

Benchmark Index Returns

Various indices are generally accepted in the investment community as a reasonable indication of the performance of a specific asset class or investment market, and are commonly used as a benchmark against which to measure the performance of your own portfolio. The table below presents a selection of indices covering major asset classes, sectors and international markets.

August 31, 2023

Canadian Dollar (\$US/\$CA) 73.90

Name	1M	3M	YTD	1Y	2Y	3Y	4Y	5Y	10Y	15Y	20Y	25Y
Canada												
Fixed Income												
91-Day T-Bills	0.41%	1.14%	2.96%	4.23%	2.43%	1.66%	1.58%	1.60%	1.18%	-	-	-
FTSE TMX Short-Term Bond	0.37%	-0.06%	1.29%	1.90%	-1.83%	-1.05%	0.28%	1.12%	1.42%	-	-	-
FTSE TMX Universe Bond	-0.18%	-1.25%	1.19%	0.76%	-5.44%	-4.20%	-1.78%	0.39%	1.97%	-	-	-
FTSE TMX High Yield Bond	0.37%	1.69%	3.99%	5.07%	-0.72%	3.08%	3.23%	3.56%	4.84%	-	-	-
Equities												
S&P/TSX Composite	-1.37%	4.57%	6.94%	8.49%	2.38%	10.36%	8.69%	7.80%	8.05%	5.76%	8.08%	8.07%
S&P/TSX SmallCap	-1.31%	5.31%	4.36%	5.11%	-1.30%	10.29%	7.33%	4.69%	4.78%	3.45%	4.33%	-
S&P/TSX Composite Dividend	-1.45%	4.16%	4.93%	6.02%	5.75%	12.63%	9.24%	8.13%	8.65%	-	-	-
S&P/TSX Equity Income	-1.63%	1.53%	2.93%	1.81%	6.04%	15.76%	9.14%	8.13%	6.96%	6.86%	-	-
S&P/TSX Preferred Share	-4.21%	-1.58%	-2.68%	-12.31%	-9.60%	0.75%	2.05%	-1.28%	0.63%	2.06%	1.88%	-
S&P/TSX Sectors												
Cdn. Energy	7.27%	22.29%	11.36%	15.18%	52.61%	54.62%	25.16%	9.91%	3.53%	0.37%	6.32%	-
Cdn. Materials	-3.73%	3.20%	3.05%	15.17%	4.64%	0.68%	7.23%	10.29%	4.93%	1.20%	6.19%	7.10%
Cdn. Industrials	-1.23%	4.19%	8.28%	11.11%	5.80%	12.78%	11.71%	10.34%	13.34%	10.84%	11.02%	9.89%
Cdn. Consumer Discretionary	-5.07%	4.41%	6.58%	9.92%	1.86%	13.99%	8.36%	6.75%	10.30%	9.73%	8.53%	7.87%
Cdn. Consumer Staples	1.47%	-0.07%	1.66%	7.05%	7.03%	11.45%	7.83%	11.03%	12.81%	13.03%	10.17%	12.34%
Cdn. Health Care	3.22%	23.65%	28.48%	6.25%	-37.64%	-20.42%	-26.43%	-26.00%	-10.31%	-0.77%	-3.27%	-0.81%
Cdn. Financials	-4.26%	3.64%	3.14%	4.00%	0.59%	12.83%	8.73%	6.90%	9.51%	8.63%	9.45%	-
Cdn. Information Technology	0.59%	4.66%	42.84%	49.96%	-9.51%	4.85%	14.45%	19.37%	20.14%	12.99%	11.63%	-
Cdn. Telecommunication Services	-1.57%	-5.19%	-5.51%	-2.61%	-2.79%	6.72%	3.70%	4.91%	9.09%	8.90%	10.01%	8.44%
Cdn. Utilities	-4.49%	-7.70%	-0.67%	-16.67%	-4.66%	3.66%	4.75%	8.92%	8.34%	6.37%	8.14%	8.88%
Cdn. Real Estate	-1.04%	1.46%	3.61%	1.47%	-7.27%	7.27%	0.42%	2.86%	8.04%	7.64%	9.13%	9.21%
Global Gold	-4.04%	-5.98%	0.30%	25.87%	-0.47%	-8.45%	3.03%	13.77%	4.68%	1.06%	2.65%	-
Global Mining	-4.60%	3.36%	0.29%	22.90%	5.70%	6.56%	12.73%	14.57%	7.55%	2.79%	-	-
S&P/TSX Cdn. REIT	-3.02%	-1.17%	-0.22%	-0.01%	-6.71%	7.51%	-0.23%	2.88%	6.25%	7.09%	8.34%	10.77%
U.S.												
S&P 500 (LargeCap)	1.06%	7.71%	18.62%	19.66%	5.07%	11.89%	13.77%	11.92%	15.65%	12.75%	9.80%	7.75%
Russell 2000	-2.44%	8.43%	8.85%	8.01%	-4.00%	9.46%	8.07%	3.88%	10.68%	9.72%	8.23%	7.94%
Russell 2000 Growth	-2.65%	6.89%	12.57%	10.20%	-7.48%	3.94%	6.61%	3.20%	10.90%	10.21%	8.38%	7.21%
Russell 2000 Value	-2.25%	9.92%	4.84%	5.45%	-0.79%	14.95%	8.74%	3.92%	10.06%	8.94%	7.83%	8.16%
International & Other												
London FTSE 100 (UK)	-1.35%	2.97%	8.25%	19.32%	5.56%	11.11%	6.05%	4.17%	5.97%	4.97%	5.56%	3.26%
Frankfurt DAX 30 (Germany)	-2.03%	3.10%	16.18%	38.23%	-0.36%	5.09%	7.61%	4.56%	7.57%	5.82%	7.71%	4.14%
S&P/ASX 50 (Australia)	-1.87%	3.59%	1.63%	7.86%	1.44%	8.05%	5.77%	5.86%	6.89%	6.76%	8.73%	8.74%
MSCI World (Net)	0.24%	6.43%	16.00%	19.31%	2.61%	9.75%	10.93%	9.11%	12.03%	9.28%	8.07%	6.00%
MSCI World ex-USA	-1.26%	3.48%	10.84%	20.87%	1.42%	8.16%	7.22%	5.61%	8.09%	5.96%	6.72%	4.84%
MSCI Europe	-1.37%	3.23%	12.97%	27.27%	2.19%	9.47%	8.06%	6.27%	8.25%	6.03%	6.93%	4.57%
MSCI Japan	0.21%	4.11%	13.73%	19.48%	0.49%	5.55%	6.28%	4.24%	8.47%	5.94%	5.14%	3.90%
MSCI EAFE (Net)	-1.24%	3.25%	10.76%	21.70%	0.71%	7.37%	6.54%	4.89%	7.57%	5.50%	6.12%	4.19%
MSCI EM (Emerging Markets)	-3.60%	3.11%	4.76%	4.95%	-7.46%	0.22%	3.20%	2.09%	5.97%	4.65%	7.73%	7.99%
EM Latin America	-4.72%	8.81%	15.93%	22.77%	9.18%	15.92%	4.03%	5.44%	4.24%	2.02%	8.92%	8.66%
EMU (European Monetary Union)	-2.01%	3.93%	16.46%	35.01%	0.99%	9.05%	7.87%	5.69%	8.69%	5.23%	6.62%	4.32%
ACWI ex-USA	-1.92%	3.38%	9.11%	16.10%	-1.21%	5.79%	6.02%	4.58%	7.51%	5.57%	6.70%	5.02%

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