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**Moneyspider.com**

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**Emerging markets charge ahead – Russia and China lead major bounce over past six months, but watch where you put your money, warns Moneyspider.com**

**Neptune Russia & Greater Russia up 59.76 % over 3 months**

**Jupiter China bounces 48 per cent since November 08**

STEADILY rising values are highlighting the attractions of some global emerging market funds for investors with a reasonable appetite for risk, according to new data by fund analyst **Moneyspider.com** ([www.moneyspider.com](http://www.moneyspider.com)).

In the first four months of the year China's Shanghai Composite index rose by nearly 40 per cent, while Russia's RTS index enjoyed a bounce of 28 per cent and Brazil's Bovespa also gained a healthy 21 per cent. India's Sensex went up by 14 per cent.

Neptune's Russia and Greater Russia fund has had a storming three months: from February 5 to May 5, the fund leaped by an astounding 59.76 per cent (source: Moneyspider.com), signalling a major revival in the fortunes of this erstwhile struggling economy.

Jupiter China, meanwhile, has enjoyed an exceptional volte face in its fortunes over the past six months: since the dark days of last autumn, the fund jumped up by 48.65 per cent (source: Moneyspider.com).

"It is looking like this could be the time to get into emerging market funds," said **Moneyspider.com's** Tony Ahearne.

"We have already seen early overtures by the major institutional and pension fund investors - while dividend yield across major emerging markets is currently running at around 3.5 per cent.

"Investors should be looking for a solid, well diversified fund which preferably carries plenty of exposure to China, which is at the more robust end of emerging market economies.

"It looks as if China remains domestically strong, and this economy is likely to spearhead the emerging market recovery," he added.

After a difficult 2008, emerging markets began to recover back in November, hard on the heels of China's unveiling a huge stimulus package.

The \$586bn fiscal stimulus package sparked hopes that exporters in many emerging markets would benefit from increased Chinese demand.

"We also have the scenario whereby emerging markets are being favoured by institutional investors as they are not so exposed to toxic assets and dangers of nationalisation as their western counterparts," said Ahearne.

"Emerging market currencies have also been boosted by the G20's pledge to set aside billions of extra dollars for the International Monetary Fund to help prop up emerging market economies that run into trouble."

The best performing, **Moneyspider** 'A' rated emerging markets fund over the past five years is Baillie Gifford's Global Emerging Market fund, which rose by 137 per cent over the period.

A £5,000 investment into this fund at the end of April 2004 would now be worth £11,855.

The fund has also risen by more than 35 per cent in the last six months (see table).

Rival managers offering specialist funds in the global emerging market sector are also fielding strong returns over three and six month periods (see table for full illustration).

Fund Manager	3 months	6 months	1 Year	5 Years	Moneyspider Rating	Return on £5,000 over 5 years
Baillie Gifford	20.20	35.77	-23.5122	137.1102	A	£11,855.51
Aberdeen Unit Trusts & OEICs	16.17	22.41	-14.9928	134.5983	A	£11,729.92
JP Morgan Asset Management UK	13.02	21.79	-22.163	131.641	A	£11,582.05
Lazard Fund Managers	13.54	25.25	-21.7927	122.0895	A	£11,104.48
First State Investments UK Ltd	13.86	26.18	-7.5559	120.686	A	£11,034.30

Source: Moneyspider.com / Financial Express 06.05.2009

Aberdeen, JP Morgan and Lazard are all out-performing with **Moneyspider.com** 'A' rated funds.

But while the six and three month figures are startlingly good given the wider economic malaise affecting other areas of equity investment, Tony Ahearne stressed that short term performance figures are not necessarily a guide to how a fund is going to do over more traditionally accepted three and five year time frames.

"These early signs are exceptionally encouraging, and it will come as no surprise that institutional money is now finding its way to emerging market coffers," he said.

“But investors should not rush in, and the general rule of thumb is not to have any more than five per cent of your portfolio exposed to what is after all a higher risk investment strategy.”

**Moneyspider.com** has no registration fee and the service not only rates the performance of each of the client’s own funds but also shows a comparison with the top five funds in the same sectors. It also shows the top-performing funds from all sectors, so **Moneyspider.com** investors can see where the real profits have been.

“Keeping a close eye on your fund’s performance is crucial in these uncertain times - in rapidly changing market conditions, as we are currently experiencing, knowing how a specific fund in which you are invested is performing and – equally important – how other funds compare, is simply good financial common sense,” said Ahearne.

**Ends**

\* Moneyspider.com, April 2009 internal investor trend analysis

Further details on the mechanics of **Moneyspider.com** can be found at

[www.moneyspider.com](http://www.moneyspider.com)

**General enquiries:**

**Moneyspider.com**

[www.moneyspider.com](http://www.moneyspider.com) / 01784 264220

**Media enquiries:**

**Tony Ahearne, Director  
Moneyspider Limited**

**020 7630 9696**

**Editorial Consultants  
David Andrews Media Ltd**

[consultants@ davidandrewsmedia.co.uk](mailto:consultants@ davidandrewsmedia.co.uk)

**01273 737352**

**Cathy Tully, Consultant  
David Andrews Media Ltd**

**01273 737352/ 07747 196854**

[cathy@ davidandrewsmedia.co.uk](mailto:cathy@ davidandrewsmedia.co.uk)

**David Andrews, Director  
David Andrews Media Ltd**

**01273 737352 / 07941 255855**

[david@ davidandrewsmedia.co.uk](mailto:david@ davidandrewsmedia.co.uk)

### Editor's notes

Moneyspider.com was launched in April 2004 and is an independent investment research and information company for private investors. Moneyspider.com constantly monitors all 2,000 or so funds available to UK investors and provides online personal reports that are updated on a daily basis showing current valuation and performance of all funds in one place.

The Moneyspider service is provided to those investors who have or are thinking about purchasing Unit Trusts or OEICs (Open Ended Investment Companies) including stocks and shares ISAs. Moneyspider doesn't move or change the investments in any way; they remain as they are - with the same Fund Managers.

The Moneyspider Rating® provides a unique assessment of the performance of each fund measured against four key parameters:

- **Sector ranking:** a comparison with all other funds in the same sector as your fund (based on the sector definitions used by the Investment Management Association).
- **All funds ranking:** a comparison with all other 2000 or so Unit Trusts and Open Ended Investment Company funds available to UK investors.
- **FTSE 100:** a comparison of the total return of the fund with the total return of the FTSE 100 index (comprising the UK's 100 largest companies), providing a consistent benchmark for each fund.
- **Cash:** a comparison of the fund's performance with the return from an equivalent amount deposited in a 90 day non-high interest access account.

Moneyspider.com's unique computer system calculates the results, with specific weightings allocated to each of the four categories, with each one analysed and compared over 1, 3 and 5 years. Although the rating is generated from a highly complex, computer-based performance analysis, involving 34 separate computations, it produces a simple and straightforward result; scoring each of your funds from A (a very high rating) to E (a distinctly poor rating).

Behind these easy-to-understand ratings is a percentage score, which is calculated to four decimal points. Each day Moneyspider.com's system calculates this percentage score for every single one of the 2000 or so funds on our database, thus providing a comprehensive ranking for all funds. The 'Rank in Sector' for each fund on the Moneyspider Report, is based on the ranking of these percentage scores.

Through Moneyspider, investors can not only monitor their investments but they can also buy and switch funds, with 50% of all commission charges being rebated to the customer.

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