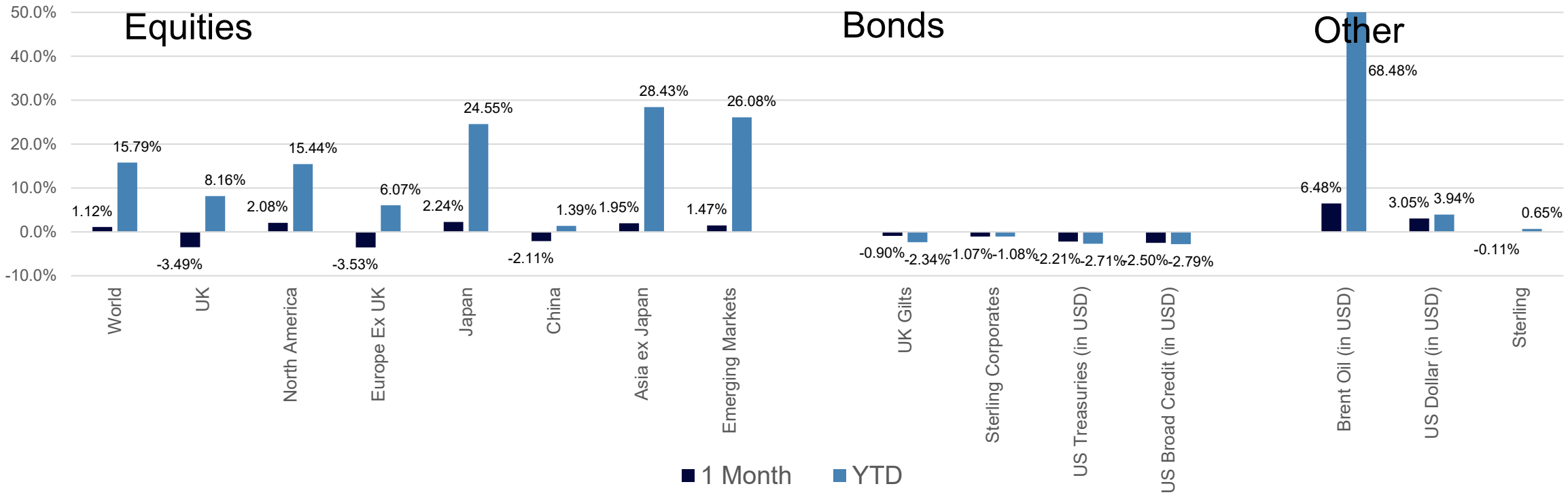
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Agenda

1. Macro & Market Update
2. Performance Update
3. Upcoming Events
4. Q&A

Key Markets Performance

Divergent Equity performance, negative Bonds, US Dollar on the move



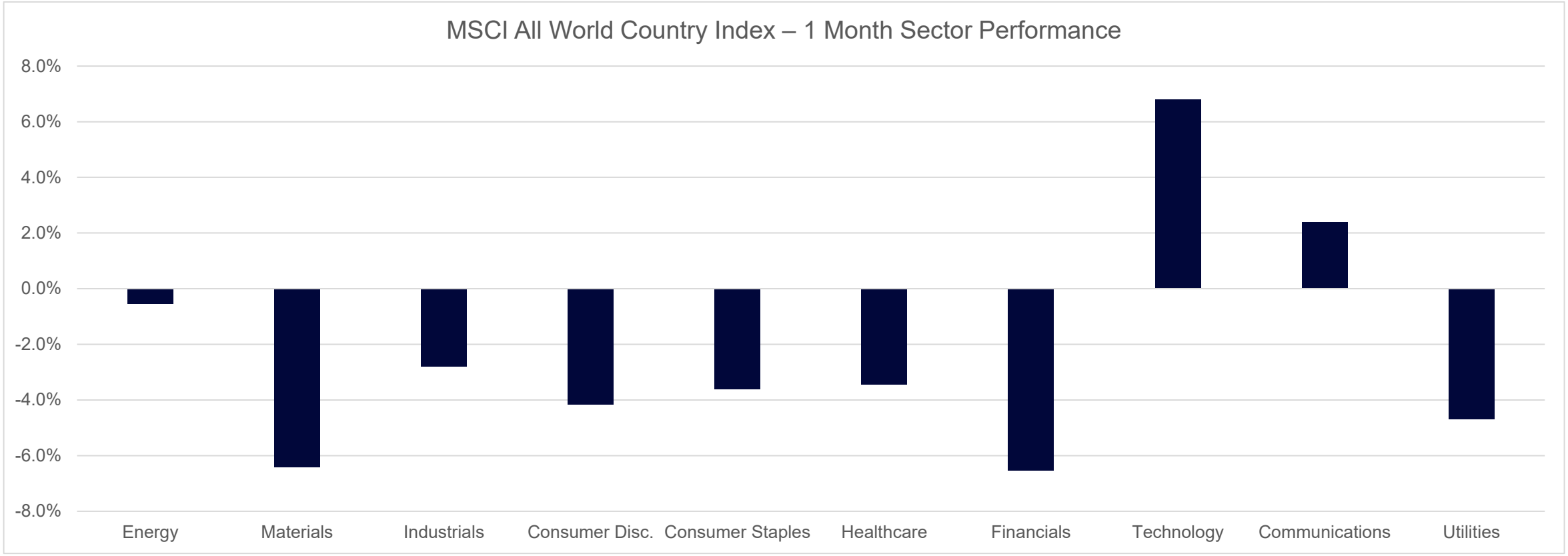
Performance in GBP to 02/10/2026

Source : Bloomberg, MSCI

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Equity Market Sector Performance

Interest-rate sensitive sectors underperformed



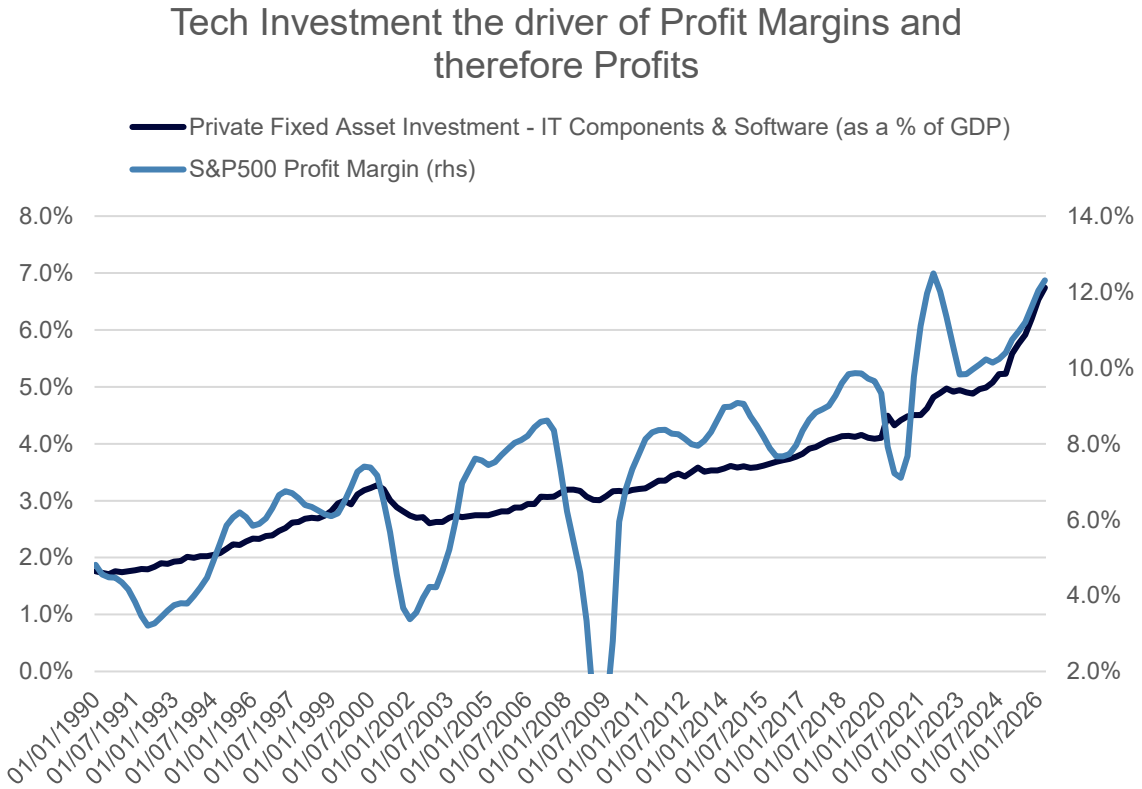
Performance in USD to 02/10/2026

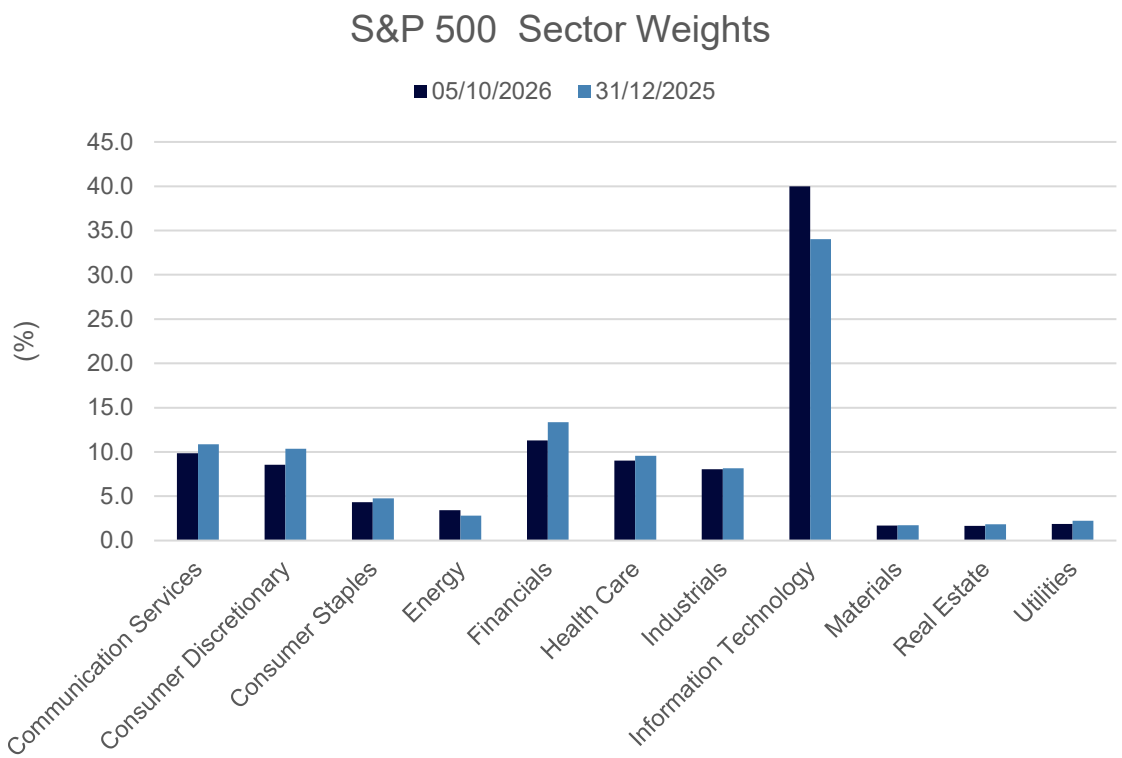
Source : Bloomberg, MSCI

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Tech leads as concentration increases further

Investment creates demand, supply has not caught up - prices and margins higher



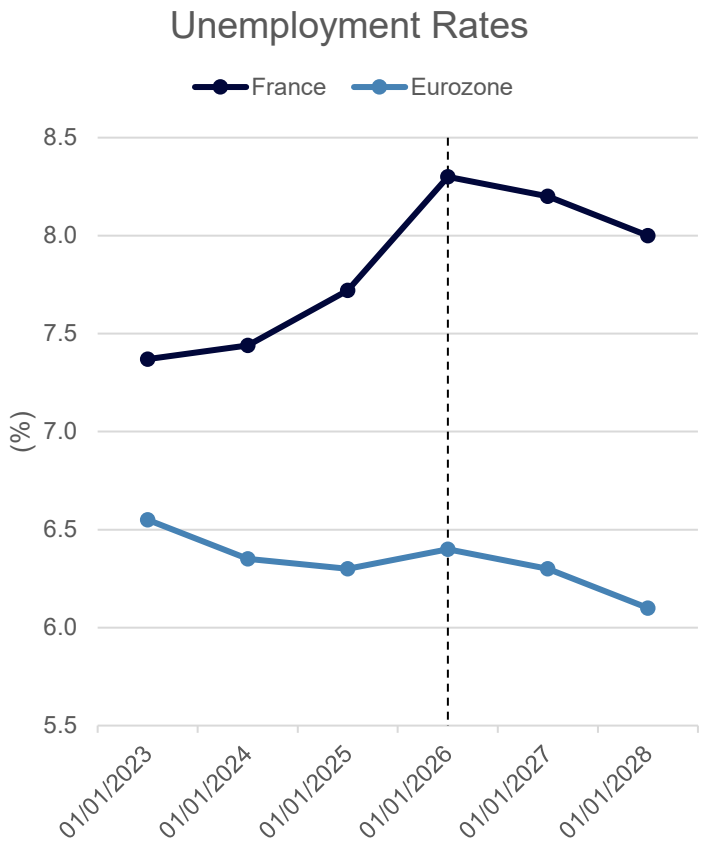


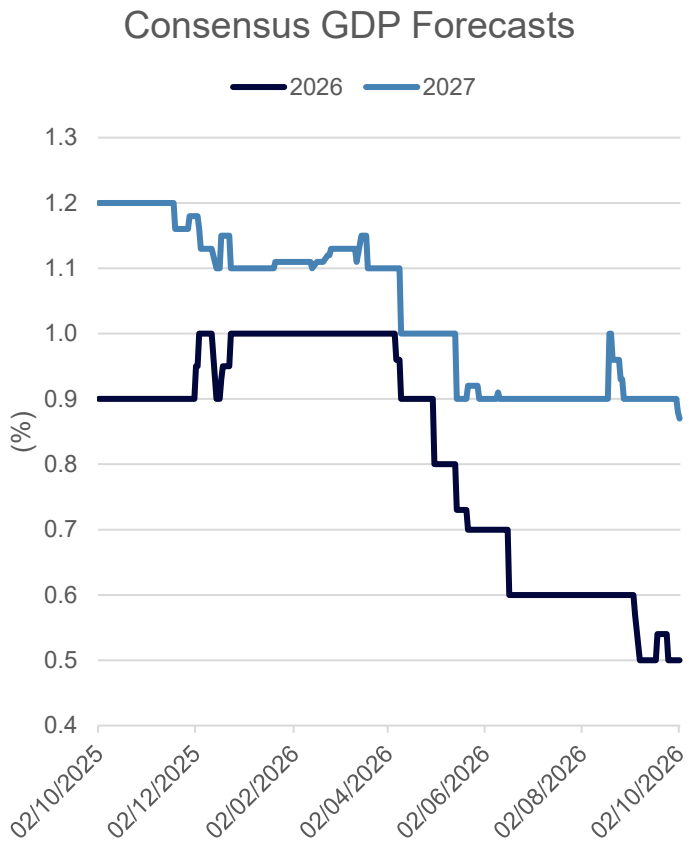
Source : Bloomberg

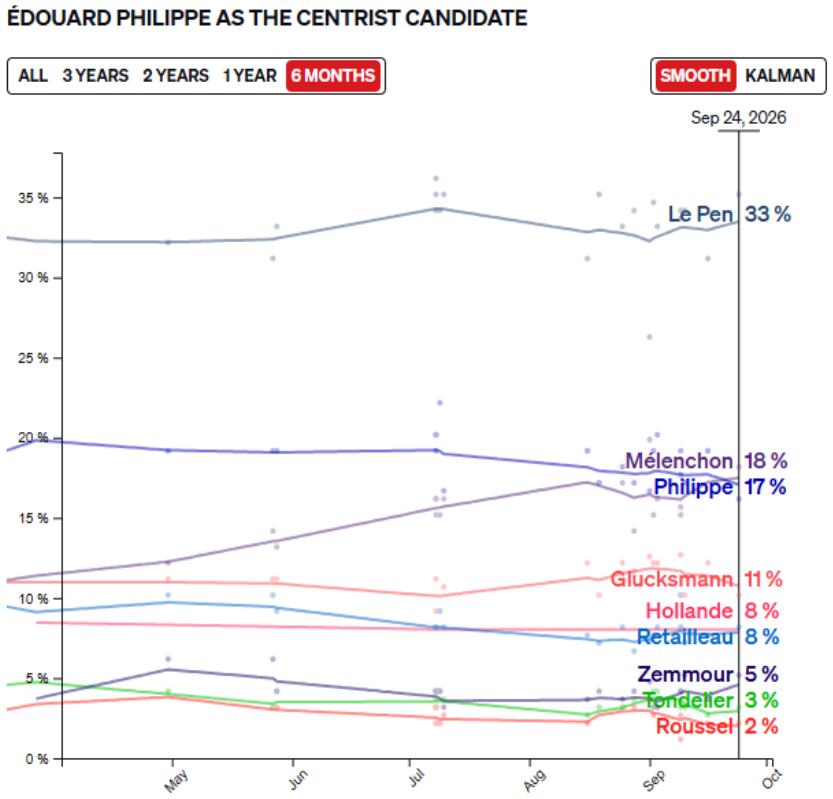
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Bond markets remain the dominant theme

Fiscal deterioration, political uncertainty and social unrest has seen France underperform





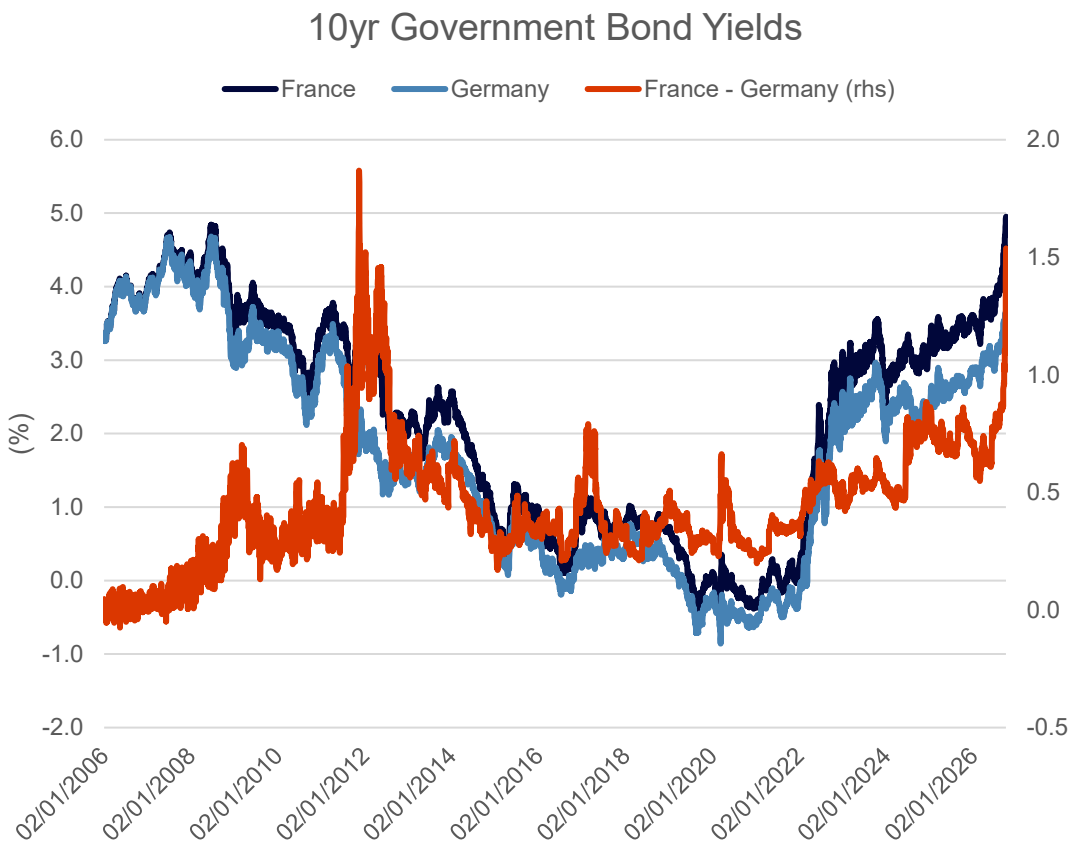


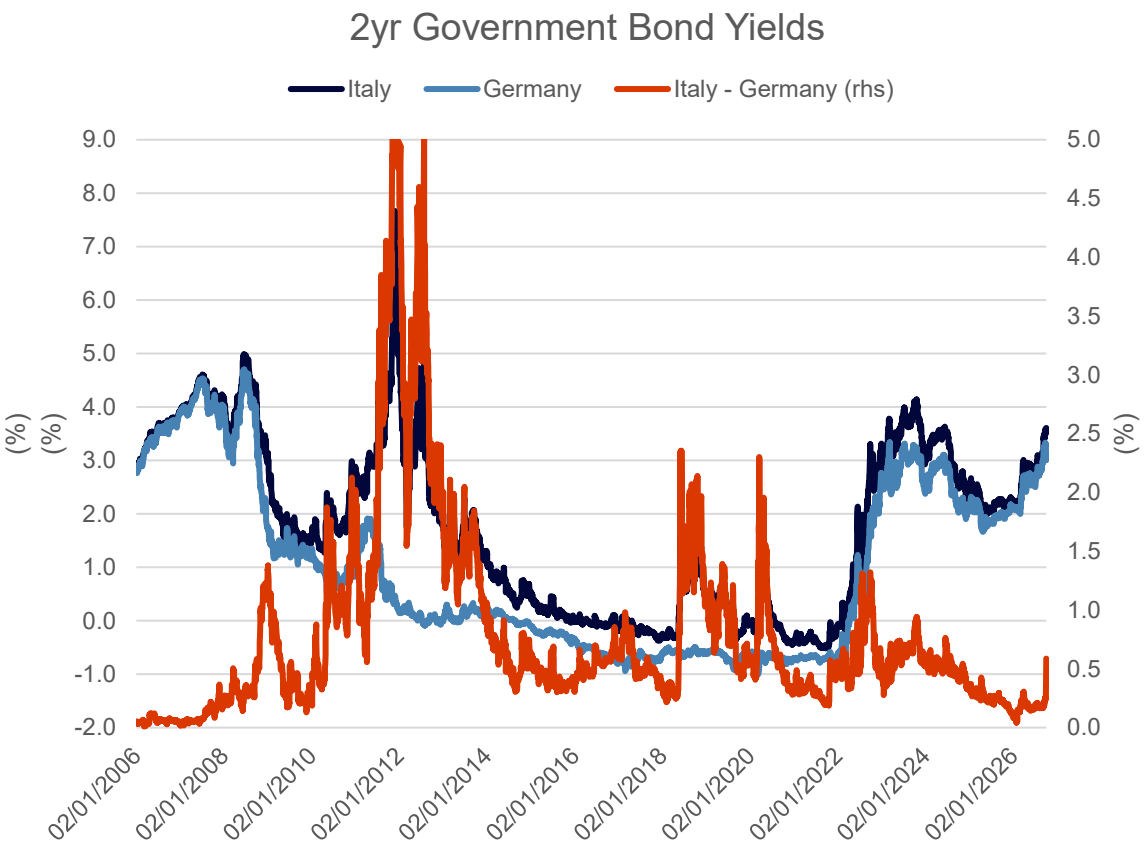
Source : Bloomberg, Politico

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France yield premium on a par with 2011

And beginning to impact other sovereign markets…and assets





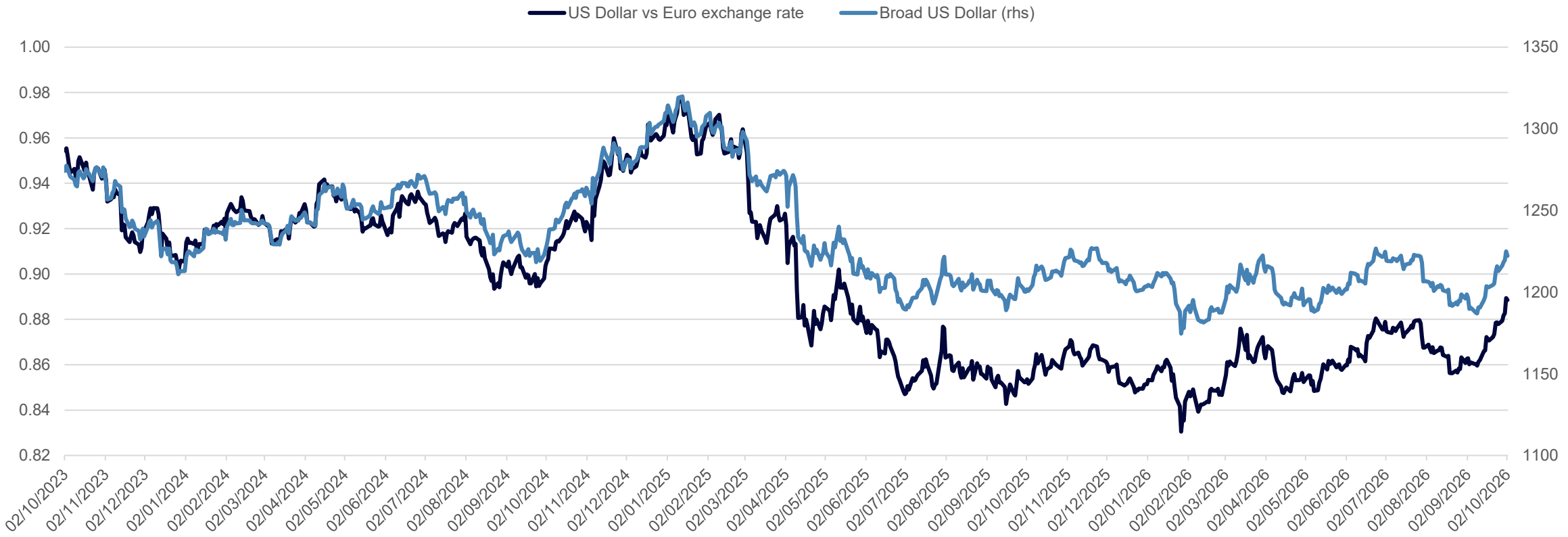
Performance in local currency to 02/10/2026

Source : Bloomberg

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Fear has seen Eurozone assets underperform

With all that is going on domestically, the US Dollar appears to be still serving as a safe asset



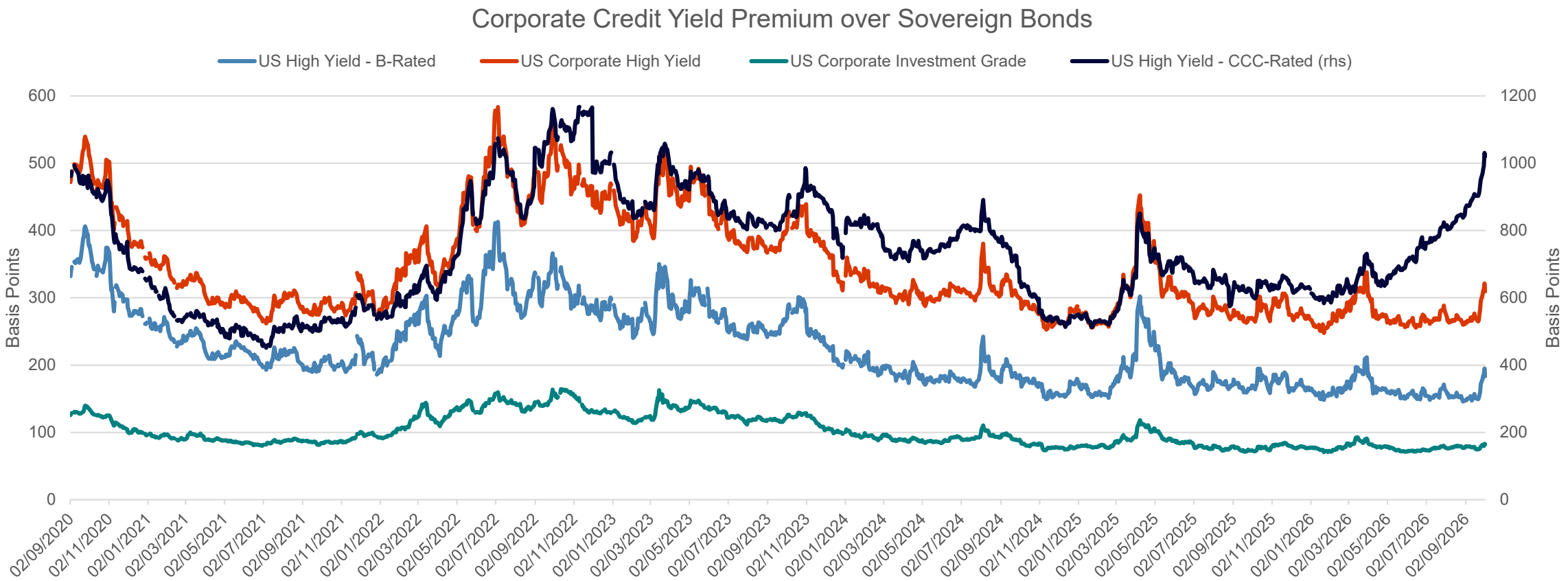
Performance in GBP to 02/10/2026

Source : Bloomberg

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There are some signs of stress beyond Europe

Spillovers in credit markets – but limited to lower rated sectors for now



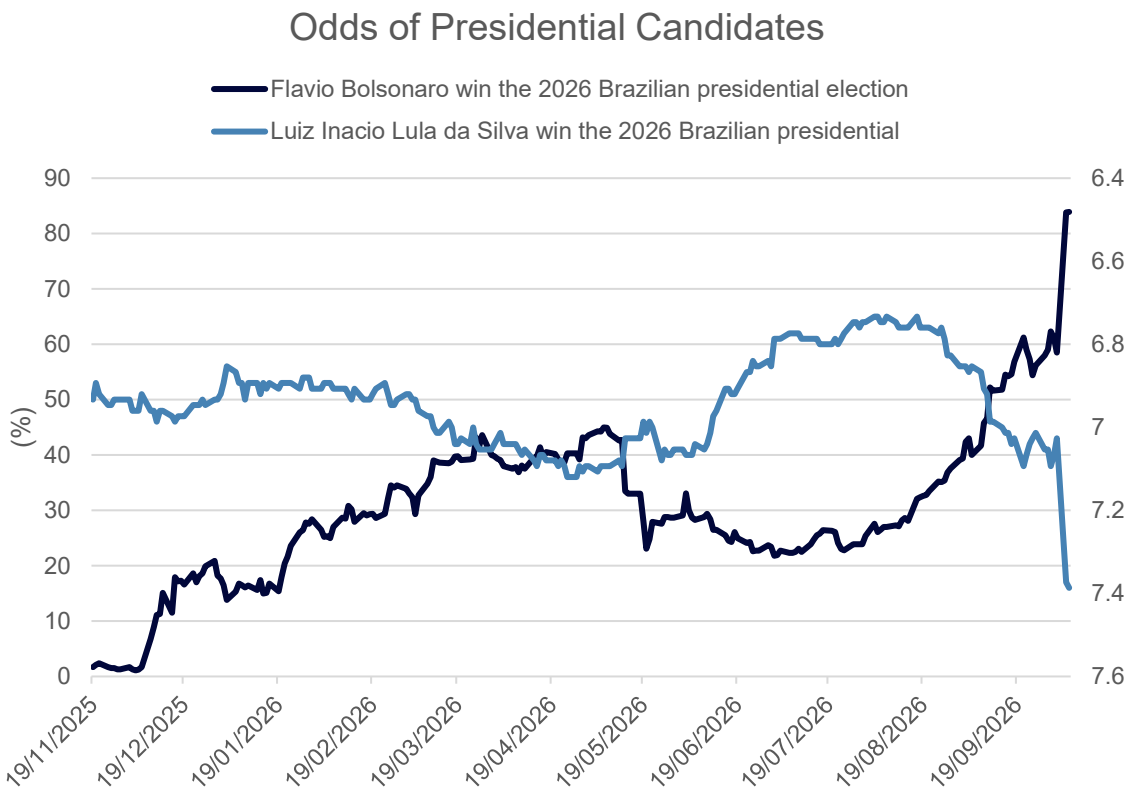
Performance in GBP to 02/10/2026

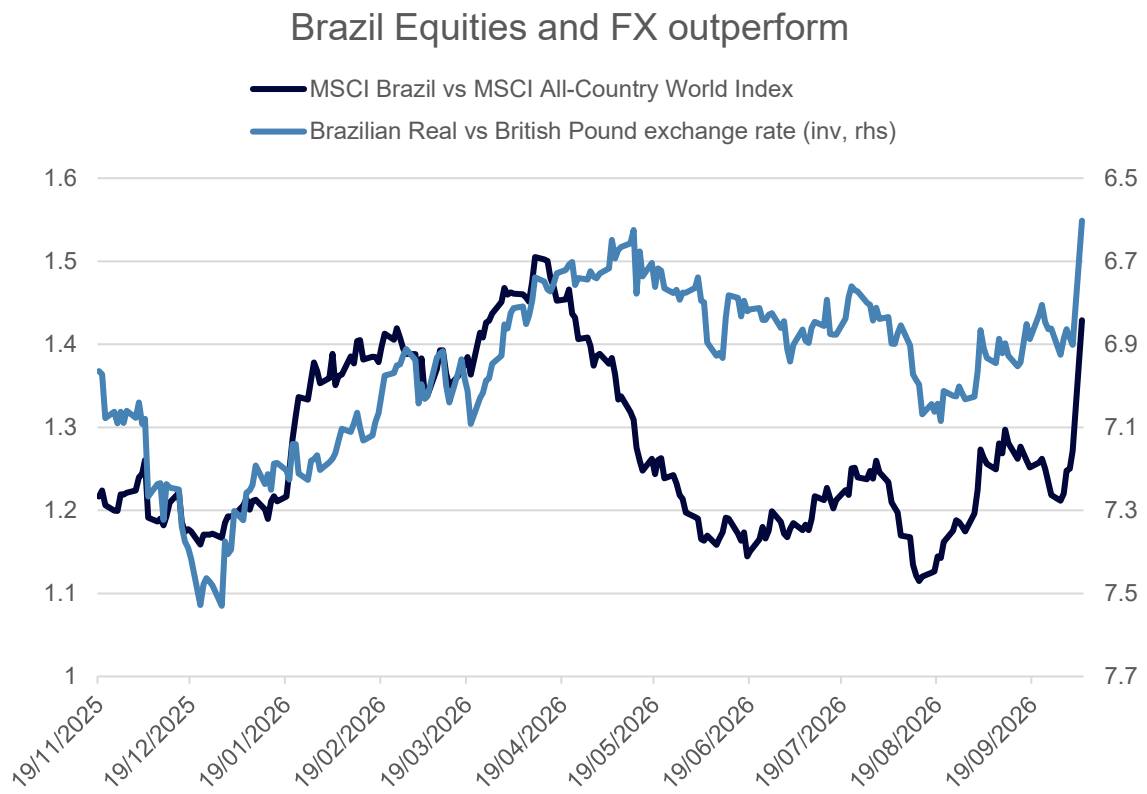
Source : Bloomberg

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Brazil – a shift to the right of the spectrum

Leads to a large move in Brazilian assets on hopes of fiscal reform





Performance in GBP to 05/10/2026

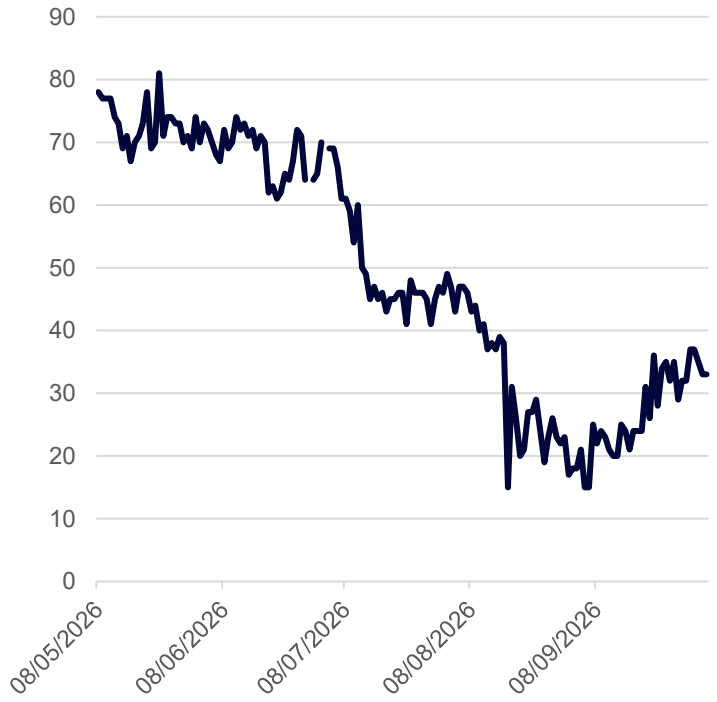
Source : Bloomberg, MSCI, Polymarket

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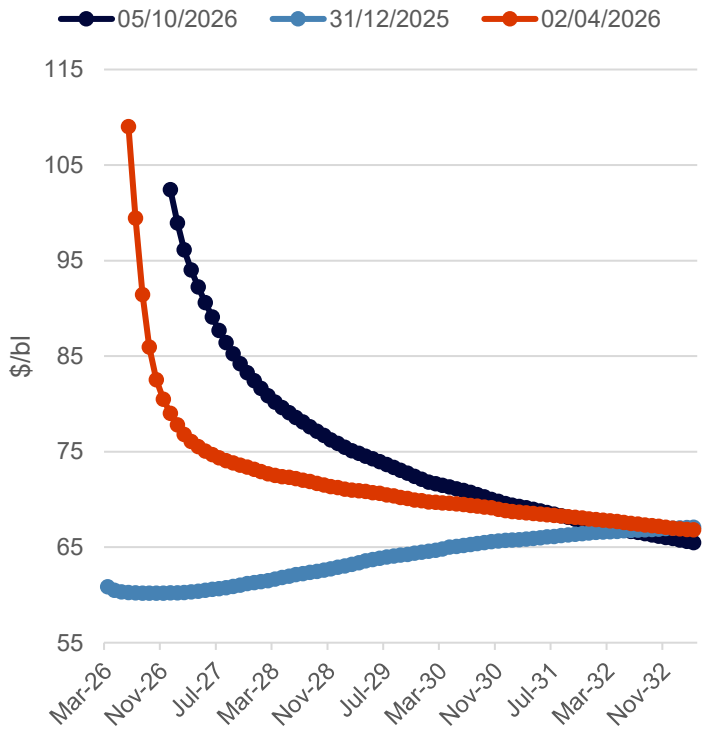
Middle East conflict – as you were

Expectations for a ceasefire have increased but prices/costs remain elevated

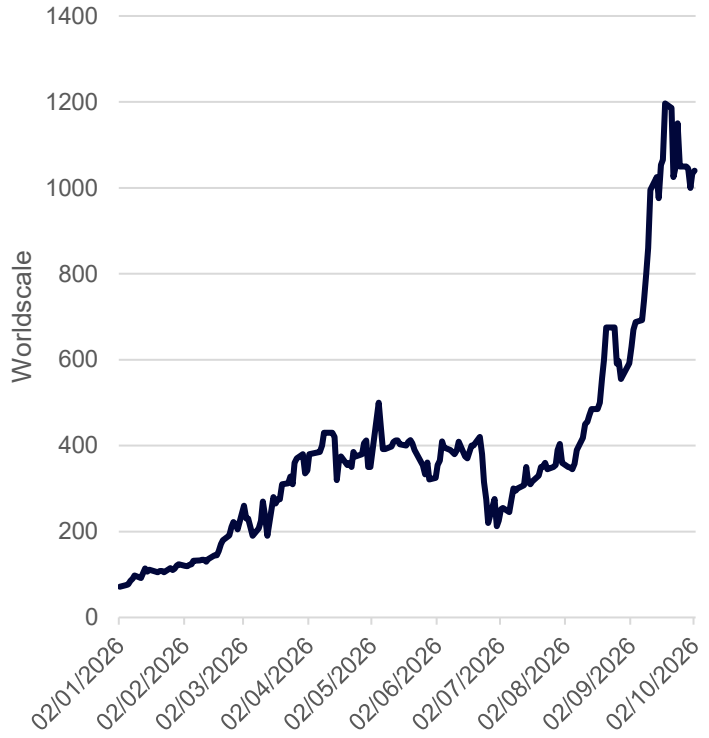
Will the US agree to a new Iranian nuclear deal before 2028?



Current and forward price of Brent Oil



Cost of Shipping (Middle East - China)



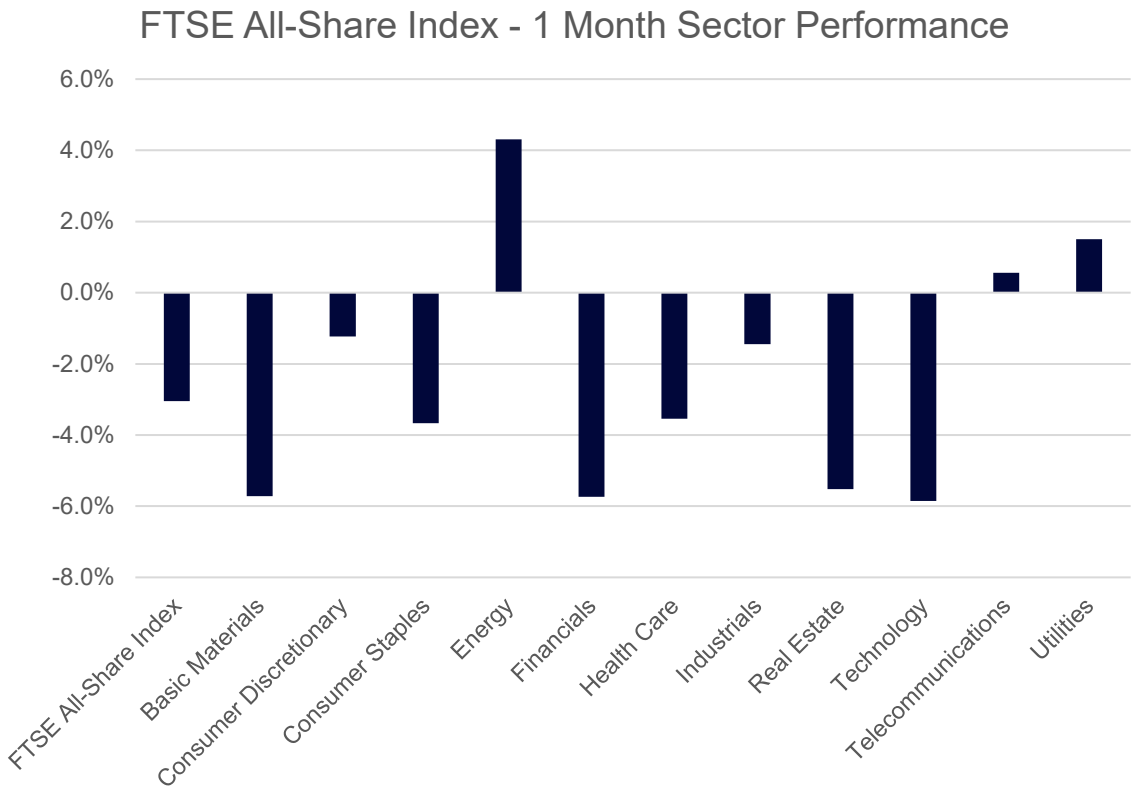
Performance in GBP to 02/10/2026

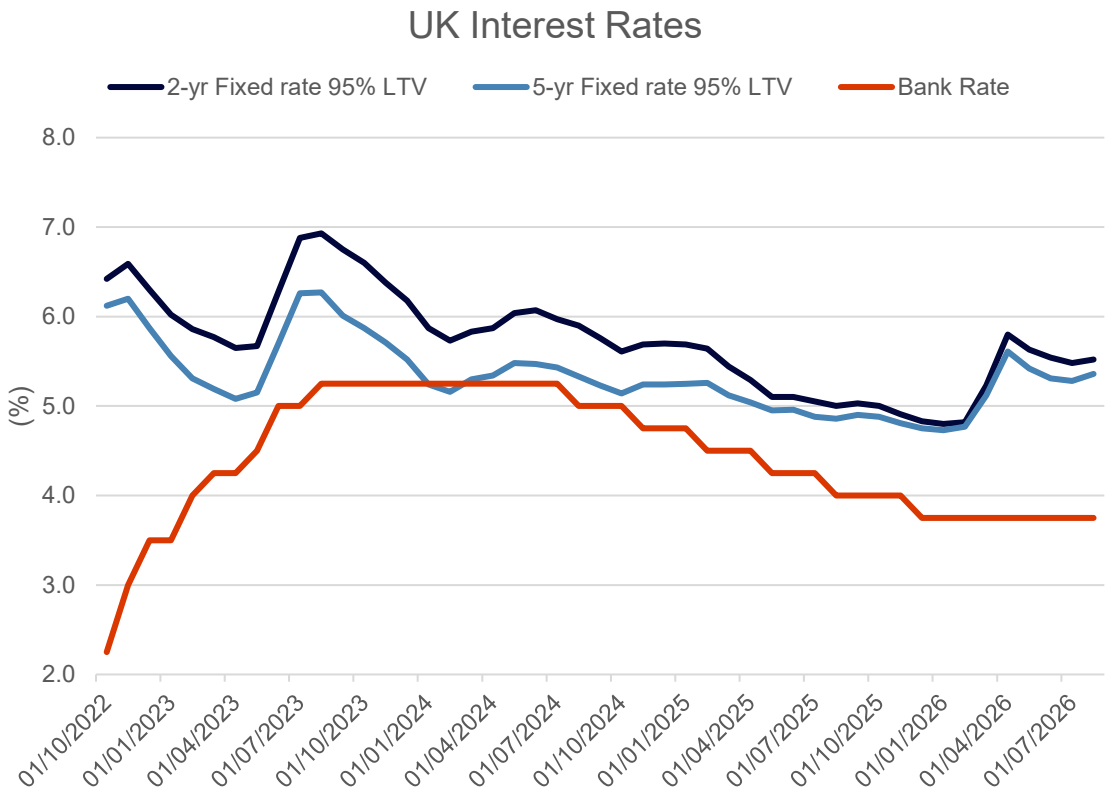
Source : Bloomberg, Kalshi, Baltic

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The UK in focus in October

The announcement of ‘Help To Buy 2.0’ didn’t help the Real Estate sector. Mortgage rates on the move





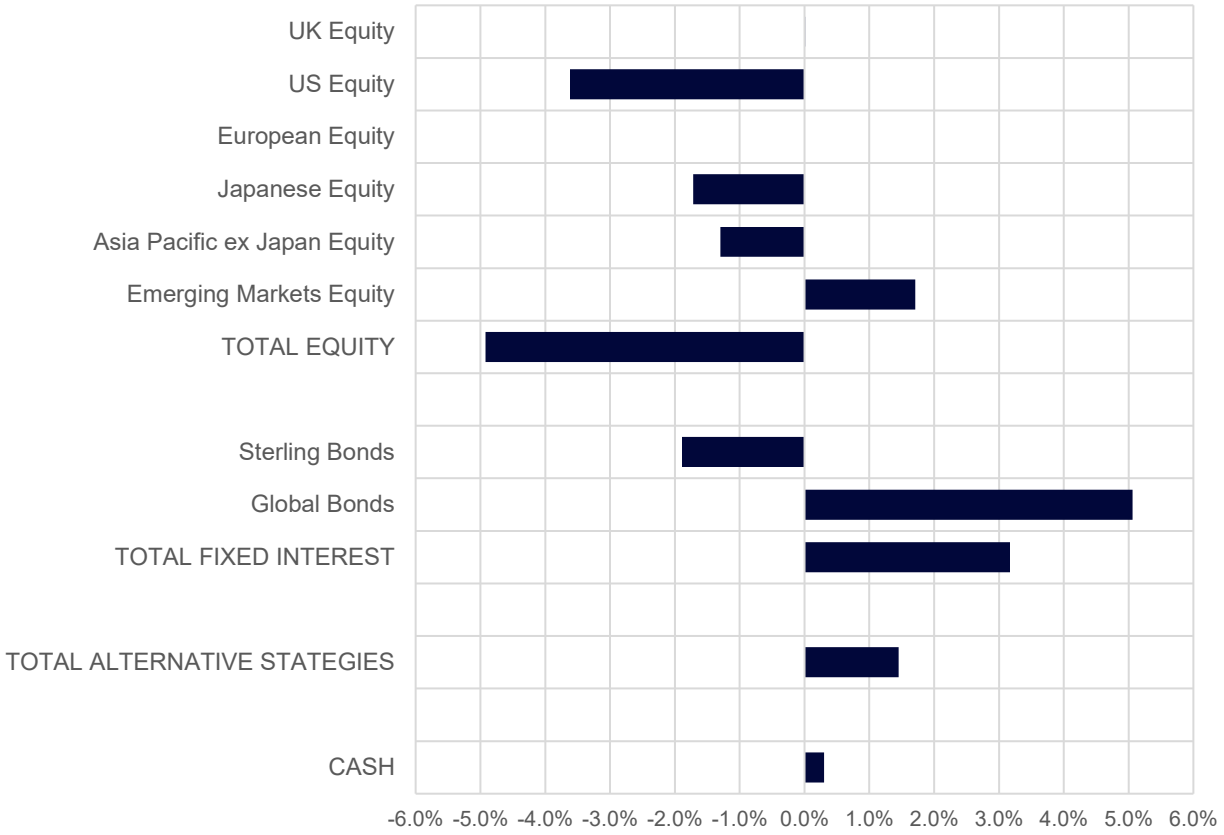
Performance in GBP to 02/10/2026

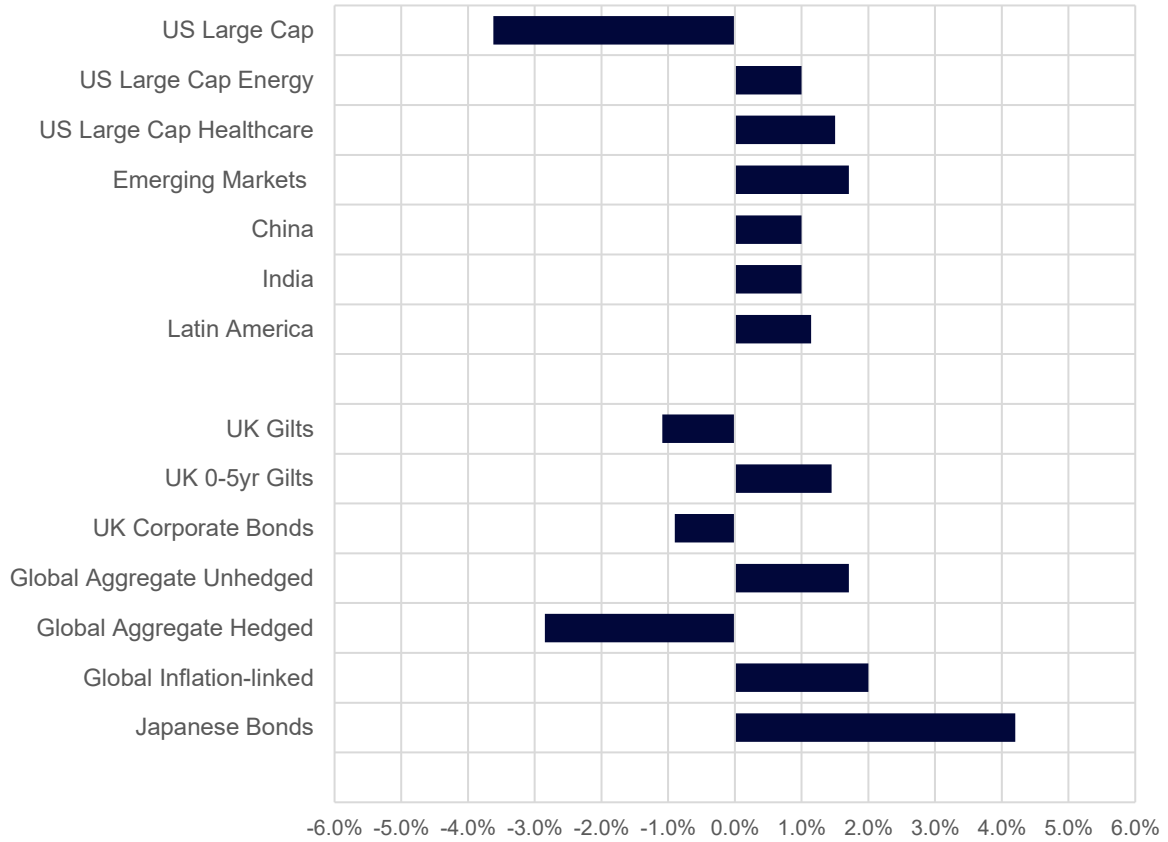
Source : Bloomberg

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Putting it all together - Agility Positioning

The energy complex is still an issue; so is concentration in Equities. Reduced Looking to add selective EM and US-Equal Weight



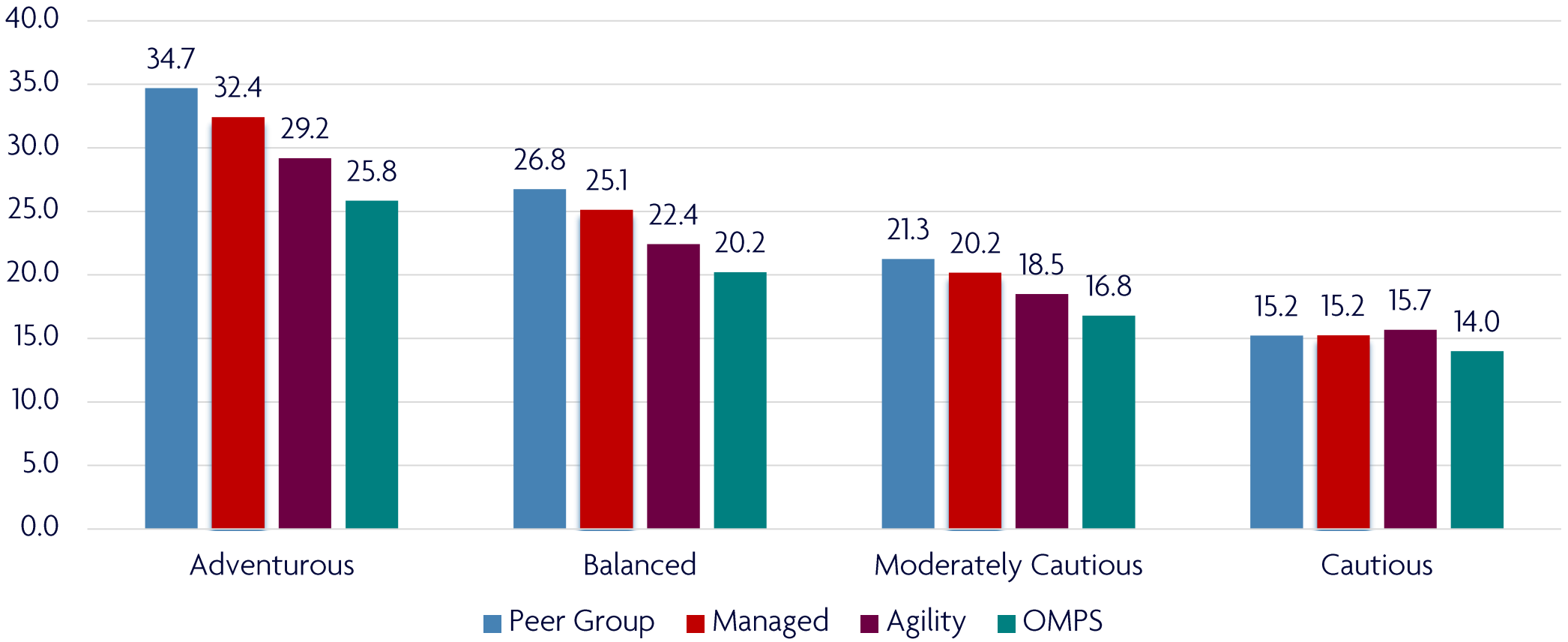


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Performance Update

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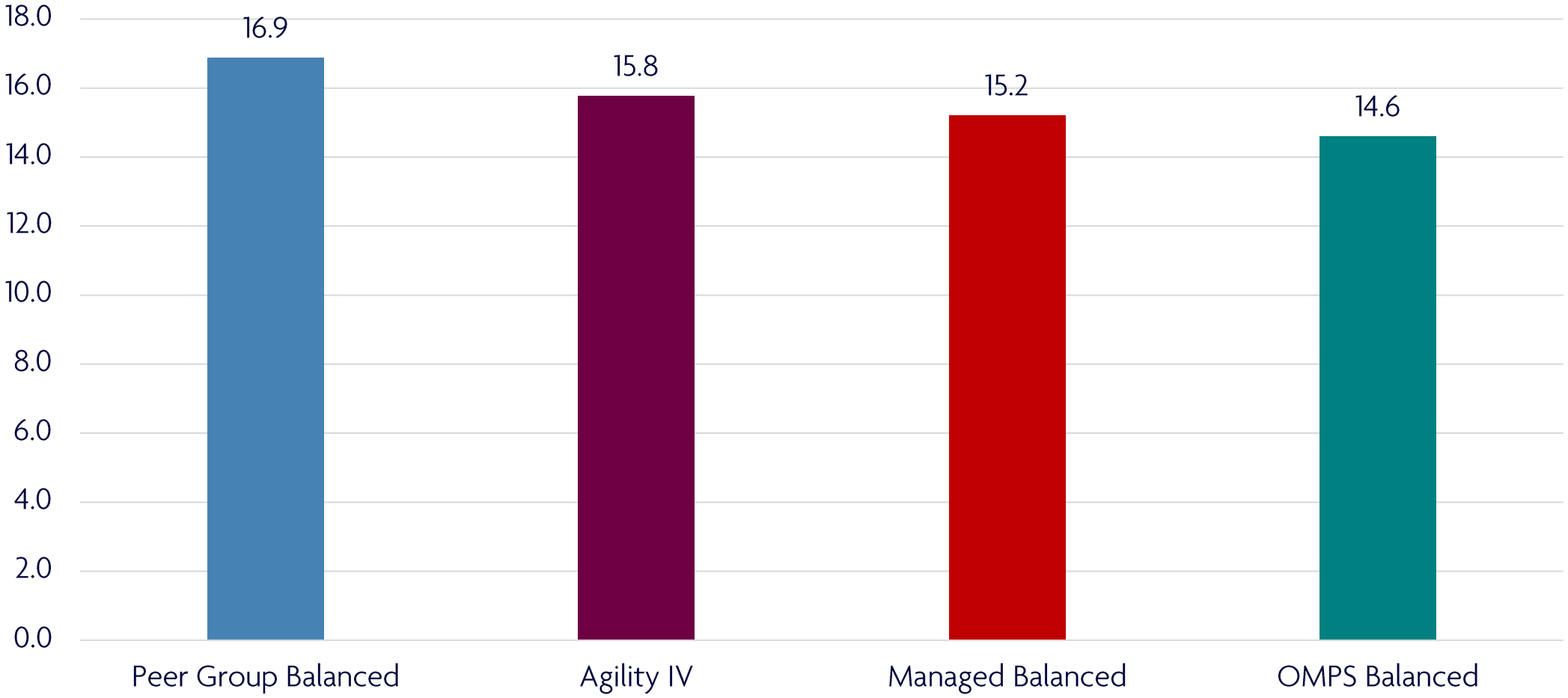
Since Agility Launch Performance



Source: FE Analytics, Omnis Investments as at 31 May 2024 – 30 September 2026

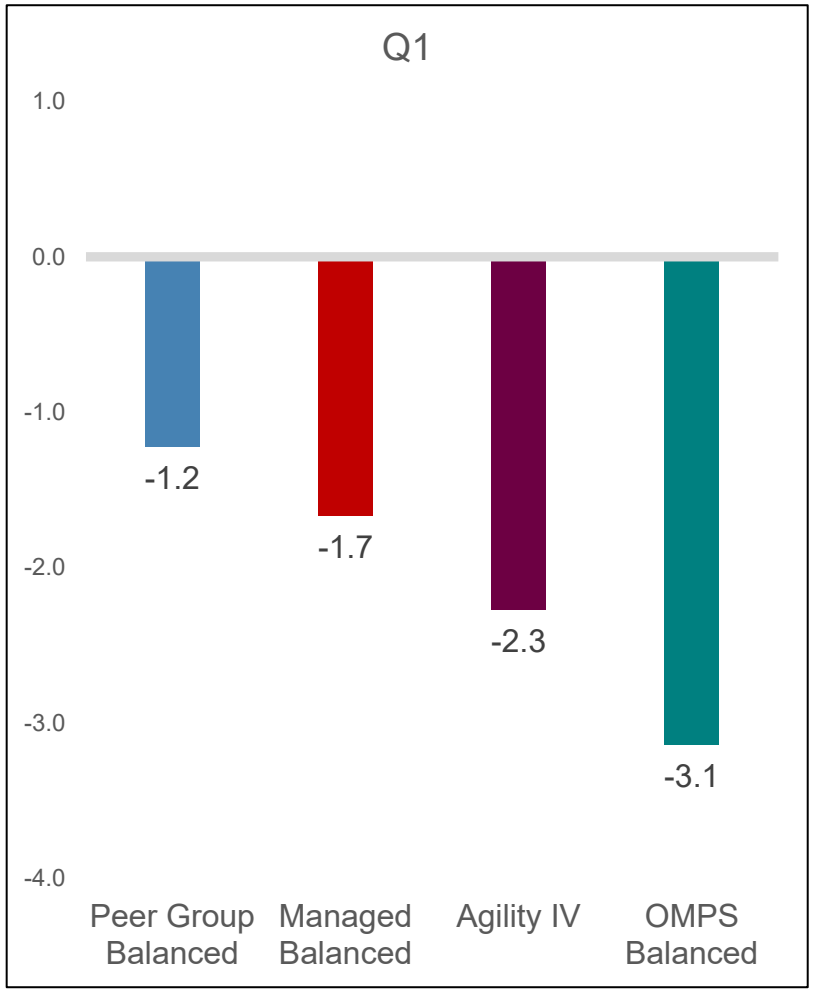
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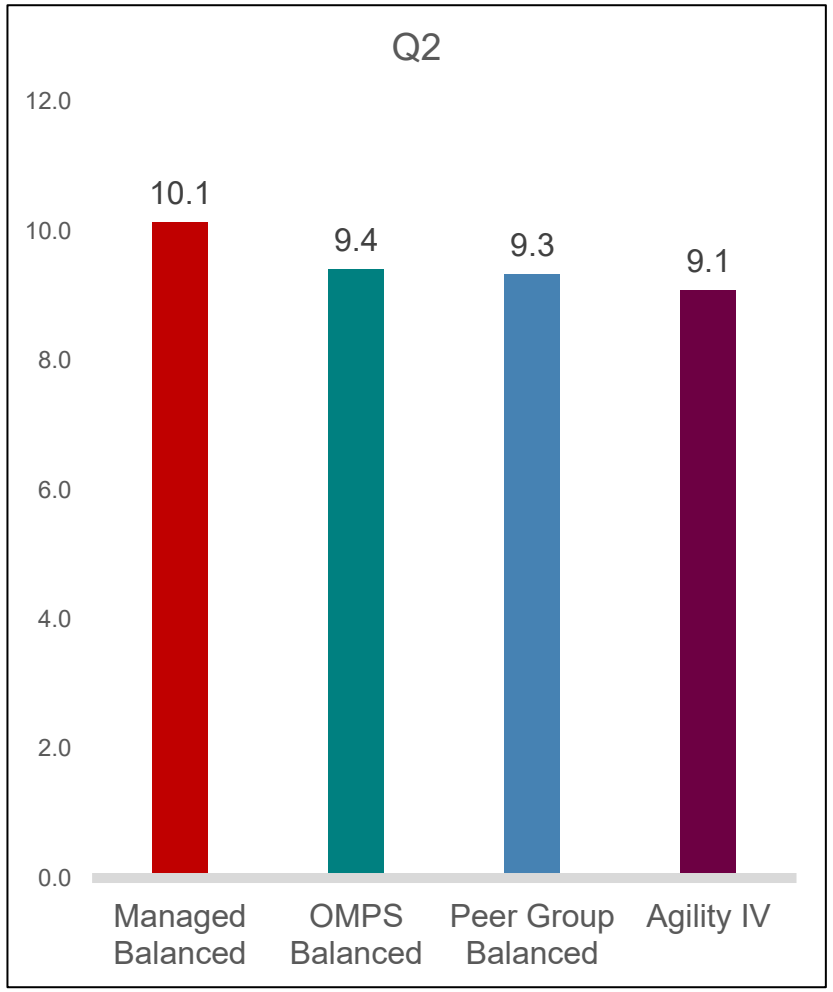
Since Agility Launch to 31 December 2025

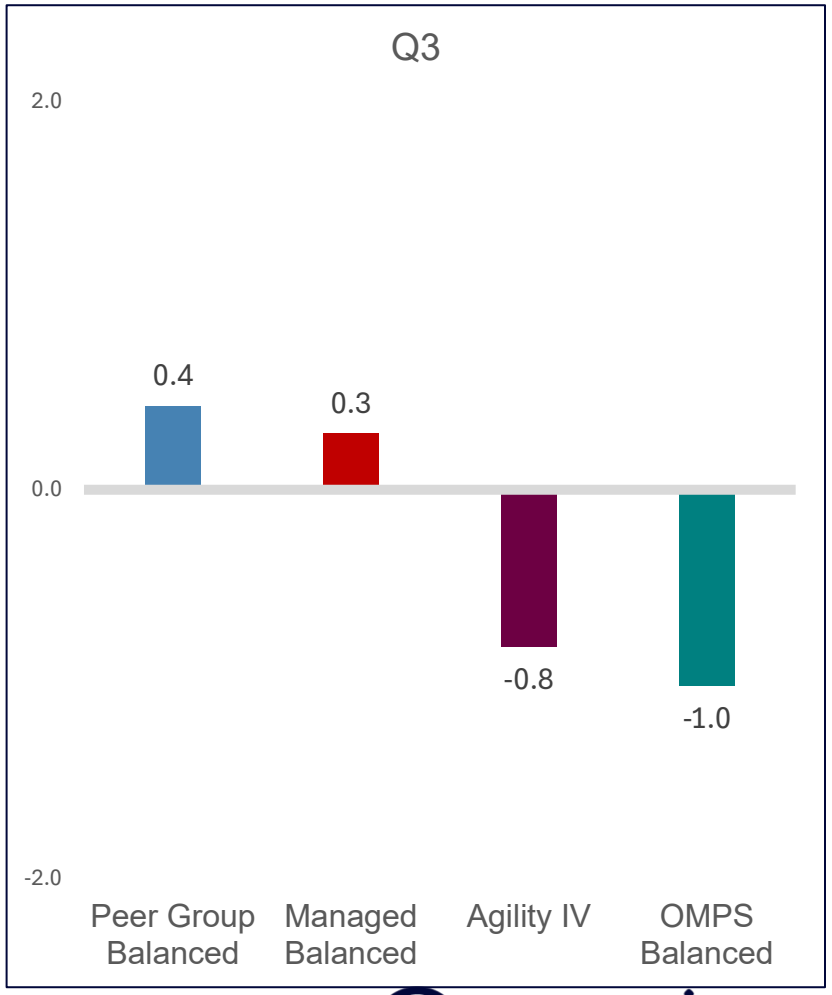


Source: FE Analytics, Omnis Investments as at 31 May 2024 – 31 December 2025

2026 Quarterly Performance







Source: FE Analytics, Omnis Investments as at 31 May 2024 – 30 September 2026

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Reminder to Register – Upcoming Events

- Graphene Webinar: 10am – 11am Thursday, 22 October
- Openwork Advice Conference: Tuesday, 3 November

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QUESTIONS



Thank you for joining us!



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