

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-May-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%	1.11%	0.93%	2.35%	2.87%	3.57%	3.63%	2.98%	1.93%	1.56%	1.67%
FTSE Canada Short Term Overall Bond Index (CAD)	0.74%	0.81%	-0.08%	0.82%	1.07%	3.02%	4.92%	4.77%	3.79%	2.13%	2.10%	2.27%	2.97%
FTSE Canada Universe Bond Index (CAD)	1.36%	1.49%	-0.51%	0.42%	1.72%	2.99%	5.10%	4.25%	3.39%	0.89%	1.84%	2.82%	3.59%
FTSE Canada High Yield Overall Bond Index (CAD)	0.99%	1.89%	1.09%	2.79%	2.45%	7.95%	8.46%	9.75%	8.06%	5.48%	6.97%	5.72%	6.58%
Bloomberg Global Aggregate Bond Index (CAD)	1.55%	0.28%	-0.55%	-0.43%	0.99%	3.45%	5.68%	4.12%	3.75%	1.03%	1.26%	3.29%	3.52%
Canadian Equities													
S&P/TSX Composite Index (CAD)	2.52%	6.42%	1.83%	12.08%	10.61%	36.07%	28.34%	24.64%	17.22%	15.30%	12.77%	9.57%	8.72%
S&P/TSX Composite Dividend Index (CAD)	2.32%	6.02%	2.20%	14.32%	12.60%	34.09%	26.45%	23.57%	16.05%	15.98%	12.80%	10.05%	9.03%
S&P/TSX Preferred Share Index (CAD)	1.56%	4.10%	3.15%	6.09%	4.47%	16.11%	15.04%	17.42%	8.35%	6.44%	7.01%	4.11%	3.83%
S&P/TSX Small-Cap Index (CAD)	3.36%	10.29%	0.40%	25.79%	22.85%	73.78%	40.56%	32.36%	20.41%	16.03%	12.12%	7.09%	6.49%
Sectors													
S&P/TSX Capped REIT Index (CAD)	1.73%	9.90%	4.51%	11.47%	11.26%	14.15%	13.24%	6.77%	2.72%	3.27%	5.86%	6.24%	6.94%
S&P/TSX Capped Income Trust Index	5.17%	9.36%	4.57%	11.84%	14.31%	21.16%	17.79%	9.34%	5.21%	5.49%	7.50%	8.08%	8.06%
MSCI U.S. REIT Index (CAD)	1.01%	7.40%	3.59%	10.08%	14.63%	17.04%	15.37%	13.61%	8.55%	8.56%	7.01%	10.28%	8.03%
S&P/TSX Capped Financial Index (CAD)	4.35%	15.43%	12.00%	18.18%	13.23%	43.35%	36.96%	31.63%	20.58%	18.04%	15.19%	13.15%	11.05%
S&P/TSX Capped Real Estate Index (CAD)	0.57%	5.22%	-0.73%	0.51%	0.69%	3.39%	7.98%	5.10%	1.72%	1.84%	4.97%	7.05%	7.04%
S&P/TSX Capped Energy Index (CAD)	-5.14%	-3.83%	11.35%	33.66%	36.96%	67.49%	21.34%	28.29%	15.57%	30.75%	11.78%	4.76%	4.19%
S&P/TSX Capped Materials Index (CAD)	6.20%	0.62%	-15.76%	14.63%	11.58%	78.44%	51.10%	39.04%	26.21%	21.81%	15.92%	6.36%	8.34%
S&P/TSX Global Gold Index (CAD)	3.59%	-2.55%	-19.71%	10.99%	8.42%	86.02%	67.30%	46.77%	34.25%	24.13%	17.28%	7.15%	6.78%
WTI Crude Oil (CAD)	-15.85%	-14.94%	31.66%	47.44%	52.90%	43.98%	7.08%	9.15%	-4.56%	8.48%	6.41%	1.23%	2.13%
US Equities													
S&P 500 Index (CAD)	6.54%	14.81%	11.63%	10.02%	11.82%	30.03%	22.02%	24.16%	20.62%	17.18%	16.25%	17.02%	12.71%
Dow Jones Industrial Average (CAD)	4.18%	8.96%	5.69%	6.56%	7.39%	22.94%	17.41%	18.37%	16.11%	13.12%	14.07%	14.97%	11.72%
Russell 2000 Index (CAD)	5.63%	15.60%	12.37%	16.08%	18.74%	43.35%	20.96%	20.79%	15.92%	9.45%	11.78%	12.69%	9.94%
NASDAQ Composite Total Return Index (CAD)	9.74%	23.43%	20.38%	14.42%	16.91%	42.25%	28.46%	29.22%	25.81%	18.33%	20.14%	20.15%	15.79%
International Equities													
MSCI World Net Index (CAD)	5.82%	13.10%	8.36%	10.06%	11.03%	27.73%	21.04%	22.43%	19.12%	14.94%	13.68%	13.49%	9.96%
MSCI All Country World Index (CAD)	6.48%	14.46%	8.77%	12.23%	12.92%	31.07%	22.87%	23.41%	19.64%	14.97%	13.99%	13.44%	10.30%
MSCI All Country World Ex US Index (CAD)	6.38%	13.85%	4.01%	16.71%	15.21%	33.68%	24.18%	21.97%	17.91%	12.24%	10.93%	9.53%	7.54%
MSCI EAFE Net Index (CAD)	4.31%	9.32%	0.35%	11.32%	9.91%	23.03%	18.59%	18.68%	16.65%	11.68%	9.85%	9.37%	6.73%
MSCI Europe Net Index (CAD)	3.87%	8.49%	0.02%	9.66%	7.34%	20.18%	17.24%	18.17%	16.72%	11.89%	9.89%	9.20%	6.79%
MSCI Emerging Markets Net Index (CAD)	11.01%	24.20%	10.49%	27.84%	26.24%	54.60%	32.77%	25.71%	18.23%	10.40%	11.24%	7.73%	8.02%

Calendar Year Returns

31-May-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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