

Sun, Sand, and Suspicious Stock Picks: one in six DIY investors are picking their portfolios at the poolside

According to brand new research from digital investment platform Charles Stanley Direct, the UK's DIY investors - self directed investors who actively manage their own portfolios - have a penchant for trading by the pool.

When asked about their holiday habits:

- One in six DIY investors (16%) have traded at the poolside on holiday - rising to 20% of men compared to 11% of women
- 18% have managed their portfolio on holiday days out with the family - rising to 24% of Gen Zs
- 13% have managed their portfolio at the airport
- And the same number (13%) have spoken with their financial advisor while on holiday
- More than a quarter (27%) have ensured the accommodation they stayed at had internet specifically to allow them to manage their portfolio

Some do disengage!

- More than one in five DIY investors (22%) disengage from market news for the length of their holiday
- and 21% put a pause on managing their portfolio for the duration of their trip

Rob Morgan, Chief Investment Analyst at Charles Stanley Direct, comments: "Britain's DIY investors are switching armchairs for deckchairs, and taking their portfolios to the pool. These sun tan traders must be applauded for their commitment - but there is also merit to switching off, especially if investors are in it for the long-run. There's no need to literally float on the stock market - unless the financial world shakes, swapping portfolio tracking for a piña colada won't do you any harm. Just remember - all financial decisions should be made sober!."

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Methodology

The research was carried out for Charles Stanley by Censuswide, among a sample of 1007 DIY Investors in the UK ('Self-Directed'), defined as; investors who actively choose their own investments, making their own asset allocation decisions, aged 18+. Survey conducted between 05/07/24 and 10/07/24.

Generational divides are as follows: Gen Z (18-26), Millennial/ Gen Y (27-42), Gen X (43-58), Baby Boomers (59-77), Silent Generation (78+). Responses were not high enough in the Silent Gen to be statistically significant.