

Advisory Blog

Timely insights on the issues that matter most to advisors and their clients

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Volatility

200 Years of Data Affirm Our Long-Term Confidence in the 60/40 Portfolio

By: Jitania Kandhari | April 15, 2024

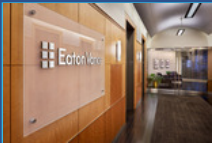
KEY POINTS

- 1. The 60/40 portfolio experienced a rollercoaster ride, down 17.5% in 2022 and up 17.2% in 2023. ¹
- 2. Whenever U.S. inflation exceeded 2.4%, there was an increase in the median correlation between stock and bond returns.
- 3. Two hundred years of historical analysis suggests there is an 80% probability of positive returns in the two years following a year of negative returns for both stocks and bonds.

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