

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-26	1m	2m	3m	6m	YTD	1Y	2Y	3Y	4Y	5Y	10Y	15Y	20Y
Canadian Fixed Income													
Bank of Canada 91 Day T-bill (CAD)	0.18%	0.36%	0.54%	1.10%	0.36%	2.43%	3.19%	3.74%	3.56%	2.87%	1.89%	1.54%	1.69%
FTSE Canada Short Term Overall Bond Index (CAD)	0.70%	1.15%	0.90%	2.33%	1.15%	3.68%	5.46%	5.06%	3.14%	2.23%	2.17%	2.38%	3.00%
FTSE Canada Universe Bond Index (CAD)	1.66%	2.25%	0.94%	3.84%	2.25%	2.58%	5.49%	4.92%	1.82%	0.83%	2.06%	3.02%	3.57%
FTSE Canada High Yield Overall Bond Index (CAD)	0.59%	1.35%	1.68%	3.92%	1.35%	7.64%	9.33%	9.54%	6.47%	5.64%	7.62%	5.78%	6.66%
Bloomberg Global Aggregate Bond Index (CAD)	1.84%	1.55%	0.11%	2.29%	1.55%	2.47%	5.86%	4.80%	1.65%	0.25%	1.23%	3.52%	3.49%
Canadian Equities													
S&P/TSX Composite Index (CAD)	7.72%	8.63%	10.06%	21.65%	8.63%	38.80%	30.37%	22.88%	16.36%	17.09%	13.67%	9.31%	8.68%
S&P/TSX Composite Dividend Index (CAD)	8.19%	10.18%	11.87%	21.71%	10.18%	37.18%	28.69%	21.23%	15.71%	18.21%	13.71%	9.79%	8.97%
S&P/TSX Preferred Share Index (CAD)	0.89%	1.28%	2.85%	5.91%	1.28%	14.42%	17.61%	13.47%	6.80%	7.26%	8.01%	4.02%	3.64%
S&P/TSX Small-Cap Index (CAD)	12.56%	22.37%	25.29%	46.89%	22.37%	86.83%	47.48%	29.68%	18.76%	17.82%	14.17%	6.97%	6.65%
Sectors													
S&P/TSX Capped REIT Index (CAD)	1.36%	6.45%	6.66%	3.96%	6.45%	15.82%	8.93%	2.25%	0.12%	4.83%	6.41%	6.30%	6.56%
S&P/TSX Capped Income Trust Index	4.54%	9.31%	7.24%	12.96%	9.31%	21.19%	15.84%	7.27%	3.14%	6.09%	8.17%	8.22%	8.04%
MSCI U.S. REIT Index (CAD)	8.68%	10.66%	6.26%	9.87%	10.66%	3.45%	13.16%	10.44%	6.28%	9.61%	7.31%	10.38%	7.57%
S&P/TSX Capped Financial Index (CAD)	2.66%	1.10%	5.52%	16.76%	1.10%	33.52%	32.07%	23.31%	15.82%	18.80%	15.26%	12.39%	10.23%
S&P/TSX Capped Real Estate Index (CAD)	-0.30%	1.42%	1.24%	-5.48%	1.42%	6.21%	6.09%	2.45%	0.09%	3.88%	6.14%	7.39%	6.92%
S&P/TSX Capped Energy Index (CAD)	10.60%	23.01%	20.04%	34.50%	23.01%	46.48%	23.47%	20.27%	20.11%	32.34%	13.03%	3.52%	3.95%
S&P/TSX Capped Materials Index (CAD)	21.68%	32.45%	36.08%	76.22%	32.45%	136.81%	87.61%	46.53%	31.29%	29.61%	19.69%	7.28%	9.82%
S&P/TSX Global Gold Index (CAD)	23.59%	35.03%	38.23%	81.91%	35.03%	179.57%	115.26%	63.67%	39.54%	35.32%	21.52%	8.58%	8.72%
WTI Crude Oil (CAD)	3.51%	16.13%	11.99%	4.01%	16.13%	-9.04%	-7.20%	-4.48%	-6.85%	3.26%	7.10%	-0.27%	1.32%
US Equities													
S&P 500 Index (CAD)	-0.05%	0.17%	-1.44%	6.41%	0.17%	10.76%	18.02%	21.88%	15.73%	15.90%	15.58%	16.26%	11.89%
Dow Jones Industrial Average (CAD)	1.03%	1.61%	0.82%	7.64%	1.61%	7.54%	14.31%	16.68%	13.82%	13.41%	13.96%	14.76%	11.35%
Russell 2000 Index (CAD)	1.53%	5.66%	3.30%	11.16%	5.66%	16.77%	15.03%	13.20%	9.99%	6.62%	11.37%	12.02%	9.06%
NASDAQ Composite Total Return Index (CAD)	-2.64%	-2.89%	-4.96%	5.25%	-2.89%	14.59%	19.81%	26.52%	16.26%	13.94%	18.53%	18.80%	14.27%
International Equities													
MSCI World Net Index (CAD)	1.45%	2.47%	1.57%	8.88%	2.47%	14.87%	18.77%	20.65%	14.96%	14.15%	13.36%	12.92%	9.43%
MSCI All Country World Index (CAD)	2.04%	3.81%	3.17%	11.06%	3.81%	18.07%	20.37%	21.26%	15.25%	13.85%	13.58%	12.85%	9.70%
MSCI All Country World Ex US Index (CAD)	5.79%	10.77%	12.21%	20.48%	10.77%	32.98%	24.78%	20.60%	15.12%	11.98%	11.10%	9.34%	7.32%
MSCI EAFE Net Index (CAD)	5.38%	9.53%	10.93%	16.86%	9.53%	27.47%	21.35%	18.84%	14.93%	12.45%	10.33%	9.35%	6.74%
MSCI Europe Net Index (CAD)	4.01%	7.32%	9.65%	16.06%	7.32%	24.79%	21.40%	18.24%	15.11%	13.44%	10.37%	9.41%	6.94%
MSCI Emerging Markets Net Index (CAD)	6.25%	14.26%	15.71%	28.01%	14.26%	41.98%	28.83%	21.60%	13.08%	7.91%	10.76%	7.42%	7.13%

Calendar Year Returns

28-Feb-26	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013
Consumer Price Index (CAD)	2.36%	1.83%	3.40%	6.32%	4.80%	0.73%	2.25%	1.99%	1.86%	1.50%	1.53%	1.47%	1.24%
Bank of Canada 91 Day T-bill (CAD)	2.54%	4.31%	4.77%	2.32%	0.12%	0.39%	1.66%	1.40%	0.71%	0.50%	0.51%	0.91%	0.97%
FTSE Canada Short Term Overall Bond Index (CAD)	3.88%	5.70%	5.02%	-4.04%	-0.93%	5.29%	3.10%	1.91%	0.08%	1.01%	2.61%	3.06%	1.74%
FTSE Canada Universe Bond Index (CAD)	2.64%	4.23%	6.69%	-11.69%	-2.54%	8.68%	6.87%	1.41%	2.52%	1.66%	3.52%	8.79%	-1.19%
FTSE Canada High Yield Overall Bond Index (CAD)	7.61%	11.48%	10.00%	-5.44%	6.18%	6.69%	8.48%	2.15%	9.94%	16.93%	-3.81%	2.54%	5.41%
Bloomberg Global Aggregate Bond Index (CAD)	3.09%	7.23%	2.88%	-10.16%	-5.52%	7.28%	1.44%	7.70%	0.34%	-1.45%	16.15%	9.65%	3.94%
S&P/TSX Composite Index (CAD)	31.68%	21.65%	11.73%	-5.84%	25.09%	5.59%	22.88%	-8.88%	9.10%	21.09%	-8.32%	10.56%	12.99%
S&P/TSX Small-Cap Index (CAD)	50.19%	18.83%	4.79%	-9.29%	20.27%	12.87%	15.84%	-18.17%	2.75%	38.48%	-13.31%	-2.34%	7.60%
S&P 500 Net Total Return Index (CAD)	11.92%	35.80%	22.30%	-12.59%	27.07%	15.69%	24.09%	3.62%	13.15%	7.38%	20.83%	23.18%	40.37%
Dow Jones Industrial Average (CAD)	9.53%	25.42%	13.07%	-0.09%	19.92%	7.80%	19.01%	5.21%	19.69%	12.47%	20.19%	19.96%	38.35%
NASDAQ Composite Total Return Index (CAD)	15.46%	41.33%	40.76%	-27.63%	21.14%	42.38%	29.78%	5.91%	21.12%	5.10%	28.28%	25.09%	49.52%
Russell 2000 Index (CAD)	7.52%	21.65%	13.79%	-14.65%	13.84%	17.86%	19.18%	-3.00%	7.10%	17.08%	14.64%	14.35%	48.14%
MSCI World Net Index (CAD)	15.41%	29.43%	20.47%	-12.19%	20.78%	13.87%	21.22%	-0.49%	14.36%	3.79%	18.89%	14.39%	35.18%
MSCI All Country World Index (CAD)	17.10%	28.49%	19.48%	-12.03%	17.97%	14.76%	20.89%	-0.72%	16.47%	4.78%	17.77%	14.19%	31.77%
MSCI All Country World Ex US Index (CAD)	26.87%	15.72%	13.09%	-9.43%	7.37%	9.18%	15.96%	-6.01%	19.38%	1.38%	13.63%	5.27%	23.55%
MSCI EAFE Net Index (CAD)	25.07%	13.24%	15.07%	-8.23%	10.32%	5.92%	15.85%	-6.03%	16.82%	-2.49%	18.95%	3.67%	31.02%
MSCI Emerging Markets Net Index (CAD)	27.30%	17.25%	6.88%	-14.28%	-3.37%	16.23%	12.43%	-6.88%	28.26%	7.34%	2.04%	6.63%	3.93%

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