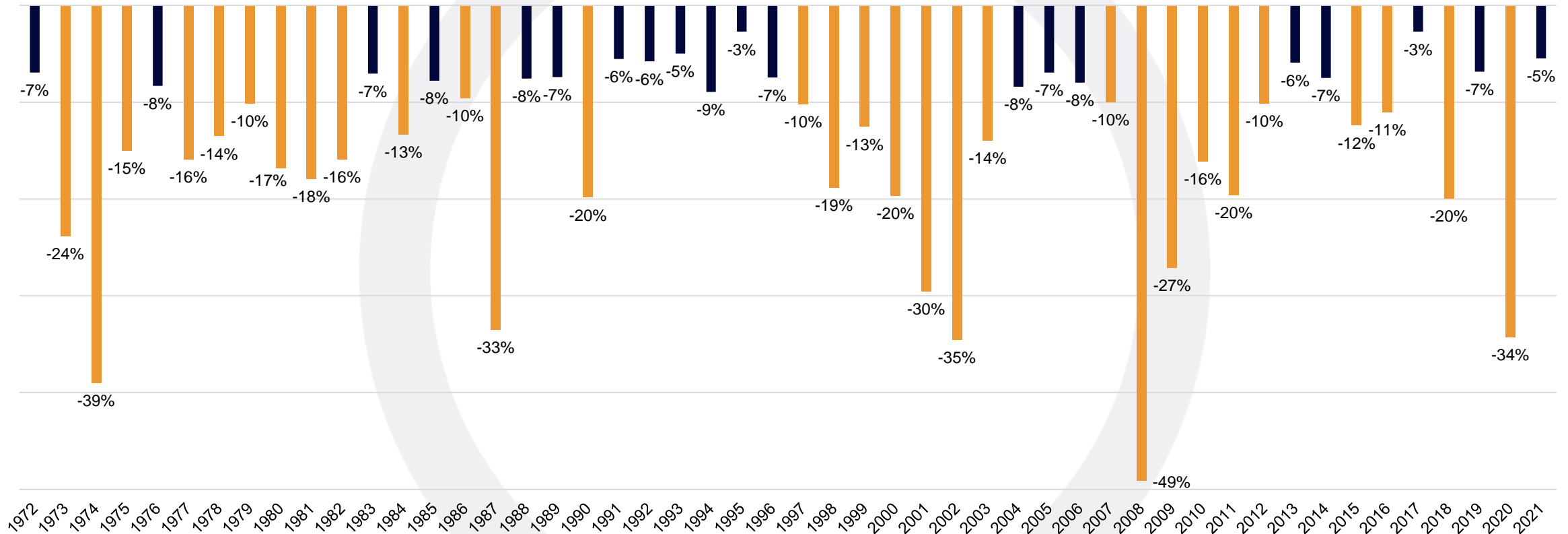


# Omnis Investments – Investment Update

March 2022

# 10%+ falls happen in more years than they don't

The biggest stock market falls of each calendar year

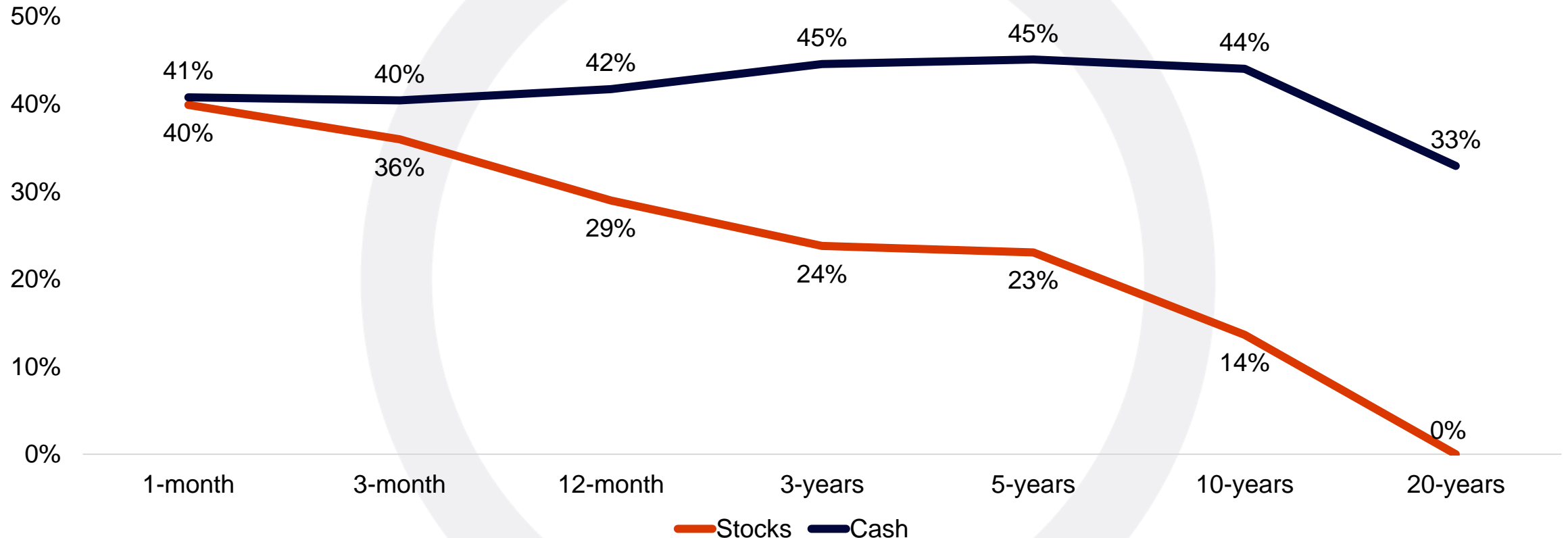


**Past performance is not a guide to the future and may not be repeated**

Source: Refinitiv and Schroders. Data to 31 December 2021 for MSCI USA index.

# Stock market investing can be risky in the short run but less so in the long-run – unlike cash!

Percentage of time where investors would have lost money in inflation-adjusted terms



**Past performance is not a guide to the future and may not be repeated**

Stocks represented by Ibbotson® SBBI® US Large-Cap Stocks, cash by Ibbotson® SBBI® US (30-Day) Treasury Bills. Data January 1926-January 2022. Source: Schroders – using Morningstar Direct, accessed via CFA institute.

# Giving up on the stock market after big falls can be a bad financial decision

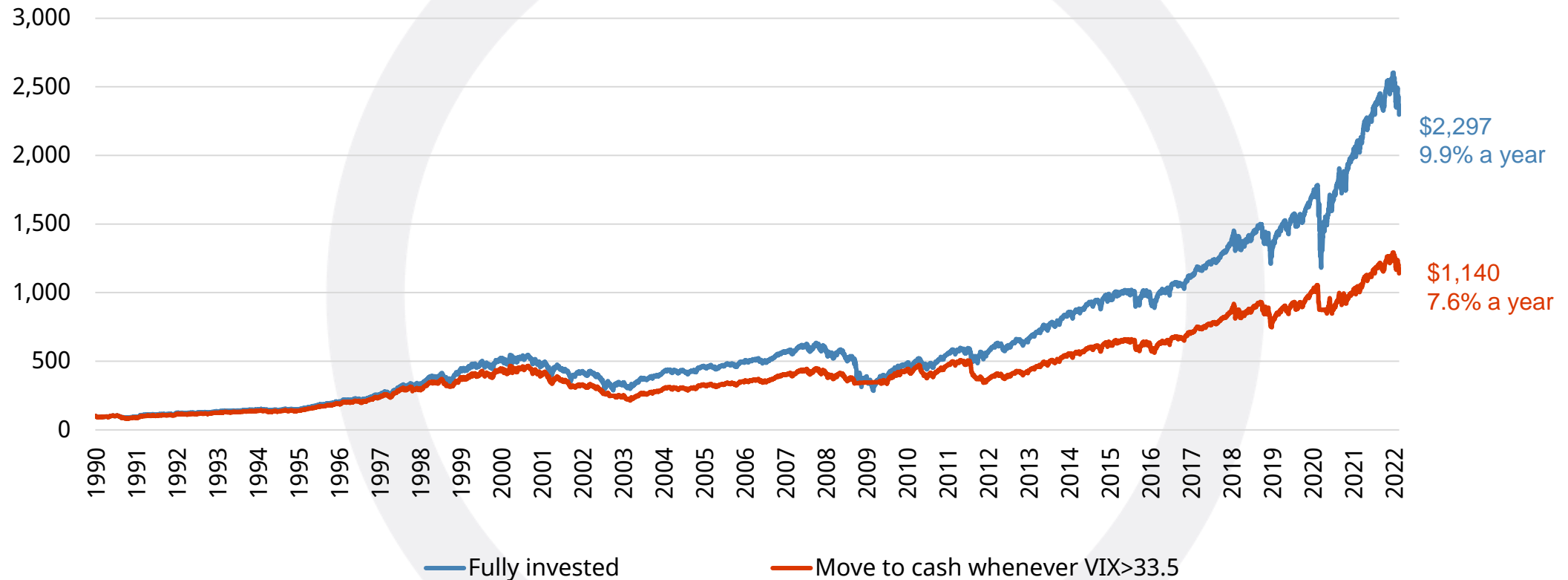
Number of years to recoup initial losses

	Stick with stocks	'Dash for cash' once market has fallen 25%
1877	1.8	6.9
1893	4.0	6.2
1903	1.1	6.2
1907	1.2	8.8
1917	1.5	6.3
1929	15.2	34.0
1970	0.8	5.0
1974	2.0	5.3
1987	1.5	4.3
2001	4.1	Still underwater
2008	4.8	Still underwater

**Past performance is not a guide to the future and may not be repeated**

Source: Schroders, Federal Reserve Bank of St. Louis, Robert Shiller. Monthly cash return 1934-2020 based on 3-month Treasury bill, secondary market rate; 1920-1934 based on yields on short-term United States securities; 1871-1920 based on 1-year interest rate. 1871-1920 data only available annually so a constant return on cash has been assumed for all months during this period. Other data is monthly. All analysis is based on nominal amounts.

# Growth of \$100 fully invested in stocks vs switch to cash when volatility is high!



## Past performance is not a guide to the future and may not be repeated

Note: Levels in excess of 33.5 represent the top 5% of experience for the Vix. Portfolio is rebalanced on a daily basis depending on the level of the Vix at the previous close. Data to 23 February 2022. Figures do not take account of any costs, including transaction costs. Source: Schroders, Refinitiv

# For any questions, please speak to your financial adviser

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