

BKM Insight April/May 2024

*Financial advisors
whose mission is to
positively impact
lives*

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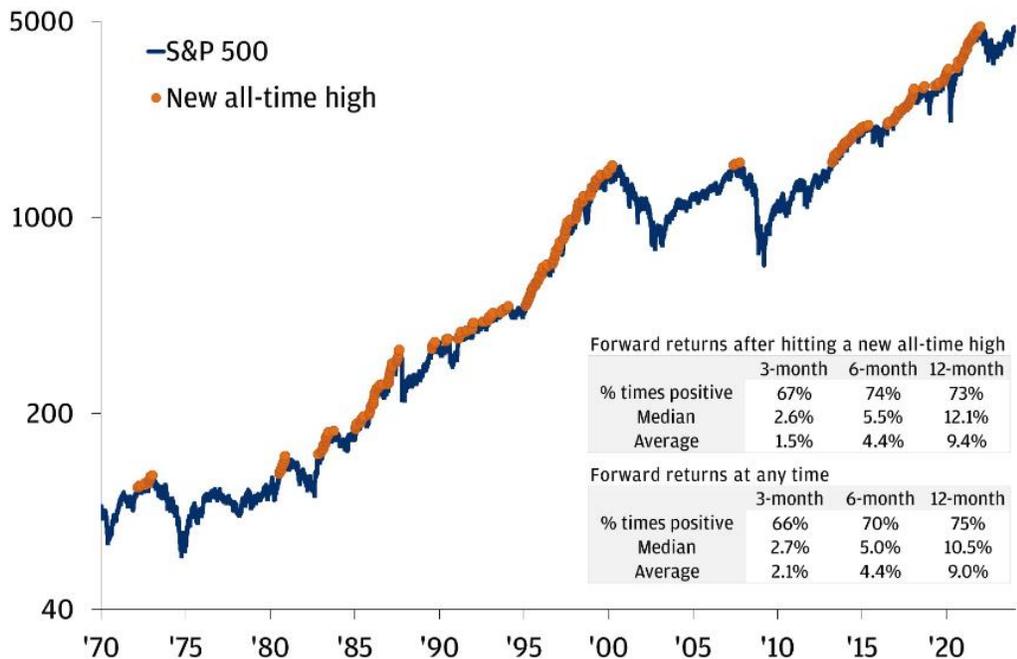


1) Investing Near All-Time Highs

Q: I'm an investor with a 10+ year time horizon. I know I want to own stocks over that timeframe. With the stock market near all-time highs, should I invest today?

A: Since 1970, 70% of the time, investing in the S&P 500 at an all-time high would have resulted in positive returns a year later with a median return of 12%. Moreover, investing at an all-time high versus not has not led to a meaningful difference in future returns.*

Stocks have historically never failed to regain a prior high
S&P 500 Index level and all-time highs, 1970 - Present



Sources: Bloomberg Finance L.P., JPM WM. Data as of December 29, 2023. Past performance is not a guarantee of future results. It is not possible to invest directly in an index.

*Source: <https://privatebank.jpmorgan.com/eur/en/insights/markets-and-investing/tmt/new-year-nerves-why-we-are-still-optimistic>