

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

28-Feb-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)	0.23%	0.47%	0.73%	1.62%	0.47%	3.96%	4.41%	3.93%	2.98%	2.41%	1.69%	1.42%	1.72%
FTSE Canada Short Term Overall Bond Index (CAD)	0.46%	1.35%	1.73%	3.34%	1.35%	7.28%	5.76%	2.96%	1.86%	2.06%	1.87%	2.29%	2.92%
FTSE Canada Universe Bond Index (CAD)	1.10%	2.31%	1.60%	4.21%	2.31%	8.48%	6.11%	1.56%	0.39%	0.53%	1.76%	3.14%	3.71%
FTSE Canada High Yield Overall Bond Index (CAD)	0.70%	1.32%	2.13%	5.82%	1.32%	11.04%	10.51%	6.08%	5.15%	5.55%	6.05%	6.18%	6.37%
Bloomberg Global Aggregate Bond Index (CAD)	0.89%	2.17%	2.70%	5.23%	2.17%	9.37%	5.99%	1.38%	-0.29%	-0.56%	1.89%	3.19%	2.82%
Canadian Equities													
S&P/TSX Composite Index (CAD)	-0.40%	3.06%	-0.31%	10.31%	3.06%	22.45%	15.62%	9.71%	12.22%	12.72%	8.49%	8.54%	8.03%
S&P/TSX Composite Dividend Index (CAD)	0.14%	3.20%	-0.12%	8.19%	3.20%	20.73%	13.97%	9.33%	13.89%	12.76%	8.98%	9.04%	N/A
S&P/TSX Preferred Share Index (CAD)	0.45%	2.71%	5.37%	6.80%	2.71%	20.90%	12.99%	4.37%	5.54%	7.81%	3.79%	3.74%	3.11%
S&P/TSX Small-Cap Index (CAD)	-2.27%	-1.63%	-4.88%	2.80%	-1.63%	16.42%	8.04%	2.11%	5.00%	11.50%	5.45%	4.79%	3.74%
Sectors													
S&P/TSX Capped REIT Index (CAD)	2.07%	1.14%	-4.85%	-8.04%	1.14%	2.45%	-3.92%	-4.62%	2.25%	-0.38%	3.82%	7.08%	7.04%
S&P/TSX Capped Income Trust Index	1.36%	1.95%	-5.02%	-1.61%	1.95%	10.73%	0.92%	-2.26%	2.61%	2.23%	5.23%	8.81%	8.26%
MSCI U.S. REIT Index (CAD)	3.15%	4.95%	-0.16%	7.94%	4.95%	23.79%	14.11%	7.24%	11.20%	8.31%	7.37%	11.96%	8.41%
S&P/TSX Capped Financial Index (CAD)	-0.23%	2.45%	0.78%	15.65%	2.45%	30.63%	18.50%	10.45%	15.38%	14.75%	11.27%	11.34%	9.99%
S&P/TSX Capped Real Estate Index (CAD)	-0.63%	-0.19%	-6.20%	-5.61%	-0.19%	5.97%	0.62%	-1.88%	3.31%	1.64%	4.75%	8.85%	7.46%
S&P/TSX Capped Energy Index (CAD)	-1.83%	-1.49%	-5.36%	-5.37%	-1.49%	4.07%	8.98%	12.42%	29.03%	22.71%	5.25%	2.77%	3.72%
S&P/TSX Capped Materials Index (CAD)	1.85%	12.26%	6.28%	10.33%	12.26%	48.63%	15.26%	7.85%	11.48%	13.86%	7.33%	3.35%	6.02%
S&P/TSX Global Gold Index (CAD)	2.47%	18.93%	11.94%	10.97%	18.93%	65.75%	25.23%	10.69%	12.87%	12.18%	9.78%	2.84%	4.54%
WTI Crude Oil (CAD)	-4.33%	-2.57%	5.55%	1.38%	-2.57%	-5.33%	-2.12%	-6.11%	6.59%	10.69%	4.86%	1.14%	2.28%
US Equities													
S&P 500 Index (CAD)	-1.83%	1.61%	1.88%	13.41%	1.61%	25.76%	27.84%	17.43%	17.22%	18.52%	14.60%	16.41%	11.33%
Dow Jones Industrial Average (CAD)	-1.92%	3.49%	0.84%	13.64%	3.49%	21.51%	21.54%	15.99%	14.93%	15.40%	13.29%	15.08%	10.76%
Russell 2000 Index (CAD)	-5.85%	-2.71%	-8.32%	4.90%	-2.71%	13.31%	11.46%	7.82%	4.23%	10.94%	8.77%	12.36%	8.63%
NASDAQ Composite Total Return Index (CAD)	-4.42%	-2.15%	1.06%	14.10%	-2.15%	25.26%	32.94%	16.82%	13.78%	19.67%	17.02%	18.87%	13.71%
International Equities													
MSCI World Net Index (CAD)	-1.25%	2.95%	2.99%	11.70%	2.95%	22.80%	23.64%	14.99%	13.97%	15.53%	11.41%	12.74%	8.93%
MSCI All Country World Index (CAD)	-1.10%	2.96%	3.28%	11.45%	2.96%	22.72%	22.89%	14.32%	12.82%	14.86%	11.22%	12.50%	9.15%
MSCI All Country World Ex US Index (CAD)	0.86%	5.68%	6.48%	7.16%	5.68%	17.08%	14.85%	9.72%	7.26%	9.61%	6.85%	8.10%	6.41%
MSCI EAFE Net Index (CAD)	1.40%	7.47%	7.88%	6.35%	7.47%	15.52%	14.75%	11.04%	8.98%	10.25%	6.79%	8.32%	5.90%
MSCI Europe Net Index (CAD)	3.12%	10.99%	11.22%	7.32%	10.99%	18.10%	15.10%	12.05%	10.77%	11.30%	6.94%	8.59%	6.01%
MSCI Emerging Markets Net Index (CAD)	-0.05%	2.45%	5.09%	7.28%	2.45%	16.91%	12.53%	4.82%	0.75%	5.74%	4.98%	5.70%	6.51%

Calendar Year Returns

28-Feb-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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