

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.

December 29, 2023

Canadian Dollar (\$US/\$CA) 75.61	2.69%	2.23%	0.11%	2.41%	-2.09%	-1.26%	-0.45%	0.62%	-2.16%	-0.51%	-0.12%	0.59%
Name	1M	3M	6M	1Y	2Y	3Y	4Y	5Y	10Y	15Y	20Y	25Y
Canada												
Fixed Income												
91 Day T Bills	0.39%	1.28%	2.52%	4.71%	3.25%	2.22%	1.88%	1.83%	1.31%	-	-	-
FTSE TMX Short Term	1.51%	4.11%	3.98%	5.02%	0.39%	-0.06%	1.26%	1.62%	1.68%	-	-	-
FTSE TMX Universe Bond	3.43%	8.27%	4.08%	6.69%	-2.93%	-2.80%	-0.05%	1.30%	2.42%	-	-	-
FTSE High Yield Bond	3.16%	6.11%	7.24%	10.00%	1.99%	3.37%	4.19%	5.03%	5.17%	-	-	-
Equities												
S&P/TSX Composite	3.91%	8.10%	5.72%	11.75%	2.58%	9.59%	8.58%	11.30%	7.62%	9.03%	7.79%	7.54%
S&P/TSX SmallCap	3.76%	5.98%	5.14%	4.79%	-2.50%	4.57%	6.58%	8.37%	3.95%	7.21%	3.67%	-
S&P/TSX Composite Dividend	3.96%	7.32%	5.56%	9.63%	4.65%	11.87%	9.07%	11.49%	8.13%	-	-	-
S&P/TSX Equity Income	3.95%	7.32%	3.67%	6.97%	3.76%	13.58%	7.93%	11.29%	6.60%	10.08%	-	-
S&P/TSX Preferred Share	0.82%	7.28%	5.74%	5.90%	-6.86%	1.17%	2.39%	2.61%	1.46%	3.68%	2.13%	-
S&P/TSX Capped Cdn. Sector ETF Indices (\$CA)												
Cdn. Energy	-5.05%	-9.05%	9.61%	4.14%	26.65%	43.75%	18.04%	16.33%	2.17%	4.00%	5.33%	-
Cdn. Materials	1.41%	1.89%	-1.94%	-1.35%	0.18%	1.46%	6.08%	9.42%	5.22%	3.21%	4.98%	6.03%
Cdn. Industrials	6.53%	7.46%	2.93%	12.10%	6.59%	10.02%	11.64%	14.47%	11.48%	13.85%	10.78%	9.51%
Cdn. Consumer Discretionary	2.71%	6.87%	-0.44%	10.81%	2.12%	7.63%	10.26%	11.33%	9.52%	11.76%	8.34%	7.50%
Cdn. Consumer Staples	3.35%	6.28%	4.12%	6.94%	8.24%	12.80%	10.50%	11.00%	12.83%	13.37%	9.98%	11.68%
Cdn. Health Care	13.09%	4.95%	23.10%	25.82%	-26.47%	-25.36%	-24.17%	-21.63%	-10.95%	1.02%	-2.93%	-1.97%
Cdn. Financials	7.78%	12.74%	9.79%	13.86%	1.58%	12.09%	9.38%	11.68%	9.25%	12.00%	9.49%	-
Cdn. Information Technology	3.88%	18.78%	11.53%	56.51%	0.47%	5.62%	16.28%	24.21%	20.43%	18.03%	11.67%	-
Cdn. Telecommunication Services	2.91%	9.35%	-3.82%	-2.58%	-1.55%	6.42%	3.60%	5.24%	8.37%	10.35%	9.85%	7.87%
Cdn. Utilities	5.37%	8.18%	-4.76%	0.19%	-5.34%	0.01%	3.63%	9.66%	7.87%	8.02%	7.84%	8.27%
Cdn. Real Estate	8.81%	10.68%	3.98%	6.92%	-8.41%	4.86%	1.07%	5.05%	7.35%	11.70%	8.32%	8.78%
Global Gold	-1.69%	13.12%	3.08%	4.58%	1.03%	-1.14%	4.22%	10.76%	7.63%	0.65%	2.25%	-
Global Mining	3.82%	10.28%	8.22%	7.49%	8.91%	8.24%	12.66%	15.11%	7.95%	6.53%	-	-
S&P/TSX Cdn. REIT	8.87%	9.20%	1.90%	2.62%	-7.72%	4.79%	0.00%	4.19%	5.91%	10.62%	8.06%	10.28%
U.S.												
S&P 500 (LargeCap)	1.81%	9.25%	7.92%	23.31%	3.87%	11.40%	12.55%	14.97%	14.50%	14.55%	9.82%	6.93%
Russell 2000	9.28%	11.54%	8.07%	14.18%	-1.48%	3.53%	6.88%	9.29%	9.52%	11.87%	8.23%	7.28%
Russell 2000 Growth	9.04%	10.29%	4.39%	15.86%	-4.52%	-2.27%	5.35%	8.55%	9.52%	12.65%	8.40%	6.13%
Russell 2000 Value	9.50%	12.74%	11.73%	11.95%	1.13%	9.32%	7.59%	9.32%	9.11%	10.83%	7.80%	7.95%
International & Other												
London FTSE 100 (UK)	1.83%	4.46%	4.68%	11.41%	5.31%	9.05%	3.77%	6.12%	4.85%	7.36%	5.00%	3.01%
Frankfurt DAX 30 (Germany)	1.93%	11.30%	4.97%	21.55%	3.40%	4.66%	6.12%	8.23%	5.76%	7.54%	6.89%	4.09%
S&P/ASX 50 (Australia)	7.53%	12.54%	10.78%	11.09%	6.31%	7.46%	6.98%	9.12%	7.11%	9.88%	8.48%	8.39%
MSCI World (Net)	2.16%	8.98%	7.44%	20.87%	2.82%	8.64%	9.86%	12.11%	11.00%	11.27%	7.91%	5.40%
MSCI World ex-USA	2.73%	8.16%	6.01%	15.80%	3.26%	6.31%	6.22%	8.34%	7.15%	8.06%	6.32%	4.48%
MSCI Europe	2.26%	8.68%	5.54%	17.82%	3.73%	7.81%	6.80%	9.07%	7.05%	8.32%	6.43%	4.31%
MSCI Japan	1.65%	5.86%	6.54%	17.93%	2.69%	2.32%	4.81%	6.65%	7.66%	6.70%	4.97%	3.29%
MSCI EAFE (Net)	2.56%	8.01%	5.77%	15.45%	2.73%	5.34%	5.43%	7.49%	6.58%	7.48%	5.71%	3.83%
MSCI EM (Emerging Markets)	1.22%	5.58%	4.81%	7.67%	-3.91%	-3.49%	1.13%	3.43%	5.32%	7.48%	7.32%	7.25%
EM Latin America	5.55%	15.19%	12.18%	30.40%	23.52%	11.91%	4.40%	5.93%	4.77%	6.25%	8.61%	8.57%
EMU (European Monetary Union)	1.78%	10.05%	4.34%	20.94%	3.43%	6.77%	6.67%	8.89%	7.10%	7.43%	6.07%	3.96%
ACWI ex-USA	2.30%	7.42%	5.67%	13.47%	1.17%	3.34%	4.71%	6.93%	6.62%	7.79%	6.32%	4.61%

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