

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	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
FTSE All Share	UK Equities	40.3	25.8	5.1	26.4	17.6	27.6	1.4	19.4	26.7	29.6
		US Smaller Cos.	EM Equities	Global Bonds	US Equities	Asia Equities	US Equities	Cash	US Equities	US Equities	Asia Equities
Deutsche Numis Smaller Companies(Ex-ICs)	UK Smaller Companies	33.7	20.3	1.1	25.2	17.2	21.9	0.3	15.7	14.0	27.9
		US Equities	Asia Equities	US Equities	UK Smaller Cos.	US Equities	UK Smaller Cos.	UK Equities	EU Equities	US Smaller Cos.	EU Equities
Russell 1000	US Equities	33.1	19.5	0.6	22.8	16.3	19.3	-4.8	13.3	10.1	25.1
		EM Equities	UK Smaller Cos.	Cash	US Smaller Cos.	US Smaller Cos.	US Smaller Cos.	Japanese Equities	Japanese Equities	Japanese Equities	EM Equities
Russell 2500	US Smaller Companies	31.7	17.5	0.5	20.5	15.0	18.3	-5.3	10.8	10.0	24.0
		Asia Equities	EU Equities	Gilts	EU Equities	EM Equities	UK Equities	Asia Equities	US Smaller Cos.	EM Equities	UK Equities
FTSE World Europe ex UK	European Equities	22.7	14.4	-0.1	19.2	11.1	17.4	-6.4	10.1	9.5	17.1
		Japanese Equities	Japanese Equities	Short-Dated Bonds	UK Equities	Japanese Equities	EU Equities	Global Bonds	UK Smaller Cos.	UK Smaller Cos.	Japanese Equities
FTSE World Asia Pacific ex Japan	Asian (ex-Japan) Equities	21.9	13.1	-2.3	15.6	9.3	9.2	-7.0	9.9	9.5	13.6
		Global Bonds	UK Equities	Corp Bonds	Balanced Portfolio	Corp Bonds	Balanced Portfolio	EU Equities	Corp Bonds	UK Equities	Balanced Portfolio
FTSE Japan	Japanese Equities	20.1	11.2	-4.4	14.9	8.8	8.2	-7.3	9.0	9.3	12.7
		Balanced Portfolio	US Equities	US Smaller Cos.	Asia Equities	Gilts	Asia Equities	Short-Dated Bonds	Balanced Portfolio	Balanced Portfolio	UK Smaller Cos.
MSCI Emerging Markets	Emerging Market Equities	19.7	10.8	-4.4	14.8	8.6	2.5	-8.1	8.3	7.8	9.3
		EU Equities	Balanced Portfolio	Balanced Portfolio	Japanese Equities	EU Equities	Japanese Equities	US Smaller Cos.	Asia Equities	Asia Equities	US Equities
ICE BofA UK Gilt	Gilts	16.8	6.7	-6.8	14.3	5.6	0.1	-8.3	7.9	5.1	7.0
		UK Equities	US Smaller Cos.	Asia Equities	EM Equities	Global Bonds	Cash	Balanced Portfolio	UK Equities	Cash	Corp Bonds
ICE BofA Sterling Corporate	Corporate Bonds	11.9	5.2	-7.6	11.4	5.3	-1.0	-8.9	6.9	4.1	6.4
		Corp Bonds	Corp Bonds	Japanese Equities	Corp Bonds	Balanced Portfolio	Short-Dated Bonds	US Equities	Short-Dated Bonds	Short-Dated Bonds	Short-Dated Bonds
ICE BofA 15 Year Sterling Non Gilt	Short-Dated Bonds	10.6	1.9	-8.9	7.3	3.1	-1.3	-9.6	4.6	3.0	5.0
		UK Smaller Cos.	Gilts	EM Equities	Gilts	Short-Dated Bonds	EM Equities	EM Equities	Cash	EU Equities	Gilts
ICE BofA Global Broad Market	Global Bonds	10.6	1.8	-9.5	3.9	0.2	-3.3	-17.9	4.1	2.1	4.2
		Gilts	Short-Dated Bonds	EU Equities	Short-Dated Bonds	Cash	Corp Bonds	UK Smaller Cos.	EM Equities	Corp Bonds	Cash
BoE Sterling Overnight Index Average	Cash	4.2	0.3	-9.5	2.8	-4.3	-4.4	-19.9	3.7	-0.3	4.2
		Short-Dated Bonds	Cash	UK Equities	Global Bonds	UK Smaller Cos.	Global Bonds	Corp Bonds	Gilts	Global Bonds	US Smaller Cos.
Blend of Indices*	Balanced Portfolio	0.4	-2.3	-15.4	0.7	-9.8	-5.3	-25.1	-0.4	-4.1	0.6
		Cash	Global Bonds	UK Smaller Cos.	Cash	UK Equities	Gilts	Gilts	Global Bonds	Gilts	Global Bonds

*Balanced portfolio uses the Omnis Balanced Strategic Asset Allocation. Full details of this breakdown is available here: <https://omnisinvest.s3.amazonaws.com/downloads/Omnis-Our-Strategic-Asset-Allocation-explained.pdf>

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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