

THANK YOU FOR WATCHING

Help Clients Make Sense Out of Risk Control Indexes

YOUR EXCLUSIVE SHOW NOTES

SUMMARY

In this conversation, Chris McDonald, from SMS, hosts Laurence Black and Branislav Nikolic, with The Indexed Standard, to discuss the evolving landscape of indices, particularly focusing on the Index Standard, the importance of forecasting over backcasting, and the rise of risk control indices. They explore the complexities and innovations in the index market, the significance of understanding future trends, and the performance of multi-asset indices in the context of annuities and investment strategies. This conversation delves into the evolution of financial products, particularly focusing on innovation in risk control indices and crediting strategies in annuities. The speakers discuss the importance of diversification in investment strategies and the need for simplicity in explaining complex financial products to advisors and clients. They also touch on market forecasts and the significance of understanding different asset classes.

TAKE AWAYS

**IT MAKES SENSE
TO BE DIVERSIFIED.**

- The performance of multi-asset indices has been mixed in recent years.
- Innovation in indices is driven by the need for unique investment products.
- Understanding the past is important, but looking forward is crucial for investment success.
- The risk control feature has shown better risk-adjusted returns than traditional benchmarks.
- Diversification remains a key strategy in investment planning.
- Market forecasts indicate higher returns in international markets compared to the US.
- Gold's performance may not sustain its recent highs in the coming years.
- Understanding the differences between FIAs and IULs is vital for effective financial planning.
- Independent analysis of indices can lead to better investment decisions.
- Educating clients about financial products enhances their investment experience.

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