

One out of Four Investors Say They Increased Their Cash Allocations Compared to Start of 2018

Last month's [Asset Allocation Survey](#) special question asked AAI members how their current allocation compared to what they expected it would be when 2018 started. Just under 37% describe their allocations as being more conservative than expected, with approximately one out of four respondents say they increased their cash allocations. Conversely, one-third (33%) of respondents said their portfolio allocations were either close to their expectations or were otherwise unchanged. About 9% of respondents increased their exposure to stocks, while 5% reduced their cash or bond allocations. A few respondents noted that their portfolios had declined in value. Not all respondents who took last month's asset allocation survey responded to the special question.

Here is a sampling of the responses:

- "I expected to have more in stock index funds but instead kept a major portion in cash."
- "The allocation percentage is the same, but the value is lower than I expected."
- "It is more conservative than I anticipated it being. I decreased my equity exposure because of the increased market risk."
- "More stocks now due to the pullback."
- "It's about what I thought it would be."

Want to weigh in? Take the survey yourself and see results online at

www.aaii.com/assetallocationsurvey

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