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Can we go in now?

One of the most difficult decisions of investing in volatile times is, when to invest. With the markets going up and down with Trump and Iran shouting at each other, and continually changing their minds, it has been difficult to decide when and where to invest. Thankfully, at last, the things appear to be settling down. We have a ceasefire, which Trump has today extended, indefinitely, some ships are getting through the Straits of Hormuz, and Iran has stopped bombing its neighbours. It is probably this which is the most encouraging.

With most of Iran's Navy, Airforce and missiles destroyed and the US keeping up its boycott of Iran's shipping movements, you can see that Trump has a stranglehold on Iran's oil income. He is dragging Iran to the negotiating table to get a lasting peace. We hope so!

Looking at the performance charts of the world stock markets, 27th Feb was the historical high point. The outbreak of war resulted in an average fall of around 8% in all world markets, then a slight recovery and since the 6th April the markets have all been moving sideways. We have had 16 days of smooth flatlining. With these observations in mind, maybe now would be a good time to consider to start investing in world markets.

The UK FTSE index shows this in graphic detail with the overall 6month performance at 12.66%

FTSE 100 Index

INDEXFTSE: UKX ⓘ

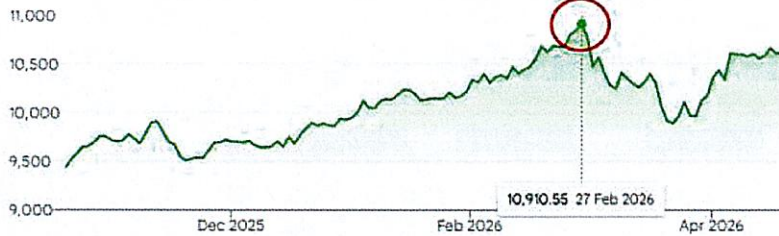
10,620.76

+1,193.77 (12.66%) ↑ past 6 months

21 Apr, 10:07 BST • Disclaimer

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1D 5D 1M 6M YTD 1Y 5Y Max



Open	10,609.37	Low	10,602.00	52-wk high	10,934.94
High	10,630.72	Prev close	10,609.08	52-wk low	8,262.49

The European STOXX 600 Index has had a similar performance over the same period, but a bigger fall at the outbreak of war and not such a good recovery. 8.72% over the past 6 months.

STOXX Europe 600

INDEXSTOXX: SXXP ⓘ

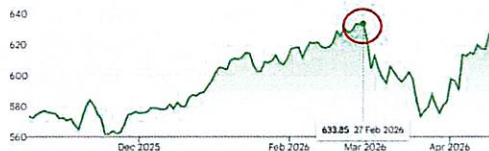
623.28

+49.98 (8.72%) ↑ past 6 months

21 Apr, 12:52 CEST • Disclaimer

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1D 5D 1M 6M YTD 1Y 5Y Max



Open	621.82	Low	621.03	52-wk high	636.16
High	623.50	Prev close	621.46	52-wk low	501.16

CAC 40

INDEXEURO: PX1 ⓘ

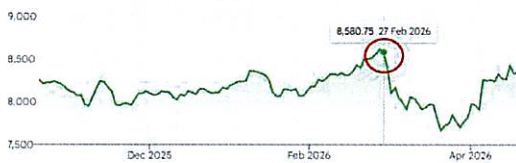
8,344.17

+85.31 (1.03%) ↑ past 6 months

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1D 5D 1M 6M YTD 1Y 5Y Max



Open	8,320.07	Low	8,311.92	52-wk high	8,642.23
High	8,345.74	Prev close	8,331.04	52-wk low	7,218.30

The French CAC40 has not had such a good time. Its recovery has not been so strong and its overall performance of the past 6 months has only been 1.03%.

The Japanese Nikkei 225 has had the best recovery and the best overall performance over the past 6 months at 20.34%. This is because the Japanese economy has a higher percentage of Tech stocks and these companies have not been affected by the war and the slowdown due to the higher oil prices.

Nikkei 225

INDEXNIKKEI: N225 ⓘ

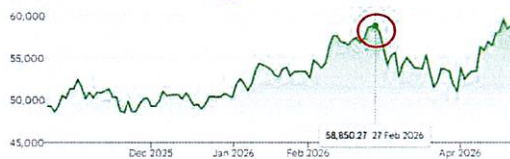
59,349.17

+10,033.11 (20.34%) ↑ past 6 months

21 Apr, 15:45 GMT+9 • Disclaimer

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1D 5D 1M 6M YTD 1Y 5Y Max



Open	59,031.51	Low	59,004.76	52-wk high	59,688.10
High	59,611.91	Prev close	58,824.89	52-wk low	34,109.85

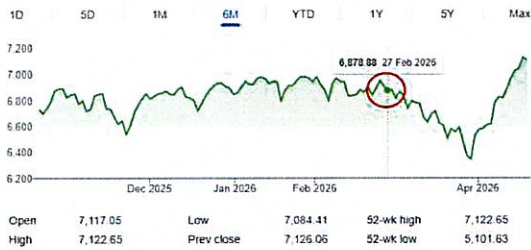
S&P 500

INDEXSP: INX

7,109.14

+373.79 (5.55%) ↑ past 6 months

20 Apr 16:39 GMT-4 • Disclaimer



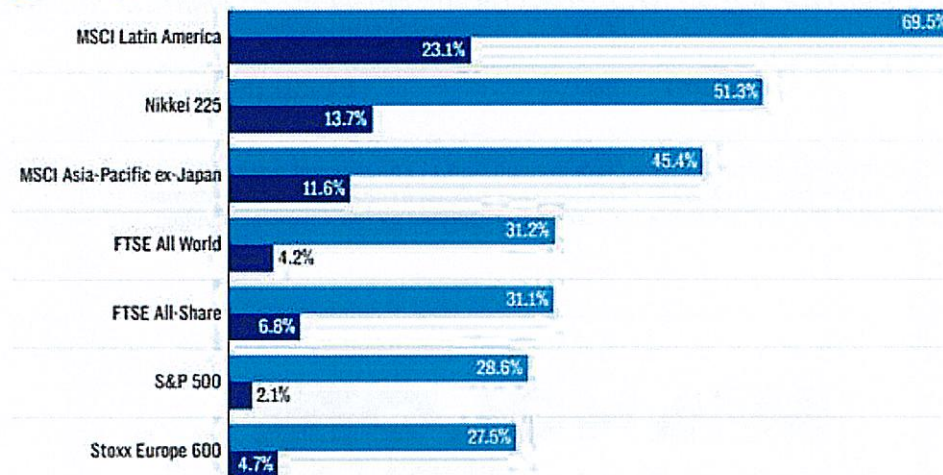
The American Standard & Poors S&P 500 has been the least affected by the Iran war with increasing rise in Tech stocks of the Magnificent 7 and the increasing development of AI creating a balance into the overall Index.

It's interesting to see that the UK equities are holding their own on the global stage, not only over the past year, but also since the beginning of this year 2026. This is mainly due to the content of the indexes and the type of companies contained within them such as commodities.

UK equities hold their own on the global stage

Total return

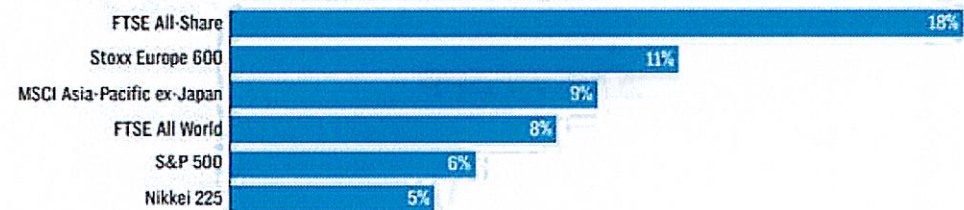
■ Past year ■ 2026 to date



Source: LSEG Refinitiv data

Latin America and the UK offer strong exposure to commodity producers

Index weighting to commodities (basic materials + energy)



Source: FTSE Russell, MSCI, Nikkei Inc, Standard & Poor's and Stoxx

As I said at the beginning, now may be a good time to consider starting to invest. If you remain concerned with the risk, then follow my previous advice and start investing on a gradual basis such as once a month until things look more settled.

Spring is definitely here and with the swifts and swallows arriving early, Summer must be just around the corner. Enjoy the sunshine.

Best regards

Ray

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