



evidence based investments



Independent Financial Advisers

EBI GLOBAL

Past Significant Virus Outbreaks

ebi.co.uk

blackdownfinancial.co.uk

INTRODUCTION

This document provides an analysis of the EBI Global portfolios during past significant virus outbreaks.

- SARS: January 2003 - March 2003
- Avian Influenza: January 2004 - August 2004
- MERS: September 2012 - November 2012
- Ebola: December 2013 - February 2014
- Zika: November 2015 - February 2016
- Coronavirus: January 2020 - Present

For more information about EBI Model Portfolios, or any of the other products and services that EBI provide, please contact us:

EBI Portfolios Limited authorised and regulated in the UK by the Financial Conduct Authority. Registration number 581079.

EBI Portfolios Limited
Suite 7, Beecham House, Beecham Business Park
Northgate, Aldridge, West Midlands, WS9 8TZ

+44 (0) 1922 472 226

enquiries@ebi.co.uk

Blackdown Financial
Winchester House, Corporation Street
Taunton, Somerset, TA1 4AJ

T: 01823 321616
E: enquiries@blackdownfinancial.co.uk



evidence based investments



Independent Financial Advisers

ebi.co.uk

blackdownfinancial.co.uk

FURTHER INFORMATION



The use of simulated returns in this document

The EBI Global range of portfolios was launched in August 2017. To help the reader gain a better picture of the characteristics of each portfolio and an idea of how they might have performed, EBI has included historical simulated data. This was achieved by creating a series of returns for each asset class used in EBI's portfolios. They are based on the Benchmark Index data for a current live fund (or closest available equivalent) less an assumption for costs until a live fund data can be substituted. This produces a continuous set of monthly returns. We refer to this live fund data spliced with cost adjusted index data as a Fundex. This can give an indication to the returns that may have been obtained since January 1956. For a detailed explanation please refer to the 'Disclosures and data sources for simulated returns of EBI fundexes and EBI portfolios'.

Rebalancing

The performance information presented in any of the charts or tables represents Fundex returns from January 1956 to the date specified using the strategy of buying, holding and annually rebalancing globally diversified portfolios. Back tested Simulated Returns are hypothetical (they do not reflect trading in actual accounts) and are provided for informational purposes to indicate potential historical performance had the portfolios been available over the relevant period.

Reliability of the simulated data

As can be seen from above, it's not actually possible to simulate 'exactly' what the returns of a portfolio would have been historically. However, the benefit of imperfect but highly representative simulated data is in EBI's opinion far more valuable than no data at all.

Past performance is not a reliable indicator of future results. The value of investments, and the income from them may fall or rise and investors may get back less than they invested.

All data was compiled via Morningstar Direct

ebi.co.uk

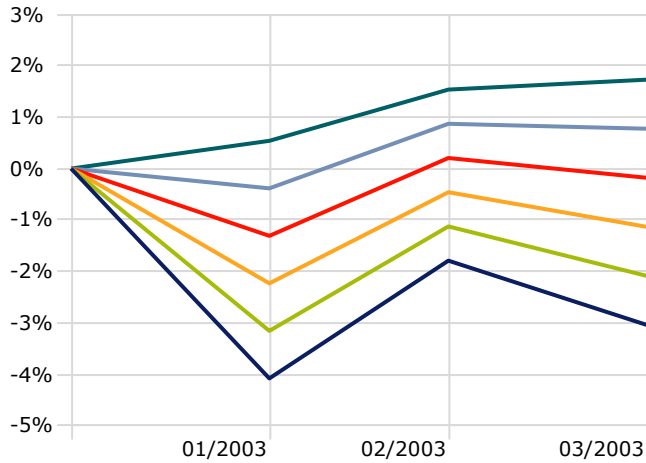
blackdownfinancial.co.uk

How EBI Global Portfolios Behaved in Past Significant Virus Outbreaks



SARS: January 2003 - March 2003

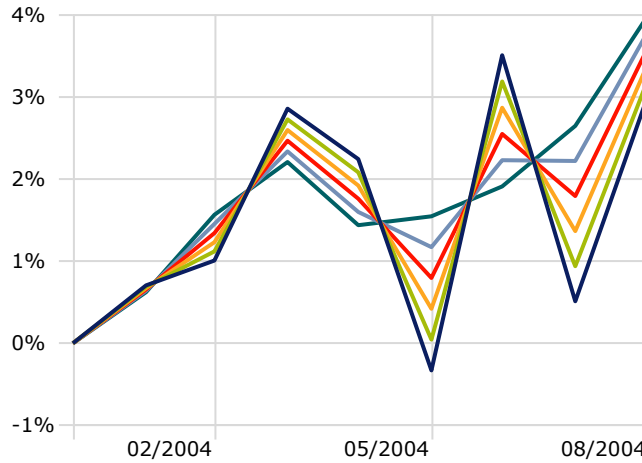
Time Period: 01/01/2003 to 31/03/2003



Global 100	-3.0%	Global 80	-2.1%	Global 60	-1.1%
Global 40	-0.2%	Global 20	0.8%	Global Bond	1.7%

Avian Influenza: January 2004 - August 2004

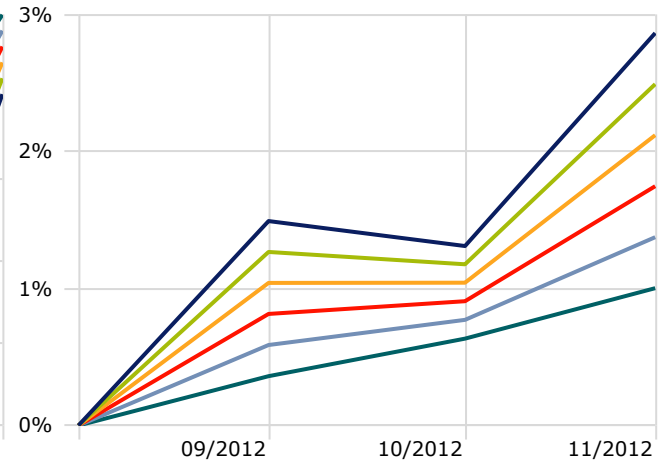
Time Period: 01/01/2004 to 31/08/2004



Global 100	3.0%	Global 80	3.2%	Global 60	3.4%
Global 40	3.6%	Global 20	3.8%	Global Bond	4.0%

MERS: September 2012 - November 2012

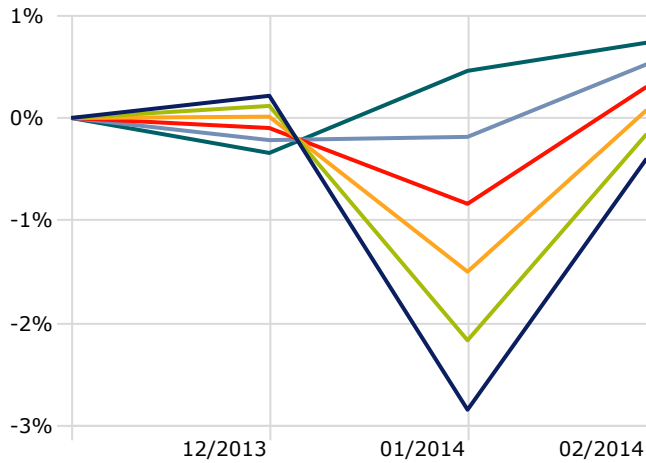
Time Period: 01/09/2012 to 30/11/2012



Global 100	2.9%	Global 80	2.5%	Global 60	2.1%
Global 40	1.7%	Global 20	1.4%	Global Bond	1.0%

Ebola: December 2013 - February 2014

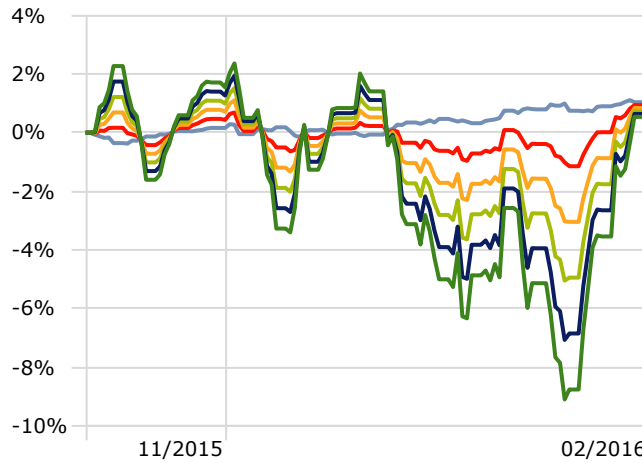
Time Period: 01/12/2013 to 28/02/2014



Global 100	-0.4%	Global 80	-0.2%	Global 60	0.1%
Global 40	0.3%	Global 20	0.5%	Global Bond	0.7%

Zika: November 2015 - February 2016

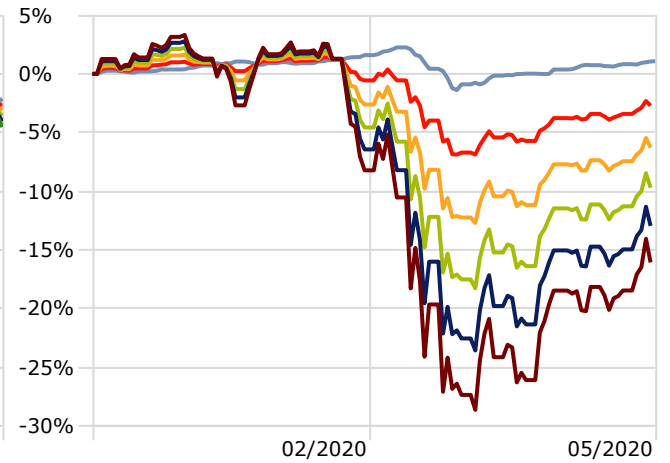
Time Period: 01/11/2015 to 29/02/2016



Global 100	0.2%	Global 80	0.4%	Global 60	0.6%
Global 40	0.8%	Global 20	1.0%	Global Bond	1.2%

Coronavirus: January 2020 -

Time Period: 01/01/2020 to 01/05/2020



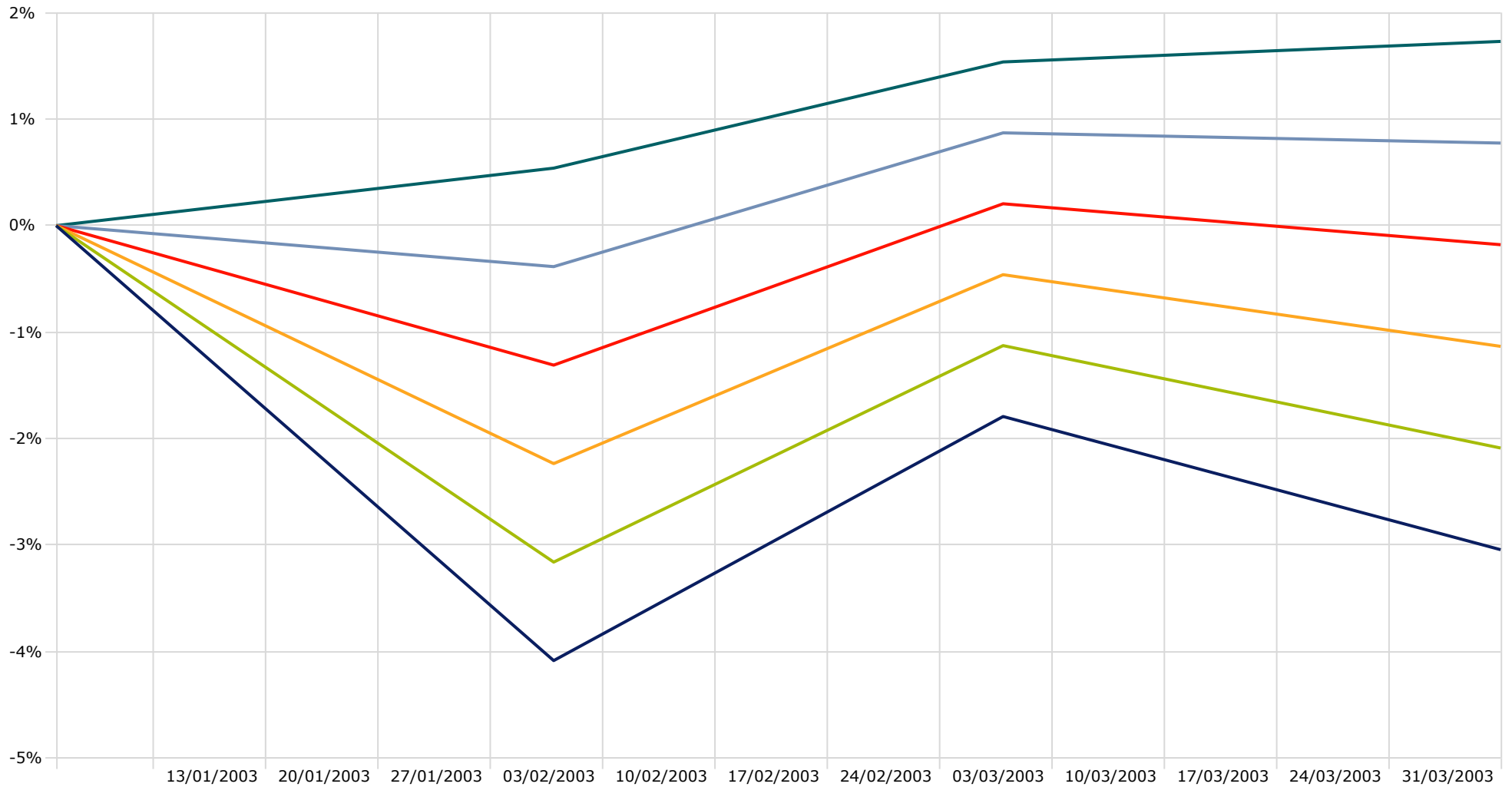
Global 100	-16.0%	Global 80	-12.9%	Global 60	-9.7%
Global 40	-6.3%	Global 20	-2.7%	Global Bond	1.1%

How EBI Global Portfolios Behaved in Past Significant Virus Outbreaks



SARS: January 2003 - March 2003

Time Period: 01/01/2003 to 31/03/2003



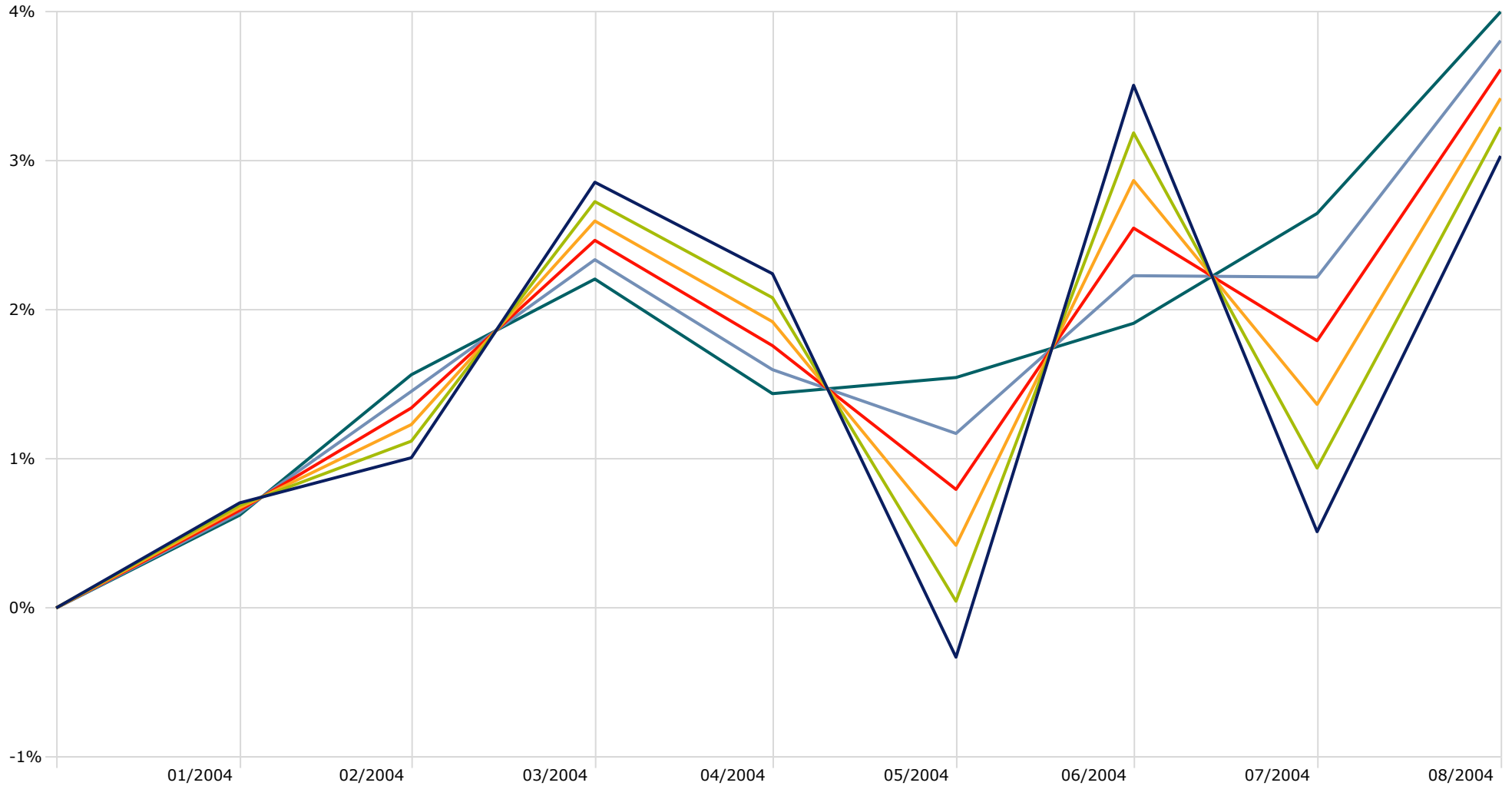
Global 100	-3.0%	Global 80	-2.1%	Global 60	-1.1%
Global 40	-0.2%	Global 20	0.8%	Global Bond	1.7%

How EBI Global Portfolios Behaved in Past Significant Virus Outbreaks



Avian Influenza: January 2004 - August 2004

Time Period: 01/01/2004 to 31/08/2004



Global 100

3.0% Global 80

3.2% Global 60

3.4%

Global 40

3.6% Global 20

3.8% Global Bond

4.0%

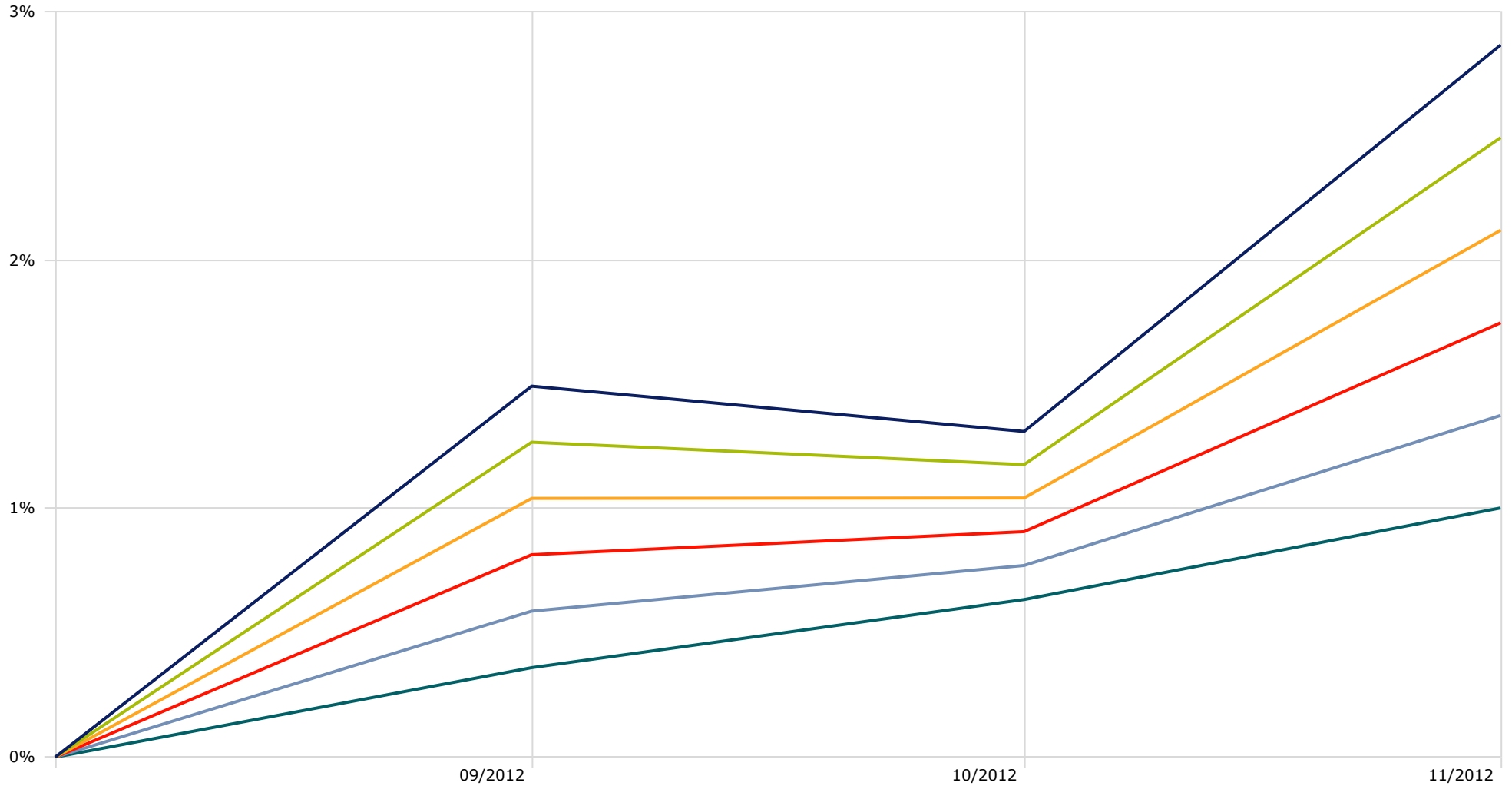
Source: Morningstar Direct

How EBI Global Portfolios Behaved in Past Significant Virus Outbreaks



MERS: September 2012 - November 2012

Time Period: 01/09/2012 to 30/11/2012



Global 100

2.9% Global 80

2.5% Global 60

2.1%

Global 40

1.7% Global 20

1.4% Global Bond

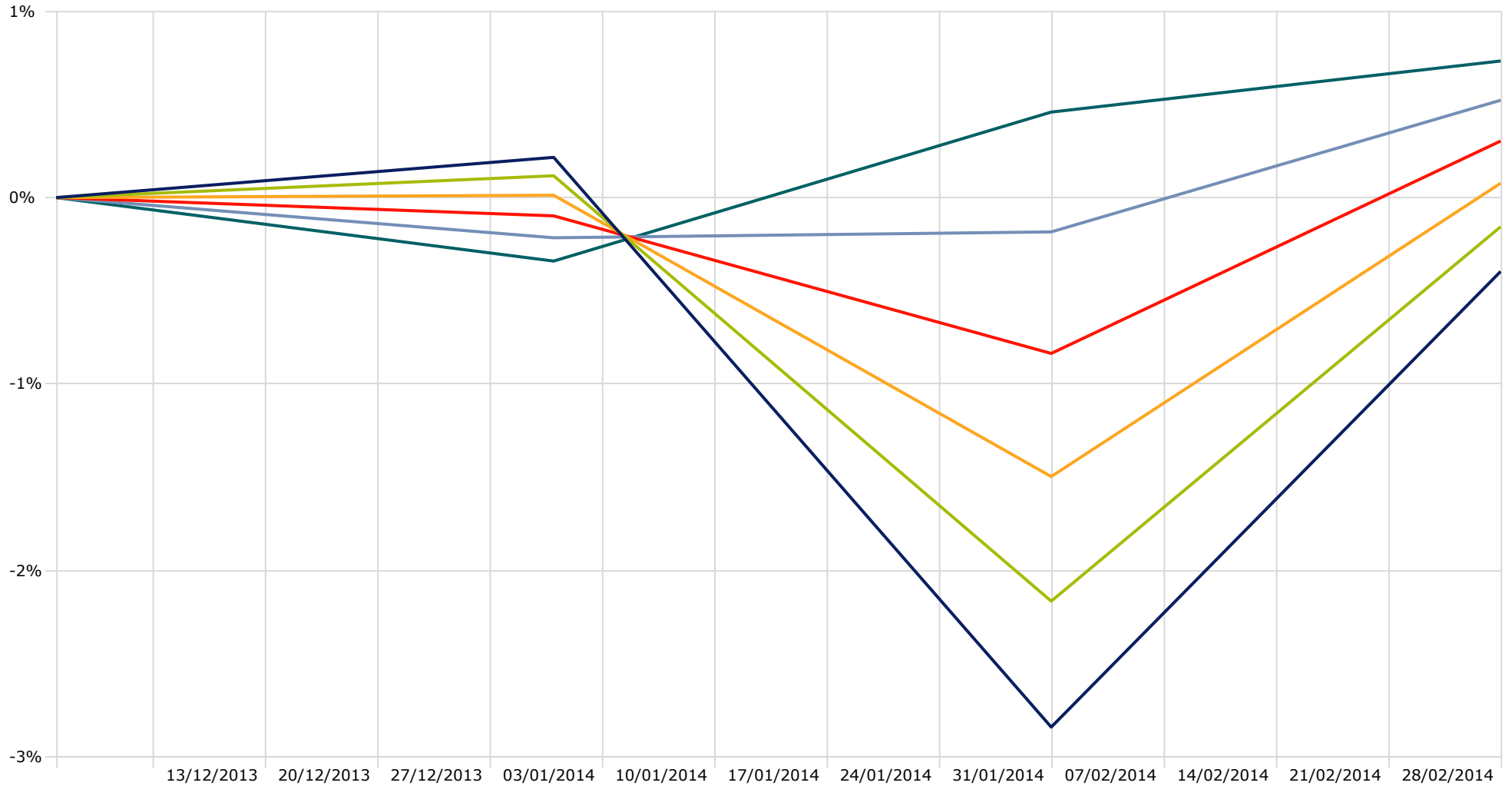
1.0%

How EBI Global Portfolios Behaved in Past Significant Virus Outbreaks



Ebola: December 2013 - February 2014

Time Period: 01/12/2013 to 28/02/2014



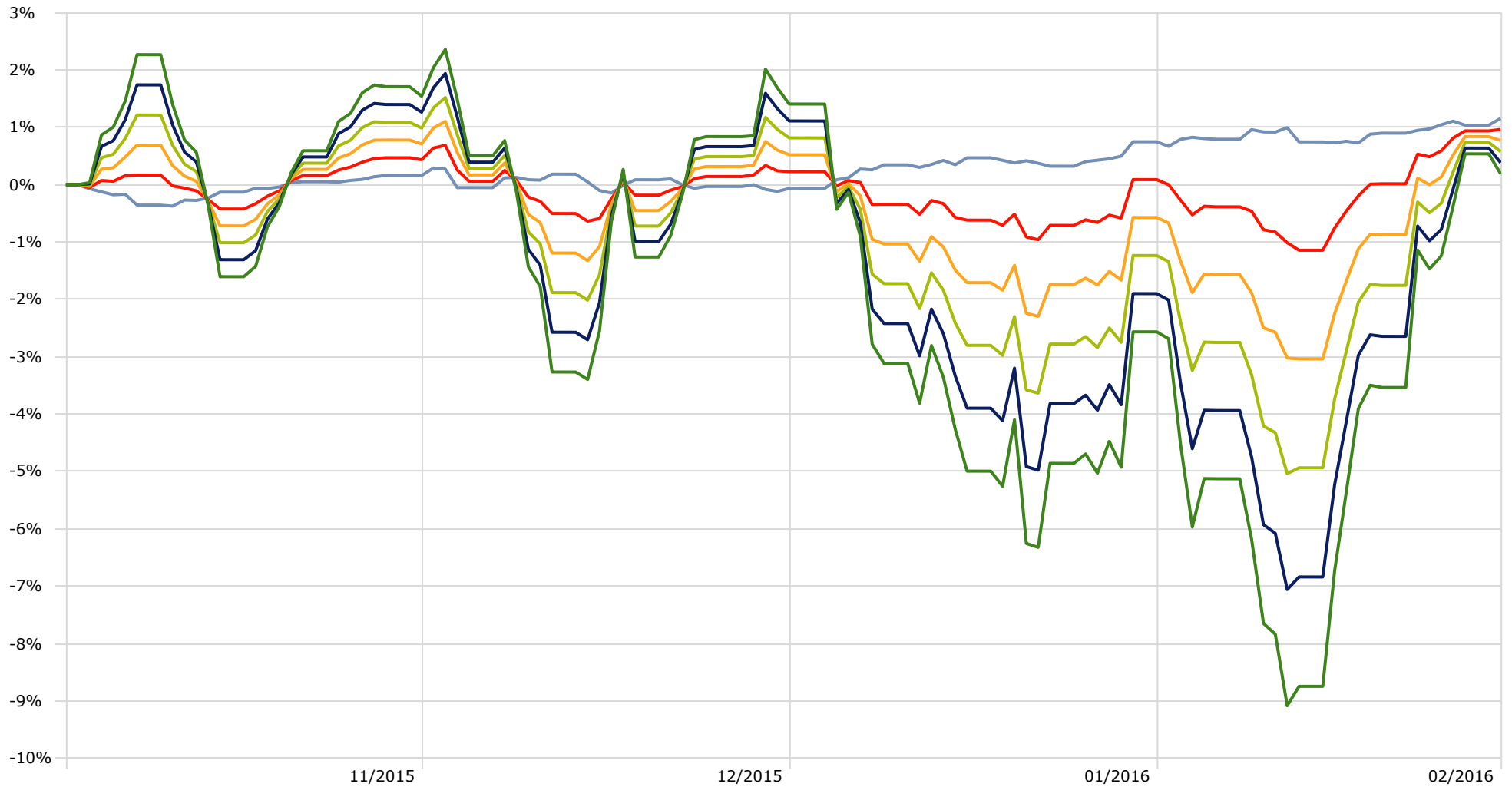
Global 100	-0.4%	Global 80	-0.2%	Global 60	0.1%
Global 40	0.3%	Global 20	0.5%	Global Bond	0.7%

How EBI Global Portfolios Behaved in Past Significant Virus Outbreaks



Zika: November 2015 - February 2016

Time Period: 01/11/2015 to 29/02/2016

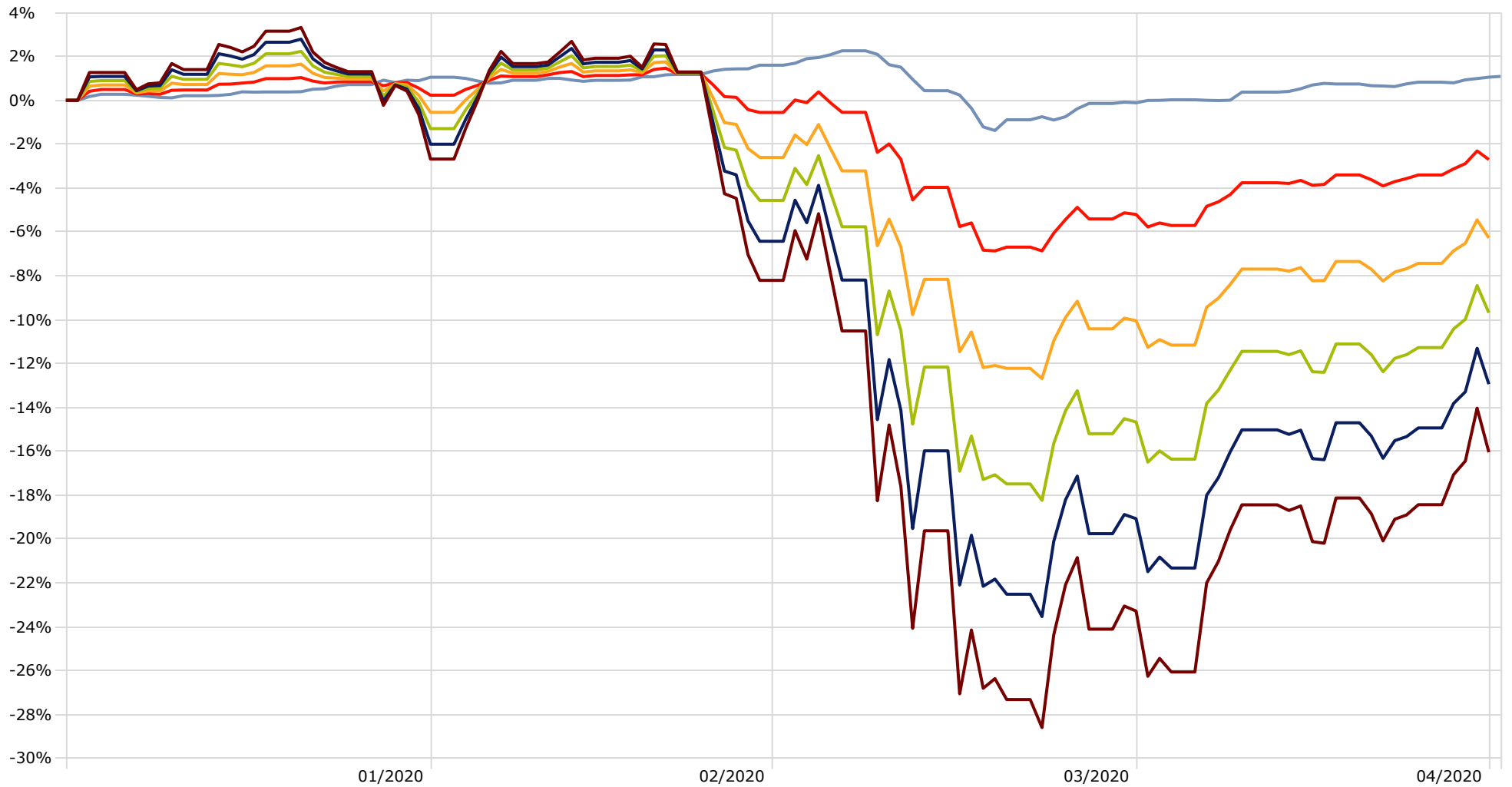


How EBI Global Portfolios Behaved in Past Significant Virus Outbreaks



Coronavirus: January 2020 -

Time Period: 01/01/2020 to 01/05/2020



Global 100	-16.0%	Global 80	-12.9%	Global 60	-9.7%
Global 40	-6.3%	Global 20	-2.7%	Global Bond	1.1%