

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

30-Jun-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)	0.19%	0.38%	0.57%	1.12%	1.12%	2.32%	2.77%	3.49%	3.63%	3.02%	1.95%	1.57%	1.66%
FTSE Canada Short Term Overall Bond Index (CAD)	0.37%	1.11%	1.19%	1.45%	1.45%	3.13%	4.72%	5.02%	4.09%	2.25%	2.10%	2.29%	3.00%
FTSE Canada Universe Bond Index (CAD)	0.51%	1.89%	2.01%	2.24%	2.24%	3.46%	4.78%	4.42%	4.10%	0.80%	1.71%	2.86%	3.64%
FTSE Canada High Yield Overall Bond Index (CAD)	0.61%	1.61%	2.51%	3.08%	3.08%	7.51%	8.76%	9.86%	8.74%	5.42%	6.88%	5.79%	6.62%
Bloomberg Global Aggregate Bond Index (CAD)	2.26%	3.85%	2.55%	3.28%	3.28%	4.62%	6.59%	5.84%	4.67%	1.17%	1.27%	3.46%	3.62%
Canadian Equities													
S&P/TSX Composite Index (CAD)	0.50%	3.03%	6.96%	11.17%	11.17%	32.88%	29.58%	23.48%	20.07%	14.85%	12.79%	9.86%	8.79%
S&P/TSX Composite Dividend Index (CAD)	1.03%	3.37%	7.11%	13.75%	13.75%	32.43%	28.28%	22.74%	18.90%	15.95%	12.88%	10.30%	9.12%
S&P/TSX Preferred Share Index (CAD)	-0.08%	1.48%	4.02%	4.39%	4.39%	12.89%	15.01%	16.89%	9.81%	6.47%	7.07%	4.10%	3.81%
S&P/TSX Small-Cap Index (CAD)	-3.95%	-0.73%	5.94%	18.00%	18.00%	57.19%	39.10%	30.34%	23.58%	14.99%	11.10%	7.23%	6.40%
Sectors													
S&P/TSX Capped REIT Index (CAD)	2.08%	3.84%	12.18%	13.57%	13.57%	15.07%	14.62%	7.59%	6.11%	2.99%	5.46%	6.42%	6.96%
S&P/TSX Capped Income Trust Index	0.43%	5.63%	9.83%	14.80%	14.80%	19.94%	19.40%	9.79%	7.40%	4.85%	7.12%	8.14%	8.09%
MSCI U.S. REIT Index (CAD)	6.16%	7.23%	14.02%	21.70%	21.70%	25.97%	16.97%	15.04%	11.76%	8.75%	7.02%	11.00%	8.02%
S&P/TSX Capped Financial Index (CAD)	8.78%	13.51%	25.57%	23.17%	23.17%	50.49%	44.18%	33.53%	26.00%	19.88%	16.50%	13.93%	11.64%
S&P/TSX Capped Real Estate Index (CAD)	3.05%	3.64%	8.43%	3.76%	3.76%	5.05%	9.28%	5.92%	5.19%	1.61%	5.05%	7.29%	7.07%
S&P/TSX Capped Energy Index (CAD)	-7.89%	-12.63%	-11.42%	26.15%	26.15%	46.08%	19.31%	23.07%	17.72%	26.50%	10.85%	4.59%	3.69%
S&P/TSX Capped Materials Index (CAD)	-12.07%	-6.62%	-11.53%	-1.89%	-1.89%	51.29%	45.06%	32.87%	27.20%	20.23%	13.05%	5.80%	7.74%
S&P/TSX Global Gold Index (CAD)	-13.17%	-10.05%	-15.38%	-5.86%	-5.86%	56.33%	57.63%	42.39%	33.22%	23.40%	13.42%	6.57%	6.16%
WTI Crude Oil (CAD)	-18.06%	-31.05%	-30.31%	25.28%	25.28%	10.99%	-5.99%	1.80%	-7.79%	1.62%	4.55%	0.41%	0.88%
US Equities													
S&P 500 Index (CAD)	2.01%	8.68%	17.12%	14.07%	14.07%	27.19%	20.86%	23.45%	23.26%	16.53%	16.53%	17.33%	12.76%
Dow Jones Industrial Average (CAD)	5.78%	10.20%	15.26%	13.60%	13.60%	25.44%	19.79%	19.85%	19.18%	13.83%	14.69%	15.51%	11.98%
Russell 2000 Index (CAD)	6.84%	12.86%	23.51%	26.86%	26.86%	46.38%	25.37%	21.39%	19.81%	9.94%	12.61%	13.40%	10.21%
NASDAQ Composite Total Return Index (CAD)	0.16%	9.92%	23.62%	17.10%	17.10%	34.62%	24.61%	27.68%	28.10%	16.52%	20.50%	20.37%	15.75%
International Equities													
MSCI World Net Index (CAD)	2.25%	8.20%	15.65%	13.54%	13.54%	26.16%	20.94%	22.04%	21.93%	14.55%	14.14%	13.81%	10.03%
MSCI All Country World Index (CAD)	2.20%	8.82%	16.98%	15.40%	15.40%	29.13%	22.59%	23.07%	22.35%	14.60%	14.38%	13.75%	10.37%
MSCI All Country World Ex US Index (CAD)	2.42%	8.95%	16.60%	18.00%	18.00%	33.36%	25.47%	22.23%	20.71%	12.36%	11.44%	9.84%	7.62%
MSCI EAFE Net Index (CAD)	3.06%	7.50%	12.66%	13.28%	13.28%	25.01%	21.14%	19.18%	19.84%	12.05%	10.63%	9.71%	6.83%
MSCI Europe Net Index (CAD)	3.95%	7.97%	12.78%	11.58%	11.58%	23.35%	20.67%	18.92%	20.40%	12.52%	10.90%	9.65%	6.93%
MSCI Emerging Markets Net Index (CAD)	1.54%	12.72%	26.11%	28.18%	28.18%	49.21%	30.97%	25.92%	20.15%	10.15%	11.05%	7.98%	8.07%

Calendar Year Returns

30-Jun-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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