

Periodic Table of Asset Class Returns

Which asset class is best to own? Which will lead the market? Symmetry's objective is to own them all.

	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Emerging Market Small	84.3%	9.7%	59.9%	35.0%	107.2%	22.0%	40.1%	37.0%	36.9%	28.6%	72.9%	31.0%	40.6%	13.0%	82.3%	42.4%	34.5%	40.0%	44.0%
Emerging Markets	65.0%	8.9%	50.0%	28.1%	91.2%	16.2%	37.6%	23.0%	33.9%	23.0%	68.4%	12.6%	34.0%	8.6%	78.0%	39.8%	28.9%	36.7%	39.9%
1-3 Year Global Bonds	54.3%	8.6%	43.0%	16.1%	74.9%	15.9%	33.2%	22.4%	33.4%	12.0%	60.0%	9.2%	12.4%	6.3%	74.5%	38.0%	24.9%	36.0%	37.9%
Int'l Small Cap	38.1%	7.3%	40.7%	15.1%	46.9%	14.6%	26.7%	20.0%	24.0%	11.7%	33.1%	7.6%	7.6%	4.2%	70.2%	33.2%	19.5%	33.0%	10.1%
S & P 500	31.5%	2.5%	34.8%	11.4%	45.6%	3.5%	16.3%	19.3%	19.7%	10.2%	32.8%	7.3%	7.3%	3.6%	69.1%	33.1%	19.3%	32.6%	6.9%
Int'l Small Cap	30.8%	1.9%	30.5%	10.3%	34.4%	3.4%	16.1%	12.3%	8.4%	9.8%	31.7%	4.0%	6.6%	3.4%	86.1%	30.8%	15.1%	27.8%	6.8%
US Large Cap	27.5%	3.1%	25.5%	7.9%	28.6%	2.7%	12.2%	10.2%	8.3%	9.2%	21.0%	1.6%	6.3%	2.0%	60.9%	27.3%	14.0%	25.6%	6.7%
Int'l Large Cap	18.2%	-10.6%	23.8%	7.6%	24.5%	2.5%	11.2%	8.5%	6.6%	7.3%	20.3%	-3.1%	3.8%	-3.0%	56.3%	26.0%	9.7%	21.9%	6.2%
5 Year Treas	13.3%	-17.1%	15.3%	7.2%	20.1%	1.3%	10.3%	7.1%	5.9%	5.9%	7.0%	-6.4%	2.2%	-3.7%	36.4%	17.7%	4.9%	21.7%	6.0%
US Small Cap	11.5%	-17.9%	12.3%	6.2%	15.1%	1.0%	7.9%	6.0%	0.3%	-8.2%	4.4%	-9.1%	-2.4%	-6.0%	36.2%	16.7%	4.5%	18.1%	6.0%
1 Year Treas	9.9%	-21.6%	10.1%	4.7%	11.2%	-0.3%	3.9%	5.8%	-11.6%	-10.0%	4.2%	-11.4%	-2.7%	-11.7%	28.7%	10.9%	3.6%	15.8%	5.5%
1-3 Year Global Bonds	8.8%	-22.6%	9.8%	-4.7%	10.4%	-2.5%	2.7%	5.5%	-15.1%	-13.4%	4.0%	-13.1%	-7.2%	-13.8%	2.4%	3.6%	3.3%	4.3%	7.2%
US Small Cap	8.2%	-23.4%	8.7%	-9.9%	10.1%	-3.2%	-5.2%	5.5%	-16.4%	-17.0%	2.8%	-30.6%	-11.9%	-14.0%	2.0%	2.3%	2.9%	4.3%	-12.2%
3-5 Year Global Bonds	7.8%	-26.1%	5.8%	-20.6%	6.2%	-5.1%	-7.6%	4.4%	-16.9%	-21.2%	-1.8%	-53.4%	-15.4%	-22.1%	1.9%	1.9%	2.4%	3.8%	-17.6%
Real Estate Stocks	2.7%	-27.4%	5.2%	-21.4%	3.7%	-7.3%	-9.2%	2.1%	-21.9%	-25.3%	-2.6%	-33.7%	-17.8%	-30.3%	1.5%	0.8%	1.4%	3.2%	-18.4%

Best ← → Worst

Diversification seeks to improve performance by spreading your investment dollars into various asset classes to add balance to your portfolio. Using this methodology, however, does not guarantee a profit or protection from loss in a declining market. Past performance does not guarantee future results. The above information is supplemented by the attached disclosure. Please refer to the back of this page. The data should be reviewed in conjunction with the disclosure of the performance information.