

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.

April 30, 2021

| Canadian Dollar (\$US/\$CA)81.40 | 2.36% | 4.03% | 3.64% | 13.23% | 4.53% | 1.47% | 2.69% | 0.43% | -2.55% | -0.61% | 1.12% | 0.41% |
|----------------------------------|--------|--------|--------|--------|---------|---------|--------|--------|--------|--------|--------|-------|
| Name | 1M | 3M | YTD | 1Y | 2Y | 3Y | 4Y | 5Y | 10Y | 15Y | 20Y | 25Y |
| Canada | | | | | | | | | | | | |
| Fixed Income | | | | | | | | | | | | |
| 91-Day T-Bills | 0.01% | 0.02% | 0.03% | 0.19% | 1.00% | 1.18% | 1.08% | 0.97% | 0.92% | - | - | - |
| FTSE TMX Short Term Bond | 0.18% | -0.53% | -0.40% | 1.61% | 2.95% | 3.23% | 2.20% | 2.12% | 2.41% | - | - | - |
| FTSE TMX Universe Bond | 0.06% | -3.92% | -4.98% | -2.03% | 3.11% | 4.09% | 2.81% | 2.86% | 3.90% | - | - | - |
| FTSE TMX High Yield Bond | 0.98% | 2.10% | 3.22% | 17.95% | 6.83% | 6.14% | 6.68% | 8.72% | 5.81% | - | - | - |
| Equities | | | | | | | | | | | | |
| S&P/TSX Composite | 2.39% | 10.99% | 10.63% | 33.31% | 10.80% | 10.40% | 8.53% | 9.78% | 6.36% | 6.12% | 7.30% | 8.00% |
| S&P/TSX SmallCap | 4.17% | 13.80% | 14.32% | 66.64% | 16.35% | 8.07% | 6.04% | 7.38% | 2.26% | 3.07% | 5.01% | - |
| S&P/TSX Composite Dividend | 2.40% | 12.53% | 11.75% | 31.47% | 8.79% | 9.05% | 7.40% | 9.15% | 6.76% | - | - | - |
| S&P/TSX Equity Income | 2.91% | 15.90% | 17.76% | 41.34% | 8.32% | 8.90% | 6.39% | 8.63% | 6.45% | 6.34% | - | - |
| S&P/TSX Preferred Share | 2.06% | 8.30% | 11.08% | 35.63% | 9.74% | 4.16% | 4.39% | 7.04% | 2.78% | 2.81% | - | - |
| S&P/TSX Sectors | | | | | | | | | | | | |
| Cdn. Energy | 1.03% | 31.61% | 30.47% | 58.05% | -10.99% | -12.89% | -8.93% | -5.94% | -7.42% | -4.24% | 2.71% | - |
| Cdn. Materials | 5.54% | 1.83% | -1.71% | 10.33% | 18.07% | 11.69% | 8.05% | 7.13% | -1.72% | 3.42% | 6.23% | - |
| Cdn. Industrials | -1.09% | 8.29% | 5.65% | 34.06% | 14.25% | 14.40% | 14.07% | 16.34% | 13.20% | 11.02% | 8.40% | - |
| Cdn. Consumer Discretionary | 5.15% | 21.63% | 18.52% | 74.17% | 17.59% | 11.60% | 10.79% | 12.89% | 13.44% | 8.96% | 8.22% | - |
| Cdn. Consumer Staples | -0.40% | 8.73% | 4.16% | 10.61% | 5.25% | 9.99% | 5.53% | 7.40% | 14.25% | 10.33% | 10.68% | - |
| Cdn. Health Care | -9.88% | -7.60% | 24.63% | 44.69% | -23.76% | -2.55% | 4.85% | -3.91% | 4.14% | 4.28% | 1.47% | - |
| Cdn. Financials | 3.01% | 17.42% | 17.31% | 48.53% | 11.26% | 10.61% | 9.90% | 11.65% | 10.30% | 8.21% | 10.43% | - |
| Cdn. Information Technology | 3.01% | 2.64% | 4.14% | 41.61% | 39.64% | 37.70% | 32.74% | 31.18% | 19.81% | 14.31% | 7.48% | - |
| Cdn. Telecommunication Services | 3.43% | 12.56% | 12.81% | 19.24% | 5.60% | 9.14% | 6.58% | 9.88% | 11.73% | 10.54% | 9.07% | - |
| Cdn. Utilities | -0.45% | 0.29% | 2.96% | 20.64% | 18.23% | 17.59% | 11.61% | 12.52% | 8.69% | 8.54% | 9.84% | - |
| Cdn. Real Estate | 4.44% | 13.09% | 14.84% | 34.56% | 5.46% | 9.07% | 7.93% | 8.58% | 9.66% | 8.56% | 11.14% | - |
| Global Gold | 3.49% | -2.10% | -5.77% | -8.32% | 28.67% | 17.55% | 10.36% | 6.29% | -2.02% | 0.19% | 5.66% | - |
| Global Mining | 5.03% | 7.82% | 6.78% | 35.99% | 24.09% | 17.95% | 16.27% | 15.09% | 1.13% | - | - | - |
| S&P/TSX Cdn. REIT | 4.64% | 13.96% | 14.31% | 27.05% | 4.41% | 8.55% | 7.88% | 8.13% | 7.62% | 8.05% | 10.72% | - |
| U.S. | | | | | | | | | | | | |
| S&P 500 (LargeCap) | 2.90% | 8.61% | 7.91% | 28.93% | 16.09% | 16.95% | 14.22% | 16.92% | 17.16% | 10.98% | 7.15% | 9.30% |
| Russell 2000 | -0.26% | 5.31% | 11.02% | 54.48% | 15.69% | 13.56% | 11.30% | 15.98% | 14.55% | 9.66% | 8.25% | 8.77% |
| Russell 2000 Growth | -0.18% | -1.72% | 3.40% | 49.39% | 18.55% | 16.26% | 14.54% | 18.38% | 15.82% | 10.91% | 7.96% | 7.54% |
| Russell 2000 Value | -0.33% | 12.90% | 19.28% | 58.05% | 11.69% | 10.06% | 7.48% | 13.06% | 12.99% | 8.17% | 8.18% | 9.51% |
| International & Other | | | | | | | | | | | | |
| London FTSE 100 (UK) | 1.96% | 6.61% | 6.66% | 18.27% | -0.89% | 0.10% | 2.12% | 4.67% | 6.07% | 3.57% | 3.17% | 5.27% |
| Frankfurt DAX 30 (Germany) | 0.99% | 7.35% | 4.73% | 35.29% | 9.78% | 4.60% | 4.85% | 9.17% | 7.78% | 6.67% | 4.93% | 6.94% |
| S&P/ASX 50 (Australia) | 2.07% | 4.34% | 4.67% | 33.14% | 8.30% | 8.57% | 5.71% | 9.54% | 7.19% | 7.20% | 9.02% | 8.48% |
| MSCI World (Net) | 2.24% | 6.62% | 5.95% | 28.35% | 13.00% | 12.45% | 10.90% | 13.55% | 12.80% | 7.99% | 5.69% | 6.90% |
| MSCI World ex-USA | 0.84% | 4.47% | 3.75% | 24.76% | 7.28% | 5.62% | 6.15% | 8.99% | 8.26% | 5.17% | 4.71% | 5.23% |
| MSCI Europe | 2.26% | 6.39% | 5.25% | 26.98% | 6.97% | 5.33% | 5.85% | 8.81% | 8.12% | 5.28% | 4.66% | 6.68% |
| MSCI Japan | -3.80% | -2.75% | -3.36% | 15.68% | 8.05% | 4.39% | 6.32% | 9.05% | 10.12% | 3.66% | 2.90% | 1.52% |
| MSCI EAFE (Net) | 0.63% | 3.57% | 2.85% | 23.54% | 6.54% | 4.73% | 5.44% | 8.41% | 7.98% | 4.62% | 4.09% | 4.62% |
| MSCI EM (Emerging Markets) | 0.14% | -2.18% | 1.22% | 31.78% | 9.84% | 6.34% | 8.39% | 12.43% | 6.68% | 6.64% | 9.03% | 6.30% |
| EM Latin America | 1.33% | 1.25% | -5.20% | 29.66% | -8.06% | -5.57% | -1.68% | 3.50% | -0.93% | 2.95% | 6.92% | 7.12% |
| EMU (European Monetary Union) | 2.32% | 7.61% | 5.85% | 34.83% | 8.17% | 4.87% | 6.11% | 9.87% | 7.96% | 4.95% | 4.28% | 6.64% |
| ACWI ex-USA | 0.63% | 2.34% | 2.96% | 26.79% | 8.10% | 5.92% | 6.78% | 9.87% | 7.97% | 5.46% | 5.25% | 5.47% |

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