

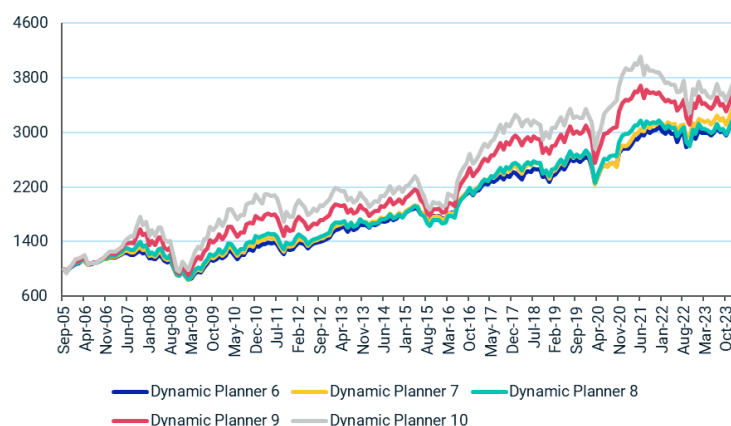
# MSCI Multi-Asset Indexes: Dynamic Planner Indexes 6-10 (GBP)

Dynamic Planner (DP) was launched in 2003 and today is one of the UK's most-widely used risk profiling and asset allocation investment processes supporting thousands of financial advisers and planners. Dynamic Planner's asset and risk model has produced a set of model portfolios at an asset class level, optimized to deliver good returns for one of ten investor risk levels from low-risk to high-risk. MSCI has developed a series of ten indexes designed to represent the risk and return characteristics of these strategies by targeting a pre-determined target risk range.

For a complete description of the index methodology, please see [Index methodology - MSCI](#)

## Cumulative index performance (GBP – Net)

SEPTEMBER 2005 – DECEMBER 2023



## Annual performance (%)

YEAR	DP 6	DP 7	DP 8	DP 9	DP 10
2023	9.50	9.64	7.06	5.89	4.37
2022	-5.88	-3.65	-6.00	-6.47	-8.34
2021	11.57	13.27	7.39	4.47	0.74
2020	4.63	2.88	7.66	10.65	14.80
2019	16.09	17.03	16.46	15.61	14.73
2018	-5.78	-7.19	-7.51	-8.12	-8.46
2017	12.56	15.20	18.51	21.23	23.86
2016	21.21	23.29	25.48	28.03	30.63
2015	0.45	-0.79	-2.38	-4.06	-7.18
2014	7.24	5.05	4.14	5.44	5.81
2013	13.01	13.29	9.48	3.84	-0.45
2012	12.61	11.92	12.33	13.98	14.08
2011	-3.42	-5.29	-7.46	-11.67	-15.71
2010	13.14	14.19	15.29	18.17	21.71

## Index performance

NET TOTAL RETURNS (%) DECEMBER 29, 2023

INDEX	1 Month	3 Months	1 Year	Year to Date	ANNUALIZED			
					3 Years	5 Years	10 Years	Since Sep 30, 2005
Dynamic Planner 6	3.89	4.97	9.50	9.50	4.76	6.91	6.82	6.55
Dynamic Planner 7	3.96	4.63	9.64	9.64	6.16	7.57	7.06	6.86
Dynamic Planner 8	3.85	4.31	7.06	7.06	2.62	6.26	6.60	6.57
Dynamic Planner 9	3.61	3.75	5.89	5.89	1.14	5.77	6.68	7.19
Dynamic Planner 10	3.45	3.57	4.37	4.37	-1.22	4.89	6.32	7.45

The MSCI Multi-Asset Indexes: Dynamic Planner module was launched on July 24, 2019. Data prior to the launch date is back-tested data (i.e. calculations of how the index might have been performed over that time period had the index existed). There are frequently material differences between back-tested performance and actual results. Past performance – whether actual or back-tested – is no indication or guarantee of future performance.

# Index risk and return characteristics

(%) DECEMBER 29, 2023

ANNUALIZED STANDARD DEVIATION

INDEX	3 Years	5 Years	10 Years	Since Sep 30, 2005
Dynamic Planner 6	8.60	10.22	9.19	10.84
Dynamic Planner 7	9.15	11.31	10.35	12.18
Dynamic Planner 8	10.16	11.81	11.16	13.28
Dynamic Planner 9	11.29	12.68	12.28	15.11
Dynamic Planner 10	12.48	13.67	13.48	17.04

## ABOUT MSCI INC.

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With over 50 years of expertise in research, data and technology, we power better investment decisions by enabling clients to understand and analyze key drivers of risk and return and confidently build more effective portfolios. We create industry-leading research-enhanced solutions that clients use to gain insight into and improve transparency across the investment process. To learn more, please visit [www.msci.com](http://www.msci.com).

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