

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.

January 31, 2024

Canadian Dollar (\$US/\$CA) 74.64	-1.28%	3.54%	-1.65%	-0.36%	-2.56%	-1.56%	-0.31%	-0.38%	-1.85%	-0.53%	-0.05%	0.47%
Name	YTD	3M	6M	1Y	2Y	3Y	4Y	5Y	10Y	15Y	20Y	25Y
Canada												
Fixed Income												
91-Day T-Bill	0.46%	1.27%	2.58%	4.81%	3.48%	2.37%	1.96%	1.89%	1.35%	-	-	-
FTSE TMX Short Term Bond	-0.18%	3.12%	3.88%	3.42%	0.77%	-0.16%	0.95%	1.45%	1.56%	-	-	-
FTSE TMX Universe Bond	-1.37%	6.39%	3.80%	2.08%	-1.91%	-2.89%	-1.10%	0.75%	2.01%	-	-	-
FTSE TMX High Yield Bond	0.88%	7.03%	7.10%	8.73%	2.62%	3.29%	4.09%	5.00%	5.15%	-	-	-
Canadian Indices												
S&P/TSX Composite	0.55%	12.30%	3.63%	4.62%	3.07%	9.91%	8.26%	9.57%	7.59%	9.29%	7.62%	7.40%
S&P/TSX SmallCap	-0.37%	8.38%	-1.26%	-4.12%	-2.15%	4.28%	7.27%	6.71%	3.74%	7.18%	3.60%	-
S&P/TSX Composite Dividend	0.35%	10.80%	3.33%	3.21%	3.80%	12.26%	8.68%	9.81%	8.18%	-	-	-
S&P/TSX Equity Income	0.04%	10.64%	2.28%	-0.45%	1.22%	12.99%	7.55%	9.50%	6.71%	10.25%	-	-
S&P/TSX Preferred Share	5.81%	16.78%	10.29%	4.47%	-4.18%	2.22%	3.83%	3.88%	1.95%	3.84%	2.35%	-
S&P/TSX Sectors (\$CA)												
Cdn. Energy	0.75%	-7.36%	1.07%	1.13%	17.14%	44.52%	21.79%	14.72%	2.32%	4.41%	5.41%	-
Cdn. Materials	-6.27%	-0.41%	-13.62%	-16.46%	-1.33%	0.47%	5.00%	6.81%	3.62%	2.74%	5.03%	5.83%
Cdn. Industrials	2.11%	13.71%	4.40%	10.31%	9.31%	11.70%	11.02%	13.35%	11.81%	14.68%	10.89%	9.66%
Cdn. Consumer Discretionary	1.22%	10.55%	-0.10%	5.38%	3.79%	9.00%	11.28%	9.36%	9.69%	12.42%	8.26%	7.19%
Cdn. Consumer Staples	2.24%	6.65%	9.14%	7.40%	10.87%	15.27%	10.09%	10.80%	12.90%	13.61%	10.21%	11.73%
Cdn. Health Care	-3.70%	13.08%	-2.66%	5.72%	-24.54%	-33.29%	-24.59%	-27.64%	-12.24%	-0.16%	-3.49%	-2.20%
Cdn. Financials	-0.26%	18.28%	5.42%	4.55%	-0.53%	12.03%	8.76%	9.80%	9.63%	12.51%	9.20%	-
Cdn. Information Technology	6.32%	31.91%	17.18%	43.67%	10.43%	7.28%	16.04%	23.38%	20.23%	17.64%	10.38%	-
Cdn. Telecommunication Services	2.91%	14.08%	4.43%	-4.16%	-1.20%	7.36%	3.73%	4.91%	8.60%	10.75%	9.57%	7.69%
Cdn. Utilities	-1.24%	11.82%	-4.86%	-4.48%	-4.89%	-1.27%	1.40%	8.05%	7.34%	8.06%	7.89%	8.28%
Cdn. Real Estate	0.38%	18.16%	2.51%	-3.07%	-5.48%	4.45%	0.00%	3.53%	7.27%	11.88%	8.24%	9.03%
Global Gold	-8.01%	-2.23%	-7.96%	-12.27%	-1.24%	-2.62%	1.55%	8.34%	5.10%	0.06%	2.40%	-
Global Mining	-6.58%	2.80%	-4.48%	-9.64%	5.37%	6.16%	11.93%	12.11%	6.87%	6.37%	-	-
S&P/TSX Cdn. REIT	-1.33%	16.40%	-1.59%	-8.18%	-6.37%	4.21%	-1.40%	2.44%	5.70%	10.51%	7.76%	10.09%
U.S.												
S&P 500 (LargeCap)	3.00%	12.04%	8.21%	21.26%	8.08%	12.75%	12.87%	14.73%	14.73%	15.38%	9.74%	6.95%
Russell 2000	-2.64%	13.60%	-0.38%	2.77%	2.09%	0.82%	6.54%	7.21%	9.05%	12.48%	7.72%	7.18%
Russell 2000 Growth	-1.95%	14.21%	-1.75%	4.84%	1.43%	-4.54%	4.64%	6.57%	9.01%	13.02%	7.88%	5.92%
Russell 2000 Value	-3.30%	13.00%	0.94%	0.27%	2.31%	6.14%	7.68%	7.15%	8.69%	11.66%	7.30%	7.97%
International & Other												
London FTSE 100 (UK)	-0.17%	6.23%	1.37%	5.79%	4.93%	8.98%	4.23%	5.47%	4.81%	7.82%	4.85%	3.10%
Frankfurt DAX 30 (Germany)	0.30%	12.98%	2.80%	11.96%	5.57%	5.63%	6.57%	7.87%	5.81%	8.86%	6.72%	4.18%
S&P/ASX 50 (Australia)	-0.29%	15.25%	6.95%	1.92%	10.80%	7.25%	6.34%	8.40%	7.19%	10.81%	8.31%	8.22%
MSCI World (Net)	2.52%	12.15%	7.08%	17.42%	6.79%	9.77%	10.20%	11.82%	11.20%	12.07%	7.82%	5.48%
MSCI World ex-USA	1.75%	11.98%	4.97%	10.48%	6.35%	7.17%	6.70%	8.03%	7.31%	8.82%	6.20%	4.61%
MSCI Europe	1.19%	11.34%	4.10%	11.30%	6.63%	8.63%	7.30%	8.74%	7.12%	9.19%	6.29%	4.45%
MSCI Japan	5.98%	14.51%	10.12%	19.39%	8.32%	4.55%	6.21%	7.42%	8.23%	7.55%	5.04%	3.56%
MSCI EAFE (Net)	1.88%	11.80%	4.88%	10.41%	6.11%	6.25%	5.99%	7.33%	6.74%	8.29%	5.60%	3.98%
MSCI EM (Emerging Markets)	-3.39%	3.42%	-4.29%	-2.20%	-4.81%	-5.68%	0.99%	1.76%	5.19%	7.64%	6.81%	7.23%
EM Latin America	-4.85%	15.84%	-1.11%	8.54%	5.30%	3.50%	-2.04%	-2.98%	-1.32%	1.35%	4.23%	5.69%
EMU (European Monetary Union)	1.80%	13.04%	3.59%	11.95%	6.80%	8.00%	7.45%	8.67%	7.29%	8.58%	5.93%	4.12%
ACWI ex-USA	0.31%	9.53%	2.31%	6.81%	3.07%	3.24%	5.02%	6.23%	6.67%	8.41%	6.08%	4.69%

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