



Returning to What Matters the Most—Robust and Sustainable Performance

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Surveying investors, our research partners at YCharts, captured an eye-catching boomerang shift in investor preferences between 2019 and 2022.

Pre-CoViD, Portfolio Performance was ranked only third, at 38% by investors with less than \$500K and 53% by investors with more than \$500K. Intangibles like ‘Understanding of Me and My Goals’ (#1) and ‘Customer Service/Communication’ (#2) topped the charts.

Then, CoViD came, followed by the challenges of 2022!

CoViD’s crash was widely misinterpreted on Wall Street as a bear market accompanying a recession instead of the treacherous whipsaw that it was. Many investors were guided to sell and lower their exposure, in the process triggering taxes, locking in losses, and missing the dramatic recovery we saw in April to December of 2020.

Skepticism and hesitation prevailed in 2021 when the market logged significant gains. Then came 2022, a correction year that disheartened many investors and punished traditional portfolios—especially those tilted conservatively and oriented towards income—with the worst bear market in the history of bonds.

Suffice it to say that performance suffered during this period and triggered a much-needed recalibration: understandably, at the end of 2022 preference has boomeranged back to performance, catapulted to #1 issue (top-choice for 74% of the <\$500K and 78% for the >\$500K investors).

At GNH Capital Group, robust and sustained performance is always our #1 focus.

Our strategies are engineered to use market adaptation, risk controls, and tax vigilance to dynamically navigate market regime shifts, aiming to produce a robust and sustainable stair-step in investor wealth. Our goal is to reduce the clients’ shortfall risk, and we are keenly aware that this entails a bi-focal objective—curtailing sustained losses but also capturing robust gains (for more info, read our [Manifesto](#)).

If robust and sustainable performance is high on your priority list, talk to us!

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Data Source: YCharts

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