

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.

July 31, 2023

Canadian Dollar (\$US/\$CA) 75.89	0.48%	3.04%	2.79%	-2.68%	-2.75%	0.57%	-0.06%	-0.24%	-2.45%	-1.66%	0.33%	0.55%
Name	1M	3M	YTD	1Y	2Y	3Y	4Y	5Y	10Y	15Y	20Y	25Y
Canada												
Fixed Income												
91-Day T-Bills	0.40%	1.08%	2.55%	4.01%	2.23%	1.53%	1.52%	1.54%	1.14%	-	-	-
FTSE TMX Short Term Bond	-0.09%	-1.33%	0.91%	0.06%	-1.98%	-1.14%	0.35%	1.11%	1.38%	-	-	-
FTSE TMX Universe Bond	-1.11%	-2.74%	1.37%	-1.83%	-5.41%	-4.50%	-1.28%	0.57%	1.92%	-	-	-
FTSE TMX High Yield Bond	1.01%	1.11%	3.61%	4.73%	-0.72%	3.66%	3.20%	3.59%	4.84%	-	-	-
Equities												
S&P/TSX Composite	2.58%	0.78%	8.43%	8.23%	3.93%	11.73%	9.18%	7.92%	8.37%	5.96%	8.35%	7.16%
S&P/TSX SmallCap	6.09%	2.38%	5.74%	3.77%	-0.52%	12.27%	7.28%	4.87%	5.14%	3.62%	4.61%	-
S&P/TSX Composite Dividend	2.52%	-0.29%	6.47%	6.01%	7.19%	14.18%	9.69%	8.23%	8.93%	-	-	-
S&P/TSX Equity Income	1.40%	-2.53%	4.63%	1.35%	7.31%	18.20%	9.62%	8.39%	7.20%	7.33%	-	-
S&P/TSX Preferred Share	1.45%	-0.92%	1.60%	-7.42%	-7.15%	3.73%	2.11%	-0.27%	0.95%	2.52%	2.14%	-
S&P/TSX Sectors												
Cdn. Energy	9.26%	4.24%	3.80%	8.14%	46.26%	54.14%	21.11%	7.37%	3.01%	0.29%	6.20%	-
Cdn. Materials	6.40%	-4.04%	7.05%	19.51%	5.15%	1.72%	9.80%	9.26%	6.19%	0.97%	6.88%	6.20%
Cdn. Industrials	0.67%	2.17%	9.64%	11.20%	8.29%	14.82%	11.77%	10.78%	13.19%	11.14%	11.23%	9.13%
Cdn. Consumer Discretionary	0.87%	5.79%	12.27%	17.50%	3.92%	17.05%	9.86%	7.11%	10.98%	10.69%	8.97%	7.44%
Cdn. Consumer Staples	-2.46%	-7.35%	0.19%	4.14%	7.37%	9.53%	8.65%	10.19%	12.15%	13.30%	10.04%	11.67%
Cdn. Health Care	21.78%	14.66%	24.47%	12.37%	-38.20%	-23.13%	-29.44%	-22.52%	-10.34%	-0.95%	-3.39%	-2.12%
Cdn. Financials	3.88%	2.64%	7.72%	6.33%	3.75%	17.04%	9.21%	8.09%	10.16%	9.03%	9.81%	-
Cdn. Information Technology	1.19%	13.48%	42.00%	38.37%	-5.86%	4.15%	15.86%	20.41%	20.61%	13.07%	12.18%	-
Cdn. Telecommunication Services	-5.21%	-11.59%	-4.00%	-2.89%	-0.50%	7.76%	4.31%	5.26%	9.34%	9.54%	10.11%	7.83%
Cdn. Utilities	-1.13%	-4.87%	4.00%	-11.68%	-1.94%	4.70%	7.20%	9.91%	8.07%	6.67%	8.40%	8.63%
Cdn. Real Estate	1.82%	-2.18%	4.70%	-2.06%	-5.86%	7.69%	1.44%	3.57%	7.79%	7.98%	9.34%	8.52%
Global Gold	3.03%	-9.54%	4.53%	23.51%	-1.31%	-8.32%	8.10%	11.46%	6.05%	0.66%	3.53%	-
Global Mining	5.85%	-0.50%	5.13%	27.22%	5.13%	8.04%	14.26%	13.12%	8.73%	2.75%	-	-
S&P/TSX Cdn. REIT	2.17%	-2.10%	2.89%	-1.85%	-4.74%	7.97%	1.55%	4.04%	6.25%	7.65%	8.63%	9.88%
U.S.												
S&P 500 (LargeCap)	2.72%	7.25%	17.37%	16.13%	6.75%	13.07%	13.34%	12.47%	15.48%	13.05%	9.76%	7.20%
Russell 2000	5.61%	10.33%	11.58%	10.88%	-1.11%	11.38%	7.67%	5.35%	10.88%	10.42%	8.53%	7.29%
Russell 2000 Growth	4.18%	10.03%	15.64%	14.65%	-4.80%	5.91%	6.45%	5.08%	11.26%	10.85%	8.72%	6.37%
Russell 2000 Value	7.04%	10.45%	7.25%	6.81%	2.31%	16.79%	8.10%	4.94%	10.10%	9.70%	8.07%	7.70%
International & Other												
London FTSE 100 (UK)	3.10%	-2.04%	9.73%	17.04%	7.44%	11.87%	5.52%	3.60%	6.32%	5.05%	5.48%	3.15%
Frankfurt DAX 30 (Germany)	2.42%	0.15%	18.60%	35.45%	1.99%	6.99%	7.59%	4.14%	7.78%	5.73%	7.60%	3.61%
S&P/ASX 50 (Australia)	3.27%	0.63%	3.57%	11.43%	3.76%	9.45%	5.42%	5.87%	7.55%	6.79%	8.84%	8.32%
MSCI World (Net)	2.87%	5.31%	15.73%	16.61%	4.40%	11.03%	10.60%	9.39%	12.04%	9.41%	8.08%	5.55%
MSCI World ex-USA	2.76%	0.55%	12.26%	19.33%	3.53%	9.45%	7.19%	5.54%	8.37%	6.02%	6.84%	4.49%
MSCI Europe	2.59%	-1.09%	14.53%	23.72%	4.31%	10.45%	8.05%	6.03%	8.54%	6.09%	6.91%	4.23%
MSCI Japan	2.53%	6.04%	13.49%	18.79%	2.55%	7.10%	6.25%	4.30%	8.49%	5.89%	5.58%	3.55%
MSCI EAFE (Net)	2.75%	0.32%	12.15%	20.01%	2.86%	8.63%	6.47%	4.80%	7.84%	5.55%	6.23%	3.86%
MSCI EM (Emerging Markets)	5.79%	5.40%	8.68%	11.82%	-3.92%	1.27%	3.15%	2.35%	6.45%	4.58%	8.19%	6.85%
EM Latin America	4.67%	13.58%	21.68%	35.45%	13.02%	14.27%	3.38%	4.69%	4.68%	2.01%	9.32%	7.20%
EMU (European Monetary Union)	2.53%	0.43%	18.85%	31.94%	3.67%	10.47%	8.09%	5.49%	9.00%	5.30%	6.64%	3.93%
ACWI ex-USA	3.60%	1.87%	11.26%	17.17%	1.33%	6.99%	6.00%	4.61%	7.84%	5.62%	6.87%	4.63%

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