

Risk and Reward per Asset Class 2021/22 and Comparative Years.

Asset Class (Local Authority Sector unless stated)	2020	2021	YTD-July 2022	Average Annual Return (since 2005)
UK All Companies	-6.22%	17.12%	-7.91%	10.0%
UK Equity Income	-10.78%	18.42%	-2.03%	9.63%
Mixed Investments 40-85% Shares	5.16%	11.16%	-7.74%	7.58%
UK Property (IPD/AREF, UK PFI Other Balanced Funds)	-1.00%	18.00%	10.10%	6.64%
Mixed Investments 20-60% Shares	3.50%	7.45%	-7.34%	5.63%
UK Index Linked Gilts	12.04%	3.95%	-21.01%	4.98%
£ Corporate Bond	7.75%	-1.90%	-10.06%	4.21%
Mixed Investments 0-35% Shares	3.80%	2.93%	-7.49%	4.15%
RPI	1.20%	7.50%	12.30%	3.89%
Bloomberg Barclays £ 0-5yr Corporate Bond Index	3.52%	-0.50%	-3.23%	3.65%
UK Gilts	9.00%	-5.29%	-12.83%	3.07%
FT\$E Conventional Gilt up to 5yr Index	1.52%	-1.63%	-1.50%	2.33%
Money Market Funds	0.36%	0.08%	0.73%	1.66%
3 month SONIA		0.05%	0.50%	0.03%
12 month SONIA		0.06%	0.19%	0.01%

Key :

Equity

Multi-Asset

Physical

Fixed Income

Money Market

Economic Data Index

Source: Link Asset Services Ltd

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