

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.

Compound Returns

31-Aug-25	1m	2m	3m	6m	YTD	1Y	2Y	3Y	4Y	5Y	10Y	15Y	20Y
Canadian Fixed Income													
Bank of Canada 91 Day T-bill (CAD)	0.22%	0.44%	0.66%	1.31%	1.79%	2.96%	3.89%	4.06%	3.30%	2.65%	1.80%	1.49%	1.72%
FTSE Canada Short Term Overall Bond Index (CAD)	0.56%	0.49%	0.76%	1.32%	2.69%	4.70%	6.08%	4.67%	2.05%	1.75%	1.97%	2.22%	2.86%
FTSE Canada Universe Bond Index (CAD)	0.37%	-0.37%	-0.31%	-1.21%	1.07%	2.95%	5.39%	3.82%	-0.17%	-0.47%	1.80%	2.74%	3.36%
FTSE Canada High Yield Overall Bond Index (CAD)	0.92%	1.72%	2.76%	3.58%	4.94%	9.61%	11.24%	9.14%	5.09%	6.27%	6.59%	5.99%	6.37%
Bloomberg Global Aggregate Bond Index (CAD)	0.75%	0.56%	1.69%	0.17%	2.35%	5.41%	5.95%	5.03%	-0.27%	-0.72%	1.45%	2.87%	3.05%
Canadian Equities													
S&P/TSX Composite Index (CAD)	4.96%	6.74%	9.85%	14.09%	17.59%	25.86%	22.26%	17.48%	11.88%	14.97%	10.82%	9.22%	8.16%
S&P/TSX Composite Dividend Index (CAD)	4.20%	5.40%	7.81%	12.71%	16.32%	21.95%	20.69%	15.58%	12.97%	15.79%	11.31%	9.58%	N/A
S&P/TSX Preferred Share Index (CAD)	0.22%	3.42%	6.28%	8.04%	10.97%	15.39%	22.71%	9.71%	5.32%	9.02%	5.92%	4.04%	3.43%
S&P/TSX Small-Cap Index (CAD)	9.34%	10.97%	17.84%	27.19%	25.11%	30.76%	22.19%	16.21%	9.82%	14.91%	9.32%	6.04%	5.16%
Sectors													
S&P/TSX Capped REIT Index (CAD)	3.32%	3.75%	5.05%	11.40%	12.67%	2.44%	6.46%	4.27%	-0.32%	7.11%	6.18%	6.89%	7.03%
S&P/TSX Capped Income Trust Index	2.07%	1.38%	2.85%	7.29%	9.38%	5.56%	8.10%	2.45%	0.52%	7.39%	7.06%	9.01%	7.82%
MSCI U.S. REIT Index (CAD)	3.71%	4.25%	2.83%	-5.84%	-1.17%	1.64%	11.15%	7.47%	3.65%	9.49%	7.14%	10.44%	7.45%
S&P/TSX Capped Financial Index (CAD)	4.27%	5.79%	9.62%	14.36%	17.17%	32.25%	29.72%	20.82%	14.45%	19.49%	13.18%	12.50%	10.28%
S&P/TSX Capped Real Estate Index (CAD)	3.75%	8.63%	10.18%	12.36%	12.15%	6.06%	10.43%	7.37%	1.22%	8.54%	6.94%	8.84%	7.64%
S&P/TSX Capped Energy Index (CAD)	1.90%	5.90%	11.83%	8.91%	7.28%	3.05%	7.37%	9.92%	28.01%	33.63%	8.02%	3.53%	2.60%
S&P/TSX Capped Materials Index (CAD)	15.87%	15.91%	20.21%	34.38%	50.86%	48.26%	32.35%	26.37%	17.72%	12.36%	14.05%	4.30%	7.84%
S&P/TSX Global Gold Index (CAD)	20.68%	23.27%	27.37%	53.69%	82.79%	70.55%	51.74%	42.57%	22.89%	12.05%	18.59%	4.30%	7.03%
WTI Crude Oil (CAD)	-8.22%	-1.08%	5.14%	-12.55%	-14.80%	-11.34%	-11.87%	-9.17%	0.38%	9.48%	2.92%	0.87%	0.32%
US Equities													
S&P 500 Index (CAD)	1.32%	4.96%	9.46%	4.09%	5.76%	18.05%	22.27%	21.44%	13.29%	15.95%	14.96%	16.98%	11.62%
Dow Jones Industrial Average (CAD)	2.71%	4.23%	8.06%	-0.10%	3.39%	13.53%	17.49%	17.10%	10.91%	13.22%	13.47%	15.13%	11.03%
Russell 2000 Index (CAD)	6.40%	9.68%	14.76%	5.05%	2.20%	10.19%	14.04%	12.03%	4.59%	11.28%	9.22%	12.94%	8.78%
NASDAQ Composite Total Return Index (CAD)	0.94%	6.08%	12.26%	8.88%	6.53%	24.23%	25.44%	24.89%	12.03%	14.79%	17.66%	19.90%	14.09%
International Equities													
MSCI World Net Index (CAD)	1.90%	4.57%	8.26%	5.50%	8.61%	17.84%	20.86%	20.38%	11.32%	14.08%	12.00%	13.35%	9.27%
MSCI All Country World Index (CAD)	1.80%	4.58%	8.49%	6.31%	9.46%	18.49%	20.87%	20.00%	10.91%	13.63%	11.99%	13.05%	9.50%
MSCI All Country World Ex US Index (CAD)	2.82%	3.91%	6.67%	10.37%	16.64%	18.28%	18.31%	17.61%	8.06%	10.64%	8.20%	8.79%	6.94%
MSCI EAFE Net Index (CAD)	3.54%	3.44%	4.91%	9.07%	17.22%	16.00%	17.46%	18.90%	8.72%	11.31%	7.74%	9.11%	6.43%
MSCI Europe Net Index (CAD)	2.72%	2.23%	3.54%	7.53%	19.35%	15.40%	17.35%	20.34%	9.10%	12.16%	7.75%	9.27%	6.49%
MSCI Emerging Markets Net Index (CAD)	0.58%	3.90%	9.31%	10.91%	13.62%	18.99%	16.79%	12.58%	3.70%	6.31%	7.25%	6.01%	6.99%

Calendar Year Returns

31-Aug-25	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012
Consumer Price Index (CAD)	1.83%	3.40%	6.32%	4.80%	0.73%	2.25%	1.99%	1.86%	1.50%	1.53%	1.47%	1.24%	0.83%
Bank of Canada 91 Day T-bill (CAD)	4.31%	4.77%	2.32%	0.12%	0.39%	1.66%	1.40%	0.71%	0.50%	0.51%	0.91%	0.97%	0.95%
FTSE Canada Short Term Overall Bond Index (CAD)	5.70%	5.02%	-4.04%	-0.93%	5.29%	3.10%	1.91%	0.08%	1.01%	2.61%	3.06%	1.74%	2.01%
FTSE Canada Universe Bond Index (CAD)	4.23%	6.69%	-11.69%	-2.54%	8.68%	6.87%	1.41%	2.52%	1.66%	3.52%	8.79%	-1.19%	3.60%
FTSE Canada High Yield Overall Bond Index (CAD)	11.48%	10.00%	-5.44%	6.18%	6.69%	8.48%	2.15%	9.94%	16.93%	-3.81%	2.54%	5.41%	14.75%
Bloomberg Global Aggregate Bond Index (CAD)	7.23%	2.88%	-10.16%	-5.52%	7.28%	1.44%	7.70%	0.34%	-1.45%	16.15%	9.65%	3.94%	2.01%
S&P/TSX Composite Index (CAD)	21.65%	11.73%	-5.84%	25.09%	5.59%	22.88%	-8.88%	9.10%	21.09%	-8.32%	10.56%	12.99%	7.18%
S&P/TSX Small-Cap Index (CAD)	18.83%	4.79%	-9.29%	20.27%	12.87%	15.84%	-18.17%	2.75%	38.48%	-13.31%	-2.34%	7.60%	-2.23%
S&P 500 Net Total Return Index (CAD)	36.36%	22.30%	-12.59%	27.07%	15.69%	24.09%	3.62%	13.15%	7.38%	20.83%	23.18%	40.37%	12.67%
Dow Jones Industrial Average (CAD)	25.42%	13.07%	-0.09%	19.92%	7.80%	19.01%	5.21%	19.69%	12.47%	20.19%	19.96%	38.35%	7.80%
NASDAQ Composite Total Return Index (CAD)	41.33%	40.76%	-27.63%	21.14%	42.38%	29.78%	5.91%	21.12%	5.10%	28.28%	25.09%	49.52%	14.85%
Russell 2000 Index (CAD)	21.65%	13.79%	-14.65%	13.84%	17.86%	19.18%	-3.00%	7.10%	17.08%	14.64%	14.35%	48.14%	13.78%
MSCI World Net Index (CAD)	29.43%	20.47%	-12.19%	20.78%	13.87%	21.22%	-0.49%	14.36%	3.79%	18.89%	14.39%	35.18%	13.26%
MSCI All Country World Index (CAD)	28.49%	19.48%	-12.03%	17.97%	14.76%	20.89%	-0.72%	16.47%	4.78%	17.77%	14.19%	31.77%	14.24%
MSCI All Country World Ex US Index (CAD)	15.72%	13.09%	-9.43%	7.37%	9.18%	15.96%	-6.01%	19.38%	1.38%	13.63%	5.27%	23.55%	14.79%
MSCI EAFE Net Index (CAD)	13.24%	15.07%	-8.23%	10.32%	5.92%	15.85%	-6.03%	16.82%	-2.49%	18.95%	3.67%	31.02%	14.72%
MSCI Emerging Markets Net Index (CAD)	17.25%	6.88%	-14.28%	-3.37%	16.23%	12.43%	-6.88%	28.26%	7.34%	2.04%	6.63%	3.93%	15.61%

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