

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.

June 30, 2023

Canadian Dollar (\$US/\$CA) 75.53	2.75%	2.22%	2.30%	-2.67%	-3.24%	0.97%	-0.29%	-0.11%	-2.28%	-1.73%	0.12%	0.42%
Name	1M	3M	YTD	1Y	2Y	3Y	4Y	5Y	10Y	15Y	20Y	25Y
Canada												
Fixed Income												
91-Day T-Bill	0.34%	1.01%	2.14%	3.70%	2.04%	1.40%	1.45%	1.48%	1.11%	-	-	-
FTSE_TMX Short Term Bond	-0.34%	-0.80%	1.00%	1.37%	-1.76%	-0.95%	0.38%	1.11%	1.42%	-	-	-
FTSE_TMX Universe Bond	0.04%	-0.69%	2.51%	3.15%	-4.40%	-3.75%	-0.96%	0.65%	2.06%	-	-	-
FTSE_TMX High Yield Bond	0.30%	0.70%	2.57%	5.43%	-0.91%	3.91%	3.24%	3.44%	4.82%	-	-	-
Equities												
S&P/TSX Composite	1.08%	-1.13%	3.37%	8.00%	1.89%	11.59%	7.98%	7.14%	8.19%	5.20%	8.30%	6.70%
S&P/TSX SmallCap	-2.04%	-7.11%	-2.93%	2.59%	-5.97%	11.72%	5.82%	2.87%	4.65%	2.46%	4.60%	-
S&P/TSX Composite Dividend	0.88%	-1.81%	1.63%	5.66%	5.23%	13.94%	8.48%	7.57%	8.75%	-	-	-
S&P/TSX Equity Income	-0.30%	-2.20%	1.07%	0.39%	4.98%	17.67%	8.68%	7.98%	7.15%	6.87%	-	-
S&P/TSX Preferred Share	0.86%	-2.48%	-0.26%	-9.36%	-7.64%	5.24%	1.97%	-0.41%	0.66%	2.24%	2.05%	-
S&P/TSX Sectors												
Cdn. Energy	1.40%	-3.59%	-7.67%	0.12%	29.96%	47.22%	16.42%	5.09%	2.26%	-1.50%	5.51%	-
Cdn. Materials	-1.37%	-8.87%	-1.51%	9.24%	2.34%	3.09%	8.16%	6.58%	5.46%	-0.45%	6.85%	5.48%
Cdn. Industrials	2.82%	0.18%	6.87%	19.59%	8.43%	15.78%	11.51%	11.14%	13.01%	11.08%	11.61%	8.64%
Cdn. Consumer Discretionary	5.85%	3.23%	8.06%	22.50%	1.55%	17.20%	9.76%	6.24%	10.97%	10.32%	9.02%	7.15%
Cdn. Consumer Staples	-1.73%	-5.93%	-0.03%	9.55%	10.66%	11.41%	9.24%	10.25%	12.89%	12.89%	10.13%	11.66%
Cdn. Health Care	-5.22%	-2.79%	-1.52%	-17.71%	-48.31%	-28.54%	-35.76%	-27.44%	-12.07%	-2.10%	-4.32%	-3.36%
Cdn. Financials	2.21%	0.05%	1.72%	3.84%	1.00%	15.14%	7.95%	7.41%	10.03%	8.86%	9.66%	-
Cdn. Information Technology	-0.17%	10.15%	36.25%	45.75%	-6.43%	4.92%	15.46%	18.94%	20.38%	12.68%	12.47%	-
Cdn. Telecommunication Services	-0.59%	-3.72%	-0.92%	-1.19%	0.89%	9.70%	4.78%	9.61%	9.45%	10.48%	10.48%	7.68%
Cdn. Utilities	-3.81%	-3.02%	3.52%	-8.60%	-0.73%	6.61%	7.56%	10.03%	8.21%	6.59%	8.60%	8.26%
Cdn. Real Estate	-2.30%	-5.73%	-0.22%	-0.07%	-5.99%	7.10%	0.76%	2.96%	7.12%	7.73%	9.50%	8.24%
Global Gold	-6.70%	-10.69%	-0.47%	7.05%	-1.38%	-5.52%	7.51%	9.23%	6.27%	-0.50%	3.57%	-
Global Mining	1.66%	-7.69%	-1.36%	16.39%	4.25%	9.52%	11.73%	11.35%	8.64%	1.31%	-	-
S&P/TSX Cdn. REIT	-3.32%	-6.44%	-2.38%	-1.38%	-5.09%	6.49%	0.61%	3.21%	5.39%	7.18%	8.55%	9.49%
U.S.												
S&P 500 (LargeCap)	2.06%	4.64%	12.40%	20.87%	5.98%	12.88%	12.65%	12.06%	15.31%	12.71%	9.83%	7.08%
Russell 2000	3.02%	0.75%	3.42%	12.95%	-6.28%	8.98%	5.92%	3.88%	10.55%	10.18%	8.65%	6.71%
Russell 2000 Growth	2.81%	2.16%	8.28%	18.80%	-9.32%	4.22%	5.09%	3.82%	11.10%	10.59%	8.96%	5.83%
Russell 2000 Value	3.19%	-0.85%	-1.58%	6.98%	-3.50%	13.64%	5.97%	3.28%	9.60%	9.49%	8.07%	7.09%
International & Other												
London FTSE 100 (UK)	0.28%	-0.77%	5.43%	16.16%	6.01%	10.40%	4.16%	2.72%	6.33%	4.53%	5.51%	3.01%
Frankfurt DAX 30 (Germany)	0.84%	-0.36%	13.64%	32.86%	0.16%	6.66%	5.53%	3.90%	7.73%	5.48%	7.89%	3.57%
S&P/ASX 50 (Australia)	1.05%	-3.36%	-0.86%	12.57%	1.39%	8.69%	4.56%	5.15%	7.16%	6.08%	8.77%	8.21%
MSCI World (Net)	1.61%	2.88%	10.75%	19.86%	3.32%	10.52%	9.65%	8.85%	11.88%	8.96%	8.16%	5.47%
MSCI World ex-USA	0.57%	-0.35%	7.72%	19.64%	2.03%	8.32%	5.90%	4.94%	8.25%	5.53%	6.94%	4.46%
MSCI Europe	0.42%	-0.69%	9.88%	23.98%	3.41%	9.72%	6.54%	5.60%	8.63%	5.64%	7.00%	4.25%
MSCI Japan	-0.01%	2.76%	9.23%	20.26%	0.24%	4.60%	5.39%	3.35%	7.91%	5.43%	5.78%	3.45%
MSCI EAFE (Net)	0.38%	-0.64%	7.68%	20.38%	1.45%	7.40%	5.18%	4.22%	7.72%	5.08%	6.34%	3.84%
MSCI EM (Emerging Markets)	1.50%	-0.78%	3.12%	5.42%	-9.33%	1.86%	1.63%	1.50%	5.78%	4.00%	8.44%	6.87%
EM Latin America	9.48%	12.20%	16.64%	34.72%	8.69%	16.00%	2.45%	5.42%	3.91%	1.16%	9.55%	7.34%
EMU (European Monetary Union)	1.55%	-0.38%	13.80%	31.62%	2.40%	9.66%	6.49%	5.10%	9.19%	4.87%	6.75%	3.99%
ACWI ex-USA	0.83%	-0.46%	6.42%	15.39%	-1.43%	6.39%	4.64%	3.94%	7.60%	5.10%	6.97%	4.60%

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