

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.

October 31, 2023

Canadian Dollar (\$US/\$CA) 72.09

Name	1M	3M	YTD	1Y	2Y	3Y	4Y	5Y	10Y	15Y	20Y	25Y
Canada												
Fixed Income												
91-Day T-Bills	0.46%	1.29%	3.87%	4.59%	2.86%	1.95%	1.74%	1.73%	1.25%	-	-	-
FTSE TMX Short-Term	0.78%	0.75%	1.66%	2.40%	-0.94%	-0.98%	0.42%	1.26%	1.36%	-	-	-
FTSE TMX Universe Bond	0.37%	-2.43%	-1.09%	0.01%	-5.35%	-4.78%	-2.09%	0.25%	1.57%	-	-	-
FTSE TMX High Yield Bond	0.02%	0.07%	3.68%	6.26%	-0.83%	2.46%	2.87%	3.56%	4.69%	-	-	-
Equities												
S&P/TSX Composite	-3.21%	-7.72%	0.06%	0.43%	-2.27%	9.85%	6.68%	7.96%	6.69%	7.69%	7.52%	7.27%
S&P/TSX SmallCap	-2.58%	-8.90%	-3.67%	0.65%	-7.66%	9.35%	6.45%	4.95%	3.37%	6.32%	3.56%	-
S&P/TSX Composite Dividend	-2.80%	-6.74%	-0.71%	-0.36%	0.89%	12.26%	7.30%	8.46%	7.33%	-	-	-
S&P/TSX Equity Income	-2.97%	-7.56%	-3.28%	-3.93%	-0.08%	15.20%	6.67%	8.14%	5.75%	8.15%	-	-
S&P/TSX Preferred Share	-2.80%	-5.55%	-4.04%	-6.32%	-11.42%	0.35%	0.81%	-0.94%	0.44%	2.67%	1.73%	-
S&P/TSX Sectors												
Cdn. Energy	-1.09%	9.11%	13.26%	6.06%	32.99%	66.64%	26.01%	14.12%	3.18%	3.59%	6.52%	-
Cdn. Materials	-4.11%	-13.27%	-7.15%	1.18%	-0.60%	-1.12%	5.70%	9.32%	4.20%	4.40%	5.36%	5.50%
Cdn. Industrials	-3.50%	-8.18%	0.67%	0.99%	-0.78%	10.06%	9.96%	10.14%	10.99%	12.60%	10.38%	9.16%
Cdn. Consumer Discretionary	-2.15%	-9.63%	1.46%	2.12%	1.51%	11.51%	8.41%	8.07%	8.84%	10.82%	8.00%	7.44%
Cdn. Consumer Staples	1.90%	2.34%	2.53%	6.76%	10.26%	11.63%	9.29%	11.41%	12.24%	13.52%	9.98%	12.08%
Cdn. Health Care	-10.62%	-13.92%	7.15%	-11.01%	-37.54%	-24.55%	-27.43%	-27.67%	-11.82%	-0.63%	-3.58%	-1.89%
Cdn. Financials	-4.94%	-10.87%	-3.99%	-3.75%	-4.86%	12.11%	4.96%	6.78%	7.81%	9.37%	8.73%	-
Cdn. Information Technology	-4.27%	-11.17%	26.15%	28.82%	-12.96%	4.13%	12.73%	18.40%	18.90%	15.78%	10.60%	-
Cdn. Telecommunication Services	-1.36%	-8.46%	-12.12%	-8.41%	-4.34%	5.39%	1.95%	3.93%	7.51%	8.87%	9.52%	7.97%
Cdn. Utilities	-4.46%	-14.92%	-11.52%	-16.05%	-8.93%	-1.92%	1.20%	7.24%	6.29%	6.90%	7.35%	7.79%
Cdn. Real Estate	-5.97%	-13.24%	-9.16%	-5.52%	-14.45%	2.60%	-2.97%	0.90%	5.70%	9.51%	7.98%	8.30%
Global Gold	6.44%	-5.86%	-1.60%	15.22%	1.43%	-6.34%	3.85%	12.89%	5.52%	3.61%	2.41%	-
Global Mining	0.22%	-7.08%	-2.31%	17.08%	7.81%	8.15%	12.39%	14.55%	6.85%	6.47%	-	-
S&P/TSX Cdn. REIT	-7.43%	-15.45%	-13.01%	-7.95%	-14.08%	3.81%	-4.14%	0.50%	4.18%	8.53%	7.42%	9.61%
U.S.												
S&P 500 (LargeCap)	0.44%	-3.42%	13.36%	11.95%	2.64%	11.87%	11.66%	12.22%	14.39%	13.48%	9.57%	7.03%
Russell 2000	-4.40%	-12.30%	-2.14%	-7.07%	-8.66%	5.37%	4.28%	4.43%	8.69%	10.27%	7.59%	7.07%
Russell 2000 Growth	-5.32%	-13.98%	-0.53%	-6.12%	-12.51%	-0.49%	3.12%	3.79%	8.73%	10.99%	7.66%	6.13%
Russell 2000 Value	-3.53%	-10.68%	-4.21%	-8.46%	-5.10%	11.23%	4.64%	4.38%	8.25%	9.27%	7.24%	7.49%
International & Other												
London FTSE 100 (UK)	-1.83%	-4.58%	4.71%	14.84%	4.00%	12.69%	3.60%	4.49%	4.81%	6.51%	5.09%	3.03%
Frankfurt DAX 30 (Germany)	-1.19%	-9.01%	7.91%	21.59%	-1.59%	6.55%	3.62%	5.01%	5.44%	7.14%	7.01%	3.80%
S&P/ASX 50 (Australia)	-2.63%	-7.20%	-3.89%	5.48%	-0.69%	7.98%	3.55%	6.38%	5.12%	8.75%	8.02%	7.90%
MSCI World (Net)	-0.38%	-4.53%	10.48%	12.29%	0.44%	9.62%	8.61%	9.44%	10.64%	10.40%	7.72%	5.43%
MSCI World ex-USA	-1.72%	-6.26%	5.23%	15.05%	-0.31%	7.98%	4.52%	5.94%	6.57%	7.39%	6.21%	4.41%
MSCI Europe	-1.22%	-6.50%	7.08%	18.41%	0.62%	10.10%	5.34%	6.60%	6.61%	7.54%	6.45%	4.27%
MSCI Japan	-2.03%	-3.83%	9.15%	19.15%	-0.34%	3.56%	3.15%	4.43%	7.28%	6.66%	4.64%	3.28%
MSCI EAFE (Net)	-1.57%	-6.18%	5.22%	16.27%	-0.67%	7.18%	3.79%	5.23%	6.04%	6.88%	5.62%	3.78%
MSCI EM (Emerging Markets)	-1.38%	-7.46%	0.57%	13.08%	-7.09%	-1.97%	0.87%	3.09%	4.50%	7.02%	7.29%	7.20%
EM Latin America	-2.28%	-9.08%	10.62%	6.04%	16.79%	15.76%	1.31%	2.66%	2.54%	4.89%	8.35%	7.80%
EMU (European Monetary Union)	-0.90%	-8.36%	8.91%	22.00%	-0.81%	9.55%	4.71%	6.15%	6.57%	6.92%	6.12%	3.97%
ACWI ex-USA	-1.62%	-6.60%	3.92%	14.51%	-2.29%	4.95%	3.43%	5.09%	6.01%	7.18%	6.21%	4.57%

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