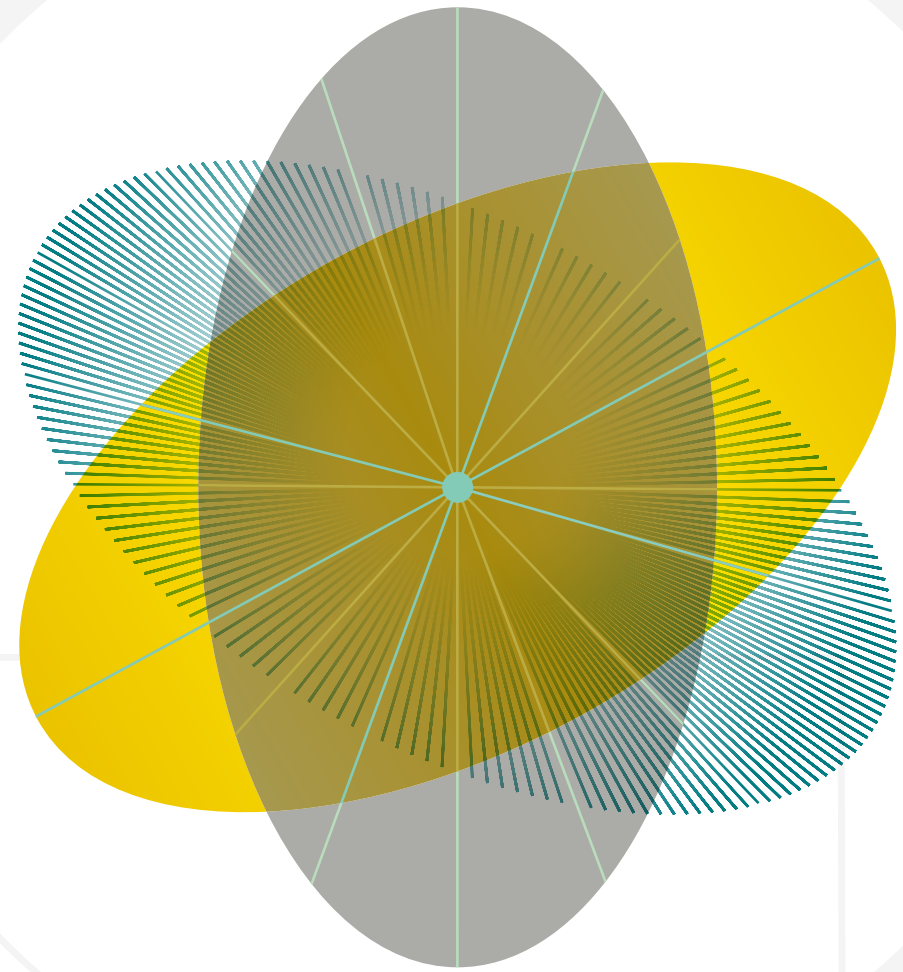
Dimensional



# MATRIX BOOK 2025

HISTORICAL RETURNS DATA—CANADA

## ON THE COVER

Investing in markets means investing in human ingenuity—the ability to develop new solutions and execute on the inspiration that drives companies and the people they serve forward.

THE POWER OF

# *Human Ingenuity*

By David Booth, Founder and Chairman

**Investing in the market means investing in people, their ideas, and their innovations.**

Employees at US public companies

**44,000,000+**

US trademarks filed

**597,658**

US patents filed

**160,133**

Data for 2024

> Anybody who knows me knows about my belief in the power of markets. This perspective is grounded in my belief in human ingenuity: our inherent drive to solve problems, to rise to the occasion in the face of uncertainty, to be helpful to one another, and in doing so, to make each other's lives better.

It's an unstoppable optimism that leads to innovation. Human ingenuity powers the market—the many thousands of companies around the world, employing millions of people, each finding new ways to move us forward. The stock market provides the best mechanism I know of to process information, set fair prices, and allow investors to benefit from society's collective endeavors.

The year 2020 was a particularly striking example of this. As COVID spread around the world, stocks crashed, with the S&P 500 falling 34% in less than five weeks. But businesses got to work: on treating the virus, serving people stuck at home, and eventually finding a vaccine. By the end of December the S&P 500 had recovered its losses and then some, up 18% for 2020, showing that markets can rise even through times of global distress.

**Opposite page:** Number of employees at public companies is calculated based on data provided by Morningstar, which is sourced from public companies and typically reported as of the latest fiscal year-end, and then limited to a list of US public companies generated by Dimensional Fund Advisors LP using data from Bloomberg and based on the investable universe of Dimensional products. Patents and trademarks data is for January 1, 2024, through December 31, 2024. Source: United States Patent and Trademark Office.

**Red Alert**

Many observers foresaw a negative year for stocks in 2024. But companies innovated, businesses launched new products, and markets defied predictions.

"The Stock Market Could Plunge as Much as 27% When the Economy Finally Tips into Recession, Investment Research Firm Says"

–Business Insider, November 28, 2023

"US Economist Predicts 2024 Will Bring 'Biggest Crash of Our Lifetime'"

–Fox Business, December 19, 2023

"Stock Market Forecast 2024: A Soft Landing May Not Bring the Gains You Expect"

–*Investor's Business Daily*, January 4, 2024

"Stock Markets Are Booming. But the Good Times Are Unlikely to Last."

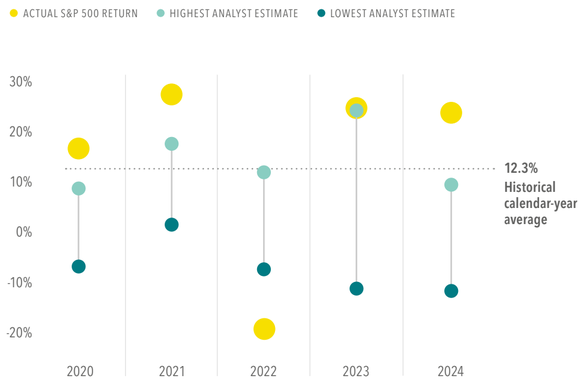
–*The Economist*, February 25, 2024

Last year served as a reminder, too. 2024 came against a backdrop of geopolitical tensions, economic uncertainty, and electoral anxiety in the US and elsewhere. Those concerns accompanied stubbornly high inflation, a shift in direction for interest rates, and the ripple effects from conflicts in Ukraine and the Middle East. Some observers speculated this could be the beginning of a prolonged economic downturn, worries that were reflected in predictions by many market watchers.

Despite bearish market forecasts for 2024, in the US, the S&P 500 returned a robust 25.0%. Alongside the gains in the US, the global stock market, as measured by the MSCI All Country World Index, was up 20.3%. Even bonds, after struggling earlier in the decade, delivered solid returns (4.2% as measured by the Bloomberg Global Aggregate Bond Index). Taken together, it was a reminder that markets can be hard to predict. Even when uncertainty abounds, markets price in expectations of future cash flows, driven by people and businesses that are constantly seeking to overcome challenges and create opportunities. Investors with broadly diversified portfolios who stuck with their plans were rewarded for their patience and discipline.

**Perseverance over Predictions**

Equity analyst predictions vs. actual S&P 500 Index calendar-year price returns




In USD. Source: Bloomberg, using the "Strategists S&P 500 Index Estimates for Year-End…." Analyst predictions for each year are as of December in the year prior. Analyst forecasts and returns are price returns. There were 21 predictions for 2020, 17 for 2021, 19 for 2022, 22 for 2023, and 19 for 2024. Price return represents the change in price of an investment and does not include dividends and other earnings. Historical calendar-year average calculated as the arithmetic average of calendar-year returns: 1927 to 2024 total returns of the S&P 500 Index. **Past performance is not a guarantee of future results.** Indices are not available for direct investment; therefore, their performance does not reflect the expenses associated with the management of an actual portfolio. S&P data © 2025 S&P Dow Jones Indices LLC, a division of S&P Global. All rights reserved.

Diversification does not eliminate the risk of market loss. Investing risks include the loss of principal and fluctuating value.

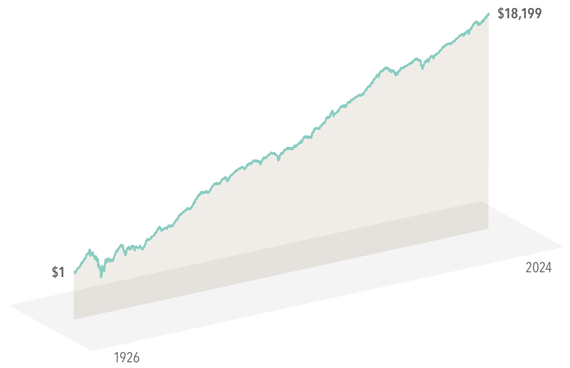
There are always plenty of surprises and fluctuations along the way. Individual stocks and sectors go up and down based on current events, earnings reports, and shifting consumer sentiment. But zoom out and the big picture becomes clear: over the past century, the US stock market has consistently risen, returning on average about 10% a year.[1] This is why I have unwavering faith in markets. By owning a broad slice of global markets, we can participate in the upside of human problem-solving and innovation as it takes place across a vast array of companies and the untold number of ideas their employees develop.

Whatever the difficulties, people find ways to adapt, create, and move forward. Markets reflect this reality, and investors harness the power of markets by staying disciplined, diversifying globally, minimizing costs, balancing risks, and pursuing higher expected returns. Those are timeless principles that don't depend on predictions or guesswork—they simply allow everyone to participate in the rewards of human creativity and resilience.

*By owning a broad slice of global markets, we can participate in the upside of human problem-solving and innovation.*

**The March of Progress**

S&P 500 Index (1926–2024)




In USD. Data presented is hypothetical and assumes reinvestment of income and no transaction costs or taxes. The chart is for illustrative purposes only and is not indicative of any investment. **Past performance is not a guarantee of future results.** Indices are not available for direct investment; therefore, their performance does not reflect the expenses associated with the management of an actual portfolio. S&P data © 2025 S&P Dow Jones Indices LLC, a division of S&P Global. All rights reserved.

It's also worth remembering that true wealth is about more than the balance in your investment account. It's about having the financial security and peace of mind to be able to focus on what matters most—your health, your relationships, your passions and purpose. It's about living a life of meaning and optimism, even when we're unsure about what lies ahead. And it's about trusting in the power of human ingenuity.

As we look forward, let's carry these lessons with us. Let's continue to invest in markets and in ourselves. Let's have faith in progress, even if the path isn't always smooth. Throughout history, we've faced countless challenges, yet we've always found a way to adjust and overcome. We've harnessed the power of technology, unlocked the secrets of science, and created societies that are more prosperous and more connected than ever before. And I believe this trend will continue. I believe in our ability to confront any obstacle as we build a better future. As long as people keep dreaming and solving problems, opportunities to grow and develop will be abundant—for ourselves and for generations to come.

*Human ingenuity powers the market—the many thousands of companies around the world, employing millions of people, each finding new ways to move us forward.*

1. Average annualized return for the S&P 500 is 10.4% (1926–2024) and does not account for inflation.
Source: S&P data © 2025 S&P Dow Jones Indices LLC, a division of S&P Global.

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# How to Use This Book

(A) Locate the column for the starting year.

(B) Locate the row for the ending year.

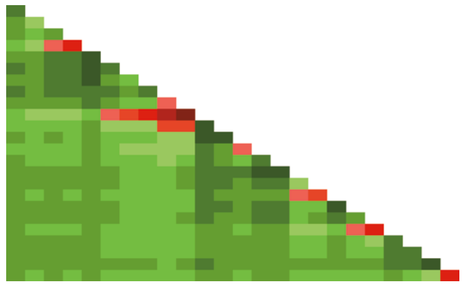
(C) The annualized return over that period is found where the row and column meet.

In this example, the matrix shows an annualized compound rate of return of 16.3% for the five-year period 2004–2008.

| | 2001 | | | 2004 | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2001 | 22.9 | 2002 | | | | | | | | | | | | | | | | | | | |
| 2002 | 13.5 | 4.9 | 2003 | | | | | | | | | | | | | | | | | | |
| 2003 | 13.9 | 9.7 | 14.7 | 2004 | | | | | | | | | | | | | | | | | |
| 2004 | 6.5 | 1.5 | -0.1 | -13.0 | 2005 | | | | | | | | | | | | | | | | |
| 2005 | 14.9 | 13.0 | 15.9 | 16.4 | 55.8 | 2006 | | | | | | | | | | | | | | | |
| 2006 | 16.1 | 14.8 | 17.4 | 18.3 | 38.0 | 22.2 | 2007 | | | | | | | | | | | | | | |
| 2007 | 14.8 | 13.5 | 15.4 | 15.5 | 26.9 | 14.6 | 7.4 | 2008 | | | | | | | | | | | | | |
| 2008 | 15.4 | 14.3 | 16.0 | 16.3 | 25.0 | 16.2 | 13.2 | 19.3 | 2009 | | | | | | | | | | | | |
| 2009 | 12.9 | 11.7 | 12.7 | 12.4 | 18.3 | 10.5 | 6.8 | 6.5 | -5.0 | 2010 | | | | | | | | | | | |
| 2010 | 6.6 | 5.0 | 5.0 | 3.6 | 6.7 | -1.1 | -6.2 | -10.3 | -22.2 | -36.3 | 2011 | | | | | | | | | | |
| 2011 | 9.2 | 8.0 | 8.3 | 7.5 | 10.8 | 4.7 | 1.5 | 0.1 | -5.6 | -5.9 | 39.0 | 2012 | | | | | | | | | |
| 2012 | 10.8 | 9.8 | 10.3 | 9.8 | 13.0 | 8.0 | 5.8 | 5.4 | 2.2 | 4.7 | 34.3 | 29.7 | 2013 | | | | | | | | |
| 2013 | 9.6 | 8.5 | 8.9 | 8.3 | 11.0 | 6.4 | 4.3 | 3.8 | 0.9 | 2.4 | 20.0 | 11.5 | -4.2 | 2014 | | | | | | | |
| 2014 | 10.2 | 9.3 | 9.7 | 9.2 | 11.7 | 7.7 | 6.0 | 5.8 | 3.6 | 5.5 | 19.6 | 13.8 | 6.6 | 18.6 | 2015 | | | | | | |
| 2015 | 12.2 | 11.5 | 12.0 | 11.8 | 14.4 | 10.9 | 9.7 | 10.0 | 8.7 | 11.2 | 24.3 | 20.9 | 18.0 | 31.0 | 44.8 | 2016 | | | | | |
| 2016 | 11.7 | 11.0 | 11.5 | 11.2 | 13.5 | 10.3 | 9.2 | 9.3 | 8.2 | 10.2 | 20.7 | 17.4 | 14.5 | 21.5 | 22.9 | 4.3 | 2017 | | | | |
| 2017 | 10.6 | 9.9 | 10.2 | 9.9 | 11.9 | 8.9 | 7.7 | 7.8 | 6.6 | 8.1 | 16.6 | 13.2 | 10.2 | 14.1 | 12.7 | -0.6 | -5.4 | 2018 | | | |
| 2018 | 11.5 | 10.8 | 11.2 | 11.0 | 12.9 | 10.2 | 9.2 | 9.4 | 8.4 | 10.0 | 17.8 | 15.1 | 12.8 | 16.5 | 16.0 | 7.8 | 9.5 | 26.8 | 2019 | | |
| 2019 | 11.6 | 11.0 | 11.3 | 11.1 | 13.0 | 10.4 | 9.5 | 9.7 | 8.9 | 10.4 | 17.3 | 14.8 | 12.9 | 16.0 | 15.5 | 9.1 | 10.8 | 19.8 | 13.3 | 2020 | |
| 2020 | 10.2 | 9.6 | 9.8 | 9.6 | 11.2 | 8.7 | 7.8 | 7.8 | 6.9 | 8.0 | 13.9 | 11.4 | 9.3 | 11.4 | 10.2 | 4.4 | 4.4 | 7.9 | -0.5 | -12.6 | 2021 |
| 2021 | 10.8 | 10.2 | 10.5 | 10.3 | 11.8 | 9.5 | 8.8 | 8.8 | 8.1 | 9.2 | 14.7 | 12.6 | 10.8 | 12.8 | 12.0 | 7.3 | 8.0 | 11.6 | 6.9 | 3.9 | 23.5 | 2022 | |
| 2022 | 11.0 | 10.5 | 10.8 | 10.5 | 12.0 | 9.9 | 9.1 | 9.3 | 8.6 | 9.7 | 14.8 | 12.8 | 11.2 | 13.1 | 12.4 | 8.4 | 9.1 | 12.3 | 8.9 | 7.5 | 19.3 | 15.2 | 2023 |
| 2023 | 11.6 | 11.1 | 11.5 | 11.3 | 12.7 | 10.7 | 10.1 | 10.3 | 9.7 | 10.8 | 15.6 | 13.9 | 12.5 | 14.4 | 13.9 | 10.5 | 11.4 | 14.5 | 12.2 | 12.0 | 21.6 | 20.7 | 26.4 | 2024 |
| 2024 | 10.4 | 9.9 | 10.2 | 9.9 | 11.2 | 9.3 | 8.6 | 8.7 | 8.0 | 9.0 | 13.2 | 11.5 | 10.0 | 11.4 | 10.8 | 7.5 | 7.9 | 10.0 | 7.4 | 6.2 | 11.5 | 7.8 | 4.3 | -13.9 |
| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |

The heat map shows annualized returns converted to shades of red and green based on positive and negative ranges. They are provided for matrices that date back to at least 1985.

- >25%
- >15% to 25%
- >10% to 15%
- >5% to 10%
- 0% to 5%
- <0% to −5%
- <−5% to −10%
- <−10% to −15%
- <−15% to −25%
- <−25%



If you are a retail investor, this document has been presented to you by your financial advisor, who can help explain its contents. **Past performance is not a guarantee of future results. Actual returns may be lower.** The Dimensional indices represent academic concepts that may be used in portfolio construction and are not available for direct investment or for use as a benchmark. Index returns are not representative of actual portfolios and do not reflect costs and fees associated with an actual investment. See Sources and Descriptions of Data for additional information, including descriptions of the Dimensional index data.

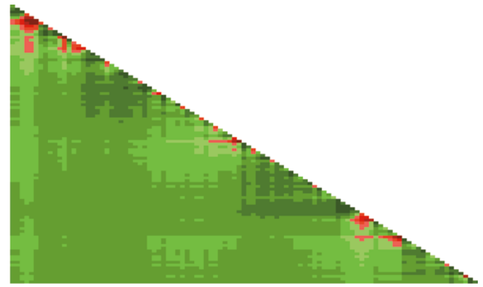


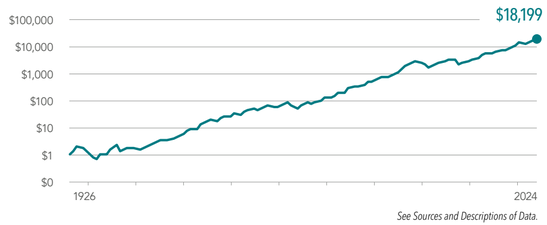
# Annualized Rates of Returns (%)

| | 1 Year 2024 | 5 Years 2020–2024 | 10 Years 2015–2024 | 15 Years 2010–2024 | 20 Years 2005–2024 | 50 Years 1975–2024 | 80 Years 1945–2024 |
|---|---|---|---|---|---|---|---|
| S&P 500 Index (in USD) | 25.0 | 14.5 | 13.1 | 13.9 | 10.4 | 12.4 | 11.5 |
| NASDAQ Composite Index (in USD) | 28.6 | 16.6 | 15.1 | 15.3 | 11.5 | 12.2 | — |
| Russell 3000 Index (in USD) | 23.8 | 13.9 | 12.5 | 13.6 | 10.2 | — | — |
| Dimensional US Small Cap Index (in USD) | 11.9 | 10.7 | 9.3 | 12.0 | 9.3 | 15.2 | 13.1 |
| Dimensional US Marketwide Value Index (in USD) | 13.4 | 9.2 | 9.0 | 11.3 | 7.9 | 14.1 | 13.1 |
| Dimensional US Small Cap Value Index (in USD) | 8.7 | 12.2 | 9.7 | 11.9 | 9.2 | 17.1 | 15.2 |
| S&P/TSX Composite Index (in CAD) | 21.7 | 11.1 | 8.7 | 8.3 | 8.1 | 10.3 | — |
| Dimensional Canada Small Index (in CAD) | 22.3 | 12.4 | 8.4 | 8.3 | 7.5 | — | — |
| MSCI EAFE Index (in CAD) | 13.8 | 7.4 | 8.0 | 8.0 | 6.3 | 10.5 | — |
| Fama/French Canada Value Index (in CAD) | 23.3 | 14.8 | 9.5 | 8.1 | 8.8 | — | — |
| Dimensional International Small Cap Index (in CAD) | 12.1 | 6.4 | 8.5 | 9.2 | 7.6 | 14.3 | — |
| Fama/French International Value Index (in CAD) | 16.2 | 9.2 | 8.4 | 8.2 | 7.1 | 13.5 | — |
| MSCI Emerging Markets Index (in CAD) | 17.9 | 4.2 | 6.3 | 5.6 | 7.4 | — | — |
| Dimensional Emerging Markets Small Index (in CAD) | 14.4 | 8.4 | 8.6 | 7.9 | 9.5 | — | — |
| MSCI World Index (in CAD) | 30.0 | 14.0 | 12.9 | 13.0 | 9.5 | 11.8 | — |
| Dimensional Emerging Markets Value Index (in CAD) | 17.6 | 8.3 | 8.0 | 6.4 | 9.2 | — | — |
| Dimensional Global Small Index (in CAD) | 18.2 | 10.6 | 10.5 | 12.0 | 9.2 | 15.2 | — |
| Dimensional Global Marketwide Value Index (in CAD) | 20.6 | 10.9 | 10.2 | 11.2 | 7.9 | — | — |
| S&P Global REIT Index (in CAD) | 13.3 | 3.6 | 6.4 | 9.7 | — | — | — |
| One-Month US Treasury Bills (in USD) | 5.4 | 2.4 | 1.7 | 1.2 | 1.6 | 4.3 | 3.8 |
| Dimensional US 20-Year Treasury Index (in USD) | −4.9 | −4.9 | −0.7 | 2.8 | 3.4 | 7.0 | 5.2 |
| FTSE Canada 30-Day Treasury Bills (in CAD) | 4.7 | 2.4 | 1.6 | 1.4 | 1.7 | 5.4 | — |
| FTSE Canada Short-Term Bond Index (in CAD) | 5.7 | 2.1 | 1.9 | 2.3 | 2.9 | — | — |
| FTSE Canada Long-Term Bond Index (in CAD) | 1.3 | −1.5 | 1.8 | 4.2 | 4.6 | 8.6 | — |
| FTSE Canada Universe Bond Index (in CAD) | 4.2 | 0.8 | 2.0 | 3.1 | 3.6 | — | — |
| FTSE World Government Bond Index 1–5 Years (Hedged to CAD) | 3.4 | 1.1 | 1.3 | 1.7 | 2.3 | — | — |
| Bloomberg Global Aggregate Bond Index (Hedged to CAD) | 2.4 | 0.0 | 1.6 | 2.9 | 3.2 | — | — |
| Inflation: Canadian Consumer Price Index | 1.8 | 3.4 | 2.6 | 2.3 | 2.1 | 3.6 | — |
| US Dollar vs. Canadian Dollar | 9.1 | 2.1 | 2.2 | 2.1 | 0.9 | 0.7 | — |
| S&P 500 Index (in CAD) (Inflation Adjusted) | 33.9 | 13.1 | 12.6 | 13.7 | 9.0 | 9.3 | — |
| S&P/TSX Composite Index (Inflation Adjusted) | 19.5 | 7.4 | 5.9 | 5.9 | 5.8 | 6.5 | — |
| MSCI EAFE Index (in CAD) (Inflation Adjusted) | 11.8 | 3.9 | 5.3 | 5.6 | 4.0 | 6.7 | — |
| FTSE Canada Universe Bond Index (in CAD) (Inflation Adjusted) | 2.4 | −2.5 | −0.6 | 0.8 | 1.5 | — | — |
| FTSE Canada 30-Day Treasury Bills (in CAD) (Inflation Adjusted) | 2.8 | −1.0 | −1.0 | −0.9 | −0.4 | 1.8 | — |

# S&P 500 Index

1926–2024 in USD



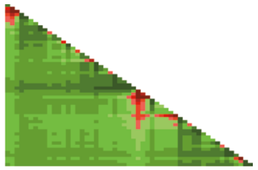


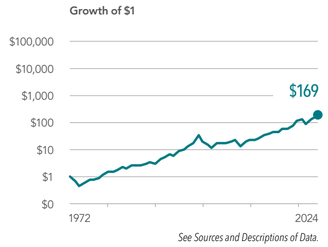

*See Sources and Descriptions of Data.*

| | 1926 | | |

# NASDAQ Composite Index

1972–2024 in USD



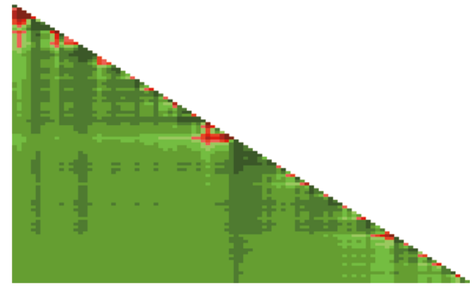


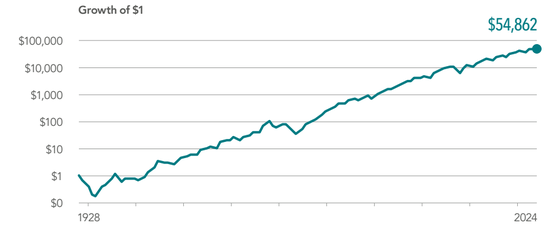

*See Sources and Descriptions of Data.*

| | 1972 | | |

# Dimensional US Small Cap Index

1928–2024 in USD



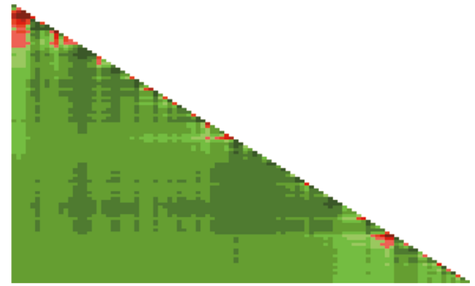


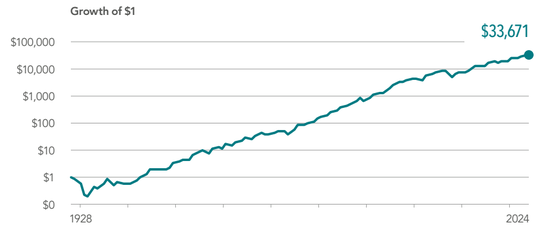

See Sources and Descriptions of Data.

| | 1928 | 1929 | 1930 | 1931 | 1932 | 1933 | 1934 | 1935 | 1936 | 1937 | 1938 | 1939 | 1940 | 1941 | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 | 1953 | 1954 | 1955 | 1956 | 1957 | 1958 | 1959 | 1960 | 1961 | 1962 | 1963 | 1964 | 1965 | 1966 | 1967 | 1968 | 1969 | 1970 | 1971 | 1972 | 1973 | 1974 | 1975 | 1976 | 1977 | 1978 | 1979 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---

# Dimensional US Marketwide Value Index

1928–2024 in USD



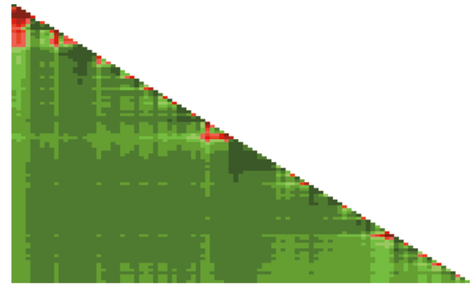


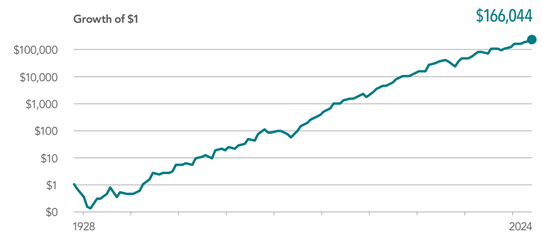

See Sources and Descriptions of Data.

| | 1928 | 1929 | 1930 | 1931 | 1932 | 1933 | 1934 | 1935 | 1936 | 1937 | 1938 | 1939 | 1940 | 1941 | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 | 1953 | 1954 | 1955 | 1956 | 1957 | 1958 | 1959 | 1960 | 1961 | 1962 | 1963 | 1964 | 1965 | 1966 | 1967 | 1968 | 1969 | 1970 | 1971 | 1972 | 1973 | 1974 | 1975 | 1976 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1928 | 24.9 | 1929 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1929 | 9.4 | -4.1 | 1930 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1930 | -8.5 | -21.6 | -36.0 | 1931 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1931 | -24.9 | -36.6 | -48.5 | -58.6 | 1932 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1932 | -22.3 | -31.0 | -38.2 | -39.3 | -11.1 | 1933 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1933 | -9.0 | -14.5 | -17.0 | -9.5 | 33.9 | 101.6 | 1934 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1934 | -8.7 | -13.3 | -15.0 | -8.8 | 18.6 | 37.0 | -6.9 | 1935 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1935 | -3.2 | -6.7 | -7.1 | 0.1 | 24.8 | 39.7 | 16.3 | 45.3 | 1936 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1936 | 1.7 | -0.8 | -0.3 | 7.3 | 29.8 | 42.6 | 27.1 | 48.5 | 51.7 | 1937 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1937 | -3.3 | -6.0 | -6.3 | -1.1 | 14.4 | 20.3 | 5.8 | 10.3 | -3.8 | -39.1 | 1938 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1938 | -1.4 | -3.7 | -3.7 | 1.4 | 15.2 | 20.3 | 8.5 | 12.7 | 3.6 | -14.4 | 20.3 | 1939 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1939 | -1.7 | -3.8 | -3.8 | 0.6 | 12.4 | 16.3 | 6.1 | 8.9 | 1.3 | -11.5 | 6.7 | -5.4 | 1940 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1940 | -2.0 | -3.9 | -3.9 | 0.1 | 10.4 | 13.4 | 4.4 | 6.4 | 0.0 | -9.9 | 2.7 | -5.1 | -4.9 | 1941 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1941 | -2.0 | -3.8 | -3.8 | -0.1 | 9.0 | 11.5 | 3.6 | 5.2 | -0.3 | -8.4 | 1.5 | -4.1 | -3.5 | -2.0 | 1942 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1942 | -0.4 | -2.0 | -1.8 | 1.7 | 10.4 | 12.8 | 5.7 | 7.4 | 2.9 | -3.6 | 5.7 | 2.4 | 5.1 | 10.5 | 24.5 | 1943 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1943 | 1.6 | 0.3 | 0.6 | 4.1 | 12.4 | 14.9 | 8.6 | 10.5 | 6.7 | 1.5 | 10.5 | 8.7 | 12.5 | 19.0 | 31.1 | 38.0 | 1944 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1944 | 3.3 | 2.1 | 2.5 | 6.0 | 14.0 | 16.4 | 10.7 | 12.6 | 9.5 | 5.1 | 13.6 | 12.5 | 16.5 | 22.6 | 32.1 | 36.0 | 34.1 | 1945 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1945 | 5.4 | 4.3 | 4.9 | 8.4 | 16.1 | 18.5 | 13.4 | 15.4 | 12.8 | 9.1 | 17.4 | 17.0 | 21.2 | 27.2 | 35.8 | 39.7 | 40.6 | 47.4 | 1946 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1946 | 4.7 | 3.6 | 4.1 | 7.3 | 14.4 | 16.4 | 11.6 | 13.3 | 10.8 | 7.4 | 14.3 | 13.6 | 16.6 | 20.6 | 25.8 | 26.1 | 22.4 | 16.9 | -7.3 | 1947 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1947 | 4.8 | 3.8 | 4.3 | 7.3 | 13.9 | 15.8 | 11.3 | 12.8 | 10.5 | 7.4 | 13.6 | 12.9 | 15.4 | 18.6 | 22.5 | 22.1 | 18.4 | 13.6 | -0.3 | 7.3 | 1948 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1948 | 4.6 | 3.6 | 4.1 | 6.9 | 13.0 | 14.8 | 10.5 | 11.9 | 9.7 | 6.7 | 12.3 | 11.5 | 13.6 | 16.2 | 19.0 | 18.1 | 14.5 | 10.1 | -0.1 | 3.7 | 0.2 | 1949 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1949 | 5.0 | 4.2 | 4.6 | 7.3 | 13.2 | 14.8 | 10.8 | 12.1 | 10.1 | 7.4 | 12.6 | 11.9 | 13.8 | 16.1 | 18.5 | 17.7 | 14.6 | 11.1 | 3.5 | 7.4 | 7.4 | 15.2 | 1950 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1950 | 6.6 | 5.9 | 6.4 | 9.1 | 14.8 | 16.4 | 12.7 | 14.1 | 12.3 | 9.9 | 15.0 | 14.5 | 16.6 | 19.0 | 21.5 | 21.2 | 18.9 | 16.6 | 11.2 | 16.5 | 19.7 | 30.8 | 48.5 | 1951 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1951 | 7.0 | 6.3 | 6.8 | 9.4 | 14.8 | 16.4 | 12.9 | 14.2 | 12.5 | 10.2 | 15.0 | 14.6 | 16.5 | 18.6 | 20.9 | 20.5 | 18.5 | 16.4 | 11.9 | 16.2 | 18.6 | 25.5 | 30.9 | 15.4 | 1952 | | | | | | | | | | | | | | | | | | | | | | | |
| 1952 | 7.2 | 6.6 | 7.1 | 9.6 | 14.8 | 16.3 | 12.9 | 14.1 | 12.5 | 10.5 | 14.9 | 14.6 | 16.2 | 18.2 | 20.2 | 19.8 | 18.0 | 16.1 | 12.2 | 15.8 | 17.6 | 22.4 | 24.9 | 14.6 | 13.8 | 1953 | | | | | | | | | | | | | | | | | | | | | | | |
| 1953 | 6.7 | 6.0 | 6.5 | 8.8 | 13.7 | 15.1 | 11.9 | 13.0 | 11.4 | 9.4 | 13.5 | 13.0 | 14.5 | 16.1 | 17.8 | 17.2 | 15.3 | 13.3 | 9.7 | 12.4 | 13.2 | 16.0 | 16.2 | 7.1 | 3.2 | -6.4 | 1954 | | | | | | | | | | | | | | | | | | | | | | |
| 1954 | 8.4 | 7.8 | 8.3 | 10.7 | 15.5 | 16.9 | 13.9 | 15.1 | 13.7 | 11.9 | 15.9 | 15.7 | 17.2 | 19.0 | 20.8 | 20.5 | 19.0 | 17.6 | 14.7 | 17.8 | 19.4 | 22.9 | 24.5 | 19.1 | 20.4 | 23.9 | 63.8 | 1955 | | | | | | | | | | | | | | | | | | | | | |
| 1955 | 8.9 | 8.3 | 8.8 | 11.2 | 15.8 | 17.2 | 14.3 | 15.4 | 14.1 | 12.4 | 16.3 | 16.1 | 17.6 | 19.3 | 20.9 | 20.7 | 19.3 | 18.1 | 15.5 | 18.3 | 19.8 | 22.9 | 24.2 | 19.9 | 21.0 | 23.6 | 41.9 | 23.0 | 1956 | | | | | | | | | | | | | | | | | | | | |
| 1956 | 8.8 | 8.3 | 8.8 | 11.0 | 15.5 | 16.8 | 14.0 | 15.1 | 13.8 | 12.2 | 15.8 | 15.6 | 17.0 | 18.5 | 20.0 | 19.7 | 18.4 | 17.2 | 14.7 | 17.2 | 18.4 | 20.9 | 21.7 | 17.7 | 18.2 | 19.3 | 29.4 | 15.0 | 7.5 | 1957 | | | | | | | | | | | | | | | | | | | |
| 1957 | 7.9 | 7.3 | 7.7 | 9.8 | 14.0 | 15.2 | 12.5 | 13.4 | 12.2 | 10.6 | 13.9 | 13.6 | 14.8 | 16.0 | 17.3 | 16.8 | 15.4 | 14.1 | 11.7 | 13.6 | 14.2 | 15.9 | 16.0 | 12.0 | 11.4 | 11.0 | 15.8 | 3.1 | -5.6 | -17.0 | 1958 | | | | | | | | | | | | | | | | | | | |
| 1958 | 9.1 | 8.6 | 9.0 | 11.1 | 15.3 | 16.4 | 13.9 | 14.9 | 13.7 | 12.2 | 15.5 | 15.3 | 16.5 | 17.8 | 19.1 | 18.8 | 17.6 | 16.5 | 14.4 | 16.4 | 17.3 | 19.2 | 19.6 | 16.4 | 16.6 | 17.1 | 22.4 | 13.8 | 10.9 | 12.7 | 53.0 | 1959 | | | | | | | | | | | | | | | | | | |
| 1959 | 9.2 | 8.7 | 9.1 | 11.2 | 15.1 | 16.3 | 13.8 | 14.7 | 13.6 | 12.2 | 15.4 | 15.1 | 16.3 | 17.5 | 18.7 | 18.4 | 17.2 | 16.2 | 14.2 | 16.1 | 16.8 | 18.5 | 18.8 | 15.9 | 16.0 | 16.3 | 20.5 | 13.4 | 11.1 | 12.3 | 30.7 | 11.7 | 1960 | | | | | | | | | | | | | | | | | | |
| 1960 | 8.6 | 8.2 | 8.6 | 10.5 | 14.3 | 15.4 | 13.0 | 13.8 | 12.7 | 11.3 | 14.3 | 14.0 | 15.1 | 16.2 | 17.2 | 16.8 | 15.7 | 14.6 | 12.7 | 14.3 | 14.8 | 16.1 | 16.2 | 13.4 | 13.2 | 13.1 | 16.2 | 9.8 | 7.3 | 7.3 | 16.8 | 2.1 | -6.6 | 1961 | | | | | | | | | | | | | | | | | | |
| 1961 | 9.2 | 8.7 | 9.2 | 11.1 | 14.8 | 15.8 | 13.5 | 14.3 | 13.3 | 12.0 | 14.9 | 14.6 | 15.6 | 16.7 | 17.7 | 17.4 | 16.3 | 15.4 | 13.6 | 15.2 | 15.8 | 17.0 | 17.2 | 14.7 | 14.6 | 14.7 | 17.7 | 12.2 | 10.6 | 11.2 | 19.6 | 10.2 | 9.5 | 28.3 | 1962 | | | | | | | | | | | | | | | | | |
| 1962 | 8.7 | 8.3 | 8.7 | 10.5 | 14.0 | 15.0 | 12.8 | 13.6 | 12.5 | 11.3 | 14.0 | 13.7 | 14.6 | 15.6 | 16.5 | 16.1 | 15.1 | 14.1 | 12.4 | 13.8 | 14.2 | 15.3 | 15.3 | 12.9 | 12.6 | 12.5 | 14.9 | 9.9 | 8.1 | 8.2 | 14.1 | 6.1 | 4.3 | 10.1 | -5.5 | 1963 | | | | | | | | | | | | | | | | |
| 1963 | 9.2 | 8.7 | 9.1 | 10.9 | 14.4 | 15.3 | 13.2 | 14.0 | 13.0 | 11.7 | 14.4 | 14.2 | 15.0 | 16.0 | 16.9 | 16.5 | 15.6 | 14.7 | 13.1 | 14.4 | 14.9 | 15.9 | 16.0 | 13.8 | 13.7 | 13.6 | 15.9 | 11.5 | 10.1 | 10.5 | 15.9 | 9.7 | 9.2 | 15.0 | 8.9 | 25.4 | 1964 | | | | | | | | | | | | | | | |
| 1964 | 9.4 | 9.0 | 9.4 | 11.2 | 14.5 | 15.5 | 13.4 | 14.1 | 13.2 | 12.0 | 14.6 | 14.4 | 15.2 | 16.2 | 17.0 | 16.7 | 15.8 | 14.9 | 13.4 | 14.7 | 15.1 | 16.2 | 16.2 | 14.2 | 14.1 | 14.1 | 16.2 | 12.3 | 11.2 | 11.6 | 16.5 | 11.3 | 11.2 | 16.2 | 12.4 | 22.5 | 19.6 | 1965 | | | | | | | | | | | | | |
| 1965 | 9.8 | 9.4 | 9.8 | 11.5 | 14.8 | 15.7 | 13.7 | 14.4 | 13.5 | 12.4 | 14.8 | 14.7 | 15.5 | 16.4 | 17.2 | 16.9 | 16.1 | 15.3 | 13.9 | 15.1 | 15.5 | 16.5 | 16.6 | 14.7 | 14.7 | 14.8 | 16.7 | 13.2 | 12.2 | 12.8 | 17.2 | 12.8 | 13.0 | 17.4 | 14.8 | 22.5 | 21.1 | 22.5 | 1966 | | | | | | | | | |
| 1966 | 9.3 | 8.9 | 9.3 | 10.9 | 14.1 | 14.9 | 13.0 | 13.7 | 12.8 | 11.7 | 14.0 | 13.8 | 14.6 | 15.4 | 16.2 | 15.9 | 15.0 | 14.2 | 12.8 | 13.9 | 14.3 | 15.1 | 15.1 | 13.3 | 13.2 | 13.1 | 14.8 | 11.4 | 10.4 | 10.7 | 14.3 | 10.2 | 10.0 | 13.1 | 10.3 | 14.6 | 11.2 | 7.2 | -6.2 | 1967 | | | | | | | |
| 1967 | 9.9 | 9.5 | 9.9 | 11.5 | 14.6 | 15.4 | 13.6 | 14.2 | 13.4 | 12.3 | 14.6 | 14.4 | 15.2 | 16.0 | 16.8 | 16.5 | 15.7 | 14.9 | 13.7 | 14.8 | 15.2 | 16.0 | 16.0 | 14.4 | 14.3 | 14.3 | 16.0 | 12.9 | 12.1 | 12.6 | 16.1 | 12.6 | 12.7 | 15.7 | 13.8 | 18.1 | 16.3 | 15.2 | 11.7 | 33.1 | 1968 | | | | | | |
| 1968 | 10.2 | 9.9 | 10.3 | 11.8 | 14.9 | 15.7 | 13.9 | 14.6 | 13.7 | 12.7 | 15.0 | 14.8 | 15.6 | 16.4 | 17.1 | 16.9 | 16.1 | 15.4 | 14.2 | 15.2 | 15.6 | 16.5 | 16.5 | 15.0 | 15.0 | 15.0 | 16.6 | 13.8 | 13.1 | 13.6 | 16.9 | 13.8 | 14.1 | 17.0 | 15.4 | 19.3 | 18.1 | 17.8 | 16.2 | 29.4 | 25.9 | 1969 | | | | |
| 1969 | 9.4 | 9.1 | 9.4 | 10.9 | 13.9 | 14.6 | 12.8 | 13.5 | 12.6 | 11.6 | 13.7 | 13.5 | 14.2 | 15.0 | 15.6 | 15.3 | 14.5 | 13.8 | 12.6 | 13.5 | 13.8 | 14.5 | 14.5 | 12.9 | 12.8 | 12.7 | 14.0 | 11.3 | 10.5 | 10.8 | 13.5 | 10.4 | 10.3 | 12.3 | 10.5 | 13.0 | 11.0 | 9.4 | 6.3 | 10.9 | 1.2 | -18.6 | 1970 | | | |
| 1970 | 9.4 | 9.1 | 9.4 | 10.9 | 13.8 | 14.5 | 12.8 | 13.4 | 12.6 | 11.6 | 13.6 | 13.4 | 14.1 | 14.8 | 15.4 | 15.1 | 14.4 | 13.7 | 12.5 | 13.4 | 13.7 | 14.3 | 14.3 | 12.8 | 12.6 | 12.6 | 13.8 | 11.2 | 10.5 | 10.7 | 13.2 | 10.4 | 10.3 | 12.1 | 10.5 | 12.7 | 10.9 | 9.6 | 7.1 | 10.8 | 4.2 | -5.2 | 10.4 | 1971 | | |
| 1971 | 9.5 | 9.2 | 9.5 | 11.0 | 13.8 | 14.5 | 12.8 | 13.4 | 12.6 | 11.6 | 13.6 | 13.4 | 14.1 | 14.8 | 15.4 | 15.1 | 14.3 | 13.6 | 12.5 | 13.4 | 13.7 | 14.3 | 14.2 | 12.8 | 12.7 | 12.6 | 13.8 | 11.4 | 10.7 | 10.9 | 13.2 | 10.6 | 10.6 | 12.3 | 10.8 | 12.7 | 11.2 | 10.1 | 8.2 | 11.3 | 6.4 | 0.6 | 11.9 | 13.4 | 1972 | | |
| 1972 | 9.7 | 9.4 | 9.7 | 11.1 | 13.8 | 14.5 | 12.9 | 13.4 | 12.7 | 11.8 | 13.7 | 13.5 | 14.1 | 14.8 | 15.4 | 15.1 | 14.4 | 13.7 | 12.6 | 13.5 | 13.8 | 14.4 | 14.3 | 13.0 | 12.9 | 12.8 | 13.9 | 11.6 | 11.0 | 11.2 | 13.4 | 11.0 | 11.0 | 12.6 | 11.3 | 13.1 | 11.8 | 10.8 | 9.3 | 12.1 | 8.3 | 4.3 | 13.3 | 14.8 | 16.2 | 1973 | |
| 1973 | 9.2 | 8.9 | 9.2 | 10.5 | 13.1 | 13.8 | 12.2 | 12.7 | 12.0 | 11.1 | 12.9 | 12.7 | 13.3 | 13.9 | 14.5 | 14.1 | 13.4 | 12.8 | 11.7 | 12.5 | 12.7 | 13.2 | 13.1 | 11.8 | 11.6 | 11.5 | 12.5 | 10.3 | 9.6 | 9.8 | 11.7 | 9.4 | 9.2 | 10.6 | 9.2 | 10.6 | 9.2 | 8.2 | 6.5 | 8.4 | 4.8 | 1.0 | 6.6 | 5.4 | 1.6 | -11.2 | 1974 | |
| 1974 | 8.5 | 8.2 | 8.5 | 9.8 | 12.3 | 12.9 | 11.3 | 11.8 | 11.1 | 10.2 | 11.9 | 11.7 | 12.3 | 12.8 | 13.3 | 13.0 | 12.2 | 11.6 | 10.5 | 11.2 | 11.3 | 11.8 | 11.7 | 10.3 | 10.1 | 10.0 | 10.8 | 8.7 | 8.0 | 8.0 | 9.7 | 7.4 | 7.1 | 8.2 | 6.8 | 7.9 | 6.4 | 5.1 | 3.4 | 4.6 | 1.1 | -2.5 | 1.1 | -1.1 | -5.6 | -14.9 | -18.4 | 1975 | |
| 1975 | 9.2 | 8.9 | 9.2 | 10.5 | 13.0 | 13.6 | 12.1 | 12.6 | 11.9 | 11.0 | 12.8 | 12.6 | 13.1 | 13.7 | 14.2 | 13.9 | 13.2 | 12.6 | 11.6 | 12.3 | 12.5 | 13.0 | 12.9 | 11.6 | 11.5 | 11.4 | 12.3 | 10.3 | 9.7 | 9.8 | 11.5 | 9.4 | 9.3 | 10.5 | 9.3 | 10.5 | 9.3 | 8.5 | 7.1 | 8.7 | 6.0 | 3.5 | 7.7 | 7.2 | 5.6 | 2.3 | 9.9 | 47.9 | 1976 |
| 1976 | 9.8 | 9.5 | 9.9 | 11.2 | 13.6 | 14.3 | 12.8 | 13.3 | 12.6 | 11.7 | 13.5 | 13.3 | 13.9 | 14.4 | 15.0 | 14.7 | 14.0 | 13.5 | 12.5 | 13.2 | 13.5 | 14.0 | 13.9 | 12.8 | 12.7 | 12.6 | 13.5 | 11.6 | 11.1 | 11.3 | 13.0 | 11.2 | 11.1 | 12.5 | 11.3 | 13.2 | 11.9 | 11.2 | 9.6 | 11.2 | 7.6 | 5.3 | 10.2 | 9.8 | 7.9 | 12.3 | 12.7 | 12.5 | 11.6 | 20.5 | 46.4 | 44.8 | 1977 | | | | | | | |
| 1977 | 9.7 | 9.4 | 9.7 | 11.0 | 13.4 | 14.0 | 12.5 | 13.0 | 12.3 | 11.5 | 13.2 | 13.0 | 13.6 | 14.1 | 14.6 | 14.3 | 13.7 | 13.1 | 12.2 | 12.9 | 13.1 | 13.6 | 13.5 | 12.4 | 12.3 | 12.2 | 13.1 | 11.3 | 10.7 | 10.9 | 12.5 | 10.7 | 10.7 | 11.8 | 10.8 | 12.0 | 11.1 | 10.5 | 9.5 | 11.1 | 9.1 | 7.4 | 11.2 | 11.3 | 10.9 | 9.9 | 15.9 | 30.2 | 22.2 | 3.1 | 1978 | | | | | | | |
| 1978 | 9.7 | 9.4 | 9.7 | 11.0 | 13.3 | 13.9 | 12.5 | 13.0 | 12.3 | 11.5 | 13.2 | 13.0 | 13.5 | 14.0 | 14.5 | 14.2 | 13.6 | 13.1 | 12.2 | 12.8 | 13.0 | 13.5 | 13.4 | 12.3 | 12.2 | 12.1 | 13.0 | 11.2 | 10.7 | 10.9 | 12.4 | 10.7 | 10.7 | 11.7 | 10.8 | 11.9 | 11.0 | 10.5 | 9.6 | 11.0 | 9.1 | 7.4 | 11.2 | 11.3 | 10.9 | 9.9 | 14.7 | 24.9 | 18.1 | 6.7 | 10.3 | 1979 | | | | | | |
| 1979 | 10.0 | 9.7 | 10.0 | 11.3 | 13.6 | 14.2 | 12.8 | 13.3 | 12.6 | 11.8 | 13.5 | 13.3 | 13.8 | 14.3 | 14.8 | 14.6 | 14.0 | 13.4 | 12.6 | 13.2 | 13.4 | 13.9 | 13.8 | 12.8 | 12.7 | 12.7 | 13.5 | 11.8 | 11.4 | 11.5 | 13.1 | 11.4 | 11.4 | 12.5 | 11.6 | 12.7 | 12.0 | 11.5 | 10.8 | 12.2 | 10.6 | 9.3 | 12.6 | 12.8 | 12.7 | 12.2 | 16.7 | 25.4 | 20.3 | 13.1 | 18.4 | 27.1 | 1980 | | | | | | |
| 1980 | 10.3 | 10.0 | 10.3 | 11.5 | 13.8 | 14.4 | 13.0 | 13.5 | 12.8 | 12.1 | 13.7 | 13.5 | 14.0 | 14.6 | 15.0 | 14.8 | 14.2 | 13.7 | 12.9 | 13.5 | 13.7 | 14.2 | 14.1 | 13.1 | 13.0 | 13.0 | 13.8 | 12.2 | 11.8 | 12.0 | 13.5 | 11.9 | 12.0 | 13.0 | 12.2 | 13.3 | 12.6 | 12.2 | 11.5 | 12.9 | 11.5 | 10.4 | 13.5 | 13.8 | 13.9 | 13.6 | 17.6 | 25.0 | 20.9 | 15.6 | 20.0 | 25.2 | 23.3 | 1981 | | | | | | |
| 1981 | 10.2 | 10.0 | 10.3 | 11.4 | 13.7 | 14.2 | 12.9 | 13.4 | 12.7 | 12.0 | 13.6 | 13.4 | 13.9 | 14.4 | 14.9 | 14.6 | 14.1 | 13.6 | 12.7 | 13.4 | 13.6 | 14.0 | 14.0 | 13.0 | 12.9 | 12.9 | 13.6 | 12.1 | 11.7 | 11.9 | 13.3 | 11.8 | 11.8 | 12.8 | 12.0 | 13.1 | 12.4 | 12.0 | 11.4 | 12.6 | 11.3 | 10.3 | 13.1 | 13.3 | 13.3 | 13.0 | 16.5 | 22.5 | 18.8 | 14.1 | 17.1 | 19.4 | 15.8 | 8.7 | 1982 | | | | | | |
| 1982 | 10.4 | 10.2 | 10.5 | 11.6 | 13.8 | 14.4 | 13.1 | 13.5 | 12.9 | 12.2 | 13.7 | 13.6 | 14.1 | 14.6 | 15.0 | 14.8 | 14.2 | 13.8 | 13.0 | 13.6 | 13.8 | 14.2 | 14.2 | 13.2 | 13.2 | 13.1 | 13.9 | 12.4 | 12.0 | 12.2 | 13.6 | 12.2 | 12.2 | 13.2 | 12.5 | 13.5 | 12.9 | 12.5 | 11.9 | 13.2 | 12.0 | 11.0 | 13.7 | 14.0 | 14.0 | 13.8 | 17.0 | 22.4 | 19.1 | 15.3 | 17.9 | 19.9 | 17.6 | 14.9 | 21.4 | 1983 | | | | | | |
| 1983 | 10.8 | 10.6 | 10.8 | 12.0 | 14.2 | 14.7 | 13.4 | 13.9 | 13.3 | 12.6 | 14.1 | 14.0 | 14.5 | 15.0 | 15.4 | 15.2 | 14.7 | 14.2 | 13.5 | 14.1 | 14.3 | 14.7 | 14.7 | 13.8 | 13.7 | 13.7 | 14.5 | 13.1 | 12.7 | 12.9 | 14.3 | 13.0 | 13.0 | 14.0 | 13.3 | 14.3 | 13.8 | 13.5 | 13.0 | 14.3 | 13.2 | 12.4 | 15.0 | 15.4 | 15.5 | 15.5 | 18.5 | 23.6 | 20.8 | 17.7 | 20.4 | 22.5 | 21.3 | 20.7 | 27.2 | 33.2 | 1984 | | | | | | |
| 1984 | 10.8 | 10.6 | 10.9 | 12.0 | 14.1 | 14.7 | 13.4 | 13.8 | 13.3 | 12.6 | 14.1 | 13.9 | 14.4 | 14.9 | 15.3 | 15.1 | 14.6 | 14.2 | 13.4 | 14.0 | 14.2 | 14.6 | 14.6 | 13.7 | 13.7 | 13.7 | 14.4 | 13.0 | 12.7 | 12.9 | 14.2 | 12.9 | 13.0 | 13.9 | 13.3 | 14.2 | 13.7 | 13.4 | 12.9 | 14.1 | 13.1 | 12.3 | 14.8 | 15.1 | 15.2 | 15.2 | 17.9 | 22.3 | 19.8 | 17.0 | 19.1 | 20.6 | 19.3 | 18.4 | 21.8 | 22.0 | 11.7 | 1985 | | | | | | |
| 1985 | 11.1 | 10.9 | 11.2 | 12.3 | 14.4 | 14.9 | 13.7 | 14.1 | 13.6 | 12.9 | 14.4 | 14.3 | 14.7 | 15.2 | 15.6 | 15.4 | 14.9 | 14.5 | 13.8 | 14.4 | 14.6 | 15.0 | 15.0 | 14.2 | 14.1 | 14.1 | 14.8 | 13.5 | 13.2 | 13.4 | 14.7 | 13.5 | 13.6 | 14.5 | 13.9 | 14.8 | 14.4 | 14.1 | 13.7 | 14.9 | 14.0 | 13.3 | 15.7 | 16.0 | 16.2 | 16.2 | 18.8 | 23.0 | 20.7 | 18.3 | 20.3 | 21.8 | 21.0 | 20.5 | 23.7 | 24.4 | 20.3 | 29.5 | 1986 | | | | | | |
| 1986 | 11.2 | 11.0 | 11.3 | 12.4 | 14.5 | 15.0 | 13.8 | 14.2 | 13.7 | 13.0 | 14.5 | 14.3 | 14.8 | 15.3 | 15.7 | 15.5 | 15.0 | 14.6 | 13.9 | 14.5 | 14.7 | 15.1 | 15.1 | 14.3 | 14.2 | 14.2 | 14.9 | 13.7 | 13.4 | 13.6 | 14.8 | 13.7 | 13.7 | 14.6 | 14.1 | 15.0 | 14.5 | 14.3 | 13.9 | 15.1 | 14.2 | 13.6 | 16.3 | 16.3 | 16.8 | 16.8 | 18.8 | 22.6 | 20.5 | 18.3 | 20.1 | 21.4 | 20.6 | 20.1 | 22.6 | 22.9 | 19.6 | 23.8 | 18.3 | 1987 | | | | | |
| 1987 | 11.1 | 10.9 | 11.2 | 12.3 | 14.3 | 14.8 | 13.6 | 14.0 | 13.5 | 12.9 | 14.3 | 14.1 | 14.6 | 15.0 | 15.4 | 15.2 | 14.8 | 14.4 | 13.7 | 14.2 | 14.4 | 14.8 | 14.8 | 14.0 | 14.0 | 14.0 | 14.6 | 13.4 | 13.1 | 13.3 | 14.5 | 13.3 | 13.4 | 14.2 | 13.7 | 14.6 | 14.1 | 13.9 | 13.5 | 14.5 | 13.7 | 13.1 | 15.2 | 15.5 | 15.6 | 15.5 | 17.7 | 21.1 | 19.1 | 17.0 | 18.5 | 19.4 | 18.5 | 17.8 | 19.4 | 19.0 | 15.7 | 17.1 | 11.4 | 4.9 | 1988 | | | | | |
| 1988 | 11.4 | 11.2 | 11.4 | 12.5 | 14.5 | 15.0 | 13.8 | 14.3 | 13.8 | 13.1 | 14.5 | 14.4 | 14.8 | 15.3 | 15.7 | 15.5 | 15.0 | 14.6 | 14.0 | 14.5 | 14.7 | 15.1 | 15.1 | 14.3 | 14.3 | 14.3 | 15.0 | 13.8 | 13.5 | 13.7 | 14.9 | 13.8 | 13.9 | 14.7 | 14.2 | 15.0 | 14.6 | 14.4 | 14.1 | 15.1 | 14.3 | 13.8 | 15.8 | 16.1 | 16.3 | 16.3 | 18.4 | 21.5 | 19.7 | 17.8 | 19.3 | 20.2 | 19.5 | 19.0 | 20.6 | 20.4 | 18.0 | 19.6 | 16.5 | 15.7 | 27.6 | 1989 | | | | |
| 1989 | 11.6 | 11.4 | 11.7 | 12.8 | 14.7 | 15.3 | 14.1 | 14.5 | 14.0 | 13.4 | 14.8 | 14.7 | 15.1 | 15.6 | 16.0 | 15.8 | 15.3 | 15.0 | 14.3 | 14.9 | 15.1 | 15.4 | 15.5 | 14.7 | 14.7 | 14.7 | 15.4 | 14.2 | 14.0 | 14.2 | 15.3 | 14.3 | 14.4 | 15.2 | 14.5 | 15.3 | 14.9 | 14.7 | 14.4 | 15.4 | 14.6 | 14.0 | 16.4 | 16.8 | 17.0 | 17.0 | 19.0 | 22.1 | 20.4 | 18.7 | 20.1 | 21.0 | 20.5 | 20.1 | 21.7 | 21.7 | 19.9 | 21.6 | 19.7 | 20.1 | 28.6 | 29.6 | 1990 | | | |
| 1990 | 11.2 | 11.0 | 11.2 | 12.3 | 14.2 | 14.7 | 13.6 | 14.0 | 13.5 | 12.8 | 14.2 | 14.1 | 14.5 | 14.9 | 15.3 | 15.1 | 14.6 | 14.2 | 13.6 | 14.1 | 14.3 | 14.7 | 14.6 | 13.9 | 13.9 | 13.9 | 14.5 | 13.3 | 13.1 | 13.2 | 14.3 | 13.3 | 13.3 | 14.1 | 13.6 | 14.3 | 14.0 | 13.7 | 13.4 | 14.4 | 13.9 | 13.4 | 15.0 | 15.1 | 15.1 | 15.1 | 16.8 | 19.5 | 17.8 | 16.1 | 17.1 | 17.7 | 16.9 | 16.3 | 17.1 | 16.6 | 14.4 | 14.9 | 12.1 | 10.7 | 12.7 | 5.9 | -13.5 | 1991 | | | | |
| 1991 | 11.5 | 11.3 | 11.5 | 12.5 | 14.4 | 14.9 | 13.8 | 14.2 | 13.7 | 13.1 | 14.4 | 14.3 | 14.7 | 15.2 | 15.5 | 15.4 | 14.9 | 14.6 | 13.9 | 14.4 | 14.6 | 15.0 | 15.0 | 14.3 | 14.2 | 14.2 | 14.8 | 13.7 | 13.5 | 13.7 | 14.7 | 13.7 | 13.8 | 14.5 | 14.1 | 14.8 | 14.5 | 14.3 | 14.0 | 14.9 | 14.2 | 13.7 | 15.4 | 15.7 | 15.8 | 15.8 | 17.5 | 20.0 | 18.5 | 16.9 | 17.9 | 18.6 | 17.9 | 17.4 | 18.3 | 18.0 | 16.2 | 16.8 | 14.8 | 14.2 | 16.6 | 13.2 | 5.8 | 29.4 | 1992 | | | | |
| 1992 | 11.5 | 11.3 | 11.6 | 12.6 | 14.5 | 15.0 | 13.9 | 14.3 | 13.8 | 13.2 | 14.5 | 14.4 | 14.8 | 15.2 | 15.6 | 15.4 | 15.0 | 14.6 | 14.0 | 14.5 | 14.7 | 15.0 | 15.0 | 14.3 | 14.3 | 14.3 | 14.9 | 13.8 | 13.6 | 13.8 | 14.8 | 13.8 | 13.9 | 14.6 | 14.2 | 14.9 | 14.6 | 14.4 | 14.1 | 15.0 | 14.3 | 13.8 | 15.5 | 15.7 | 15.8 | 15.8 | 17.5 | 19.9 | 18.6 | 16.9 | 17.9 | 18.4 | 17.8 | 17.4 | 18.2 | 17.9 | 16.3 | 16.9 | 15.2 | 14.6 | 16.7 | 14.1 | 9.4 | 23.0 | 17.0 | 1993 | | | | |
| 1993 | 11.7 | 11.5 | 11.8 | 12.7 | 14.6 | 15.1 | 14.0 | 14.4 | 13.9 | 13.3 | 14.6 | 14.5 | 14.9 | 15.3 | 15.7 | 15.5 | 15.1 | 14.7 | 14.1 | 14.7 | 14.8 | 15.2 | 15.2 | 14.5 | 14.5 | 14.5 | 15.1 | 14.0 | 13.8 | 14.0 | 15.0 | 14.0 | 14.1 | 14.8 | 14.4 | 15.1 | 14.8 | 14.6 | 14.4 | 15.2 | 14.6 | 14.1 | 15.8 | 16.0 | 16.1 | 16.1 | 17.7 | 20.0 | 18.6 | 17.2 | 18.1 | 18.7 | 18.1 | 17.7 | 18.5 | 18.2 | 16.8 | 17.4 | 16.0 | 15.6 | 17.5 | 15.6 | 12.3 | 22.6 | 19.4 | 21.7 | 1994 | | | | |
| 1994 | 11.5 | 11.4 | 11.6 | 12.6 | 14.4 | 14.8 | 13.8 | 14.2 | 13.7 | 13.1 | 14.4 | 14.3 | 14.7 | 15.1 | 15.4 | 15.2 | 14.8 | 14.5 | 13.9 | 14.4 | 14.5 | 14.9 | 14.9 | 14.2 | 14.2 | 14.2 | 14.7 | 13.7 | 13.4 | 13.7 | 14.6 | 13.7 | 13.8 | 14.4 | 14.0 | 14.7 | 14.4 | 14.2 | 13.9 |

# Dimensional US Small Cap Value Index

1928–2024 in USD



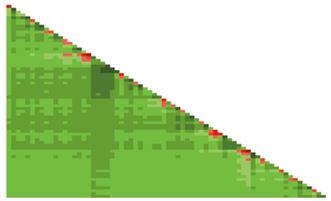


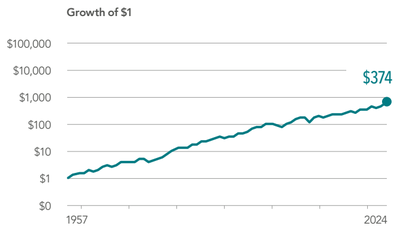

See Sources and Descriptions of Data.

| | 1928 | 1929 | 1930 | 1931 | 1932 | 1933 | 1934 | 1935 | 1936 | 1937 | 1938 | 1939 | 1940 | 1941 | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 | 1953 | 1954 | 1955 | 1956 | 1957 | 1958 | 1959 | 1960 | 1961 | 1962 | 1963 | 1964 | 1965 | 1966 | 1967 | 1968 | 1969 | 1970 | 1971 | 1972 | 1973 | 1974 | 1975 | 1976 | 1977 | 1978 | 1979 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---

# S&P/TSX Composite Index

1957–2024 in CAD



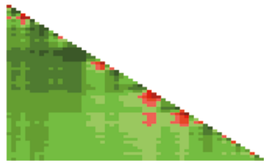


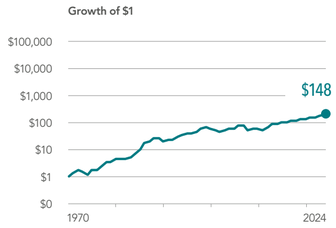

See Sources and Descriptions of Data.

| | 1957 | | |

# MSCI EAFE Index

1970–2024 in CAD






See Sources and Descriptions of Data.

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|---|---|
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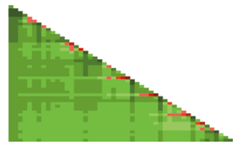
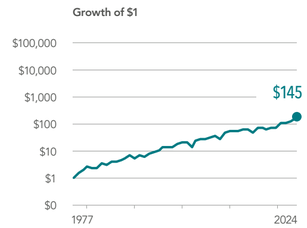
| 1972 | 14.1 33.3 36.9 1973 |
| 1973 | 6.4 15.3 8.7 -13.7 1974 |
| 1974 | -0.2 4.3 -3.1 -18.5 -22.9 1975 |
| 1975 | 5.7 10.7 6.4 -2.2 4.1 40.7 1976 |
| 1976 | 5.3 9.4 5.7 -0.9 3.8 20.5 3.1 1977 |
| 1977 | 8.0 12.1 9.3 4.5 9.7 23.4 15.5 29.3 1978 |
| 1978 | 11.7 15.8 13.9 10.5 16.0 28.5 24.7 37.2 45.5 1979 |
| 1979 | 11.0 14.5 12.8 9.7 14.2 23.5 19.5 25.5 23.7 5.1 1980 |
| 1980 | 12.3 15.6 14.1 11.6 15.8 23.9 20.8 25.6 24.4 15.0 25.9 1981 |
| 1981 | 11.1 14.0 12.5 10.1 13.5 20.0 16.8 19.8 17.5 9.4 11.7 -0.9 1982 |
| 1982 | 10.4 13.0 11.6 9.4 12.3 17.7 14.7 16.8 14.4 7.8 8.7 0.9 2.9 1983 |
| 1983 | 11.4 13.9 12.7 10.7 13.5 18.5 16.0 17.9 16.1 11.0 12.5 8.4 13.4 25.0 1984 |
| 1984 | 11.7 14.0 12.9 11.1 13.6 18.1 15.9 17.6 16.0 11.7 13.0 10.0 14.0 19.9 15.1 1985 |
| 1985 | 14.5 16.9 16.0 14.6 17.3 21.9 20.1 22.2 21.3 18.2 20.5 19.5 25.2 33.7 38.3 66.1 1986 |
| 1986 | 17.1 19.6 18.9 17.7 20.6 25.2 23.8 26.1 25.8 23.5 26.4 26.4 32.8 41.5 47.5 67.0 67.8 1987 |
| 1987 | 17.1 19.5 18.8 17.7 20.4 24.6 23.3 25.3 24.9 22.8 25.3 25.2 30.1 36.4 39.4 48.6 40.6 17.8 1988 |
| 1988 | 17.2 19.4 18.8 17.7 20.2 24.1 22.9 24.7 24.3 22.3 24.4 24.2 28.3 33.1 34.8 40.2 32.6 17.8 17.8 1989 |
| 1989 | 16.7 18.7 18.1 17.1 19.4 22.9 21.7 23.3 22.8 20.9 22.6 22.2 25.5 29.1 29.8 33.0 25.8 14.3 12.6 7.5 1990 |
| 1990 | 14.4 16.2 15.5 14.4 16.3 19.4 18.0 19.2 18.4 16.4 17.5 16.7 18.9 21.0 20.5 21.4 14.0 3.5 -0.8 -9.0 -23.1 1991 |
| 1991 | 14.3 16.0 15.3 14.3 16.1 18.9 17.7 18.7 18.0 16.1 17.1 16.3 18.2 20.0 19.4 20.0 13.7 5.2 2.2 -2.5 -7.1 12.1 1992 |
| 1992 | 13.4 15.0 14.4 13.3 15.0 17.6 16.3 17.2 16.4 14.6 15.4 14.5 16.1 17.5 16.7 16.8 11.1 3.7 1.1 -2.6 -5.8 4.2 -3.1 1993 |
| 1993 | 14.4 16.0 15.4 14.4 16.1 18.6 17.5 18.4 17.7 16.1 16.9 16.2 17.8 19.2 18.7 19.1 14.2 8.1 6.6 4.5 3.7 14.6 15.9 38.6 1994 |
| 1994 | 14.4 15.9 15.3 14.4 16.0 18.4 17.3 18.1 17.5 16.0 16.7 16.1 17.5 18.8 18.3 18.6 14.3 8.9 7.7 6.1 5.8 14.6 15.4 26.0 14.5 1995 |
| 1995 | 14.2 15.6 15.0 14.2 15.6 17.9 16.8 17.6 17.0 15.5 16.2 15.6 16.9 18.0 17.4 17.7 13.7 8.9 7.8 6.4 6.2 13.3 13.6 19.8 11.4 8.5 1996 |
| 1996 | 13.9 15.2 14.7 13.9 15.2 17.4 16.4 17.1 16.4 15.0 15.6 15.0 16.2 17.2 16.6 16.7 13.0 8.7 7.7 6.5 6.3 12.2 12.3 16.5 9.9 7.7 6.9 1997 |
| 1997 | 13.6 14.9 14.4 13.6 14.9 16.9 15.9 16.5 15.9 14.6 15.1 14.5 15.5 16.4 15.8 15.9 12.5 8.5 7.6 6.5 6.4 11.4 11.3 14.4 9.1 7.3 6.7 6.6 1998 |
| 1998 | 14.1 15.4 14.9 14.1 15.4 17.4 16.4 17.1 16.5 15.2 15.8 15.3 16.3 17.2 16.7 16.8 13.7 10.1 9.4 8.6 8.7 13.5 13.7 16.7 12.8 12.4 13.7 17.3 29.2 1999 |
| 1999 | 14.3 15.6 15.1 14.3 15.6 17.5 16.6 17.2 16.7 15.5 16.0 15.5 16.5 17.4 16.9 17.0 14.1 10.8 10.2 9.6 9.8 14.2 14.5 17.2 14.0 13.9 15.3 18.3 24.6 20.3 2000 |
| 2000 | 13.4 14.6 14.1 13.3 14.5 16.2 15.3 15.9 15.3 14.1 14.6 14.0 14.9 15.6 15.1 15.1 12.3 9.1 8.4 7.7 7.7 11.4 11.3 13.3 10.1 9.3 9.5 10.2 11.4 3.5 -11.0 2001 |
| 2001 | 12.3 13.4 12.9 12.1 13.2 14.8 13.9 14.4 13.8 12.6 12.9 12.4 13.1 13.6 13.0 12.9 10.2 7.2 6.5 5.6 5.5 8.5 8.2 9.5 6.4 5.3 4.7 4.3 3.7 -3.6 -13.6 -16.3 2002 |
| 2002 | 11.3 12.3 11.8 11.0 12.0 13.5 12.6 13.0 12.4 11.2 11.5 10.9 11.5 11.9 11.3 11.0 8.4 5.5 4.8 3.9 3.6 6.2 5.7 6.6 3.5 2.2 1.4 0.5 -0.7 -7.0 -14.6 -16.4 -16.5 2003 |
| 2003 | 11.4 12.4 11.9 11.1 12.1 13.5 12.7 13.0 12.5 11.3 11.6 11.0 11.6 12.0 11.4 11.2 8.7 6.0 5.3 4.5 4.3 6.8 6.3 7.2 4.5 3.5 2.9 2.3 1.6 -3.1 -8.3 -7.3 -2.5 13.8 2004 |
| 2004 | 11.4 12.4 11.9 11.2 12.1 13.5 12.6 13.0 12.4 11.3 11.6 11.0 11.6 12.0 11.4 11.2 8.9 6.3 5.7 5.0 4.8 7.1 6.8 7.6 5.2 4.3 3.8 3.5 3.0 -0.8 -4.5 -2.9 2.1 12.9 11.9 2005 |
| 2005 | 11.4 12.3 11.8 11.2 12.0 13.4 12.6 12.9 12.4 11.3 11.6 11.0 11.6 12.0 11.4 11.2 9.0 6.6 6.0 5.3 5.2 7.4 7.1 7.9 5.7 4.9 4.5 4.3 4.0 0.8 -2.1 -0.2 4.3 12.3 11.5 11.2 2006 |
| 2006 | 11.8 12.7 12.2 11.6 12.5 13.8 13.0 13.4 12.8 11.8 12.1 11.6 12.1 12.5 12.0 11.9 9.8 7.5 7.0 6.4 6.3 8.5 8.3 9.1 7.1 6.5 6.4 6.3 6.3 3.7 1.6 3.8 8.4 15.7 16.3 18.5 26.4 2007 |
| 2007 | 11.3 12.2 11.7 11.1 11.9 13.2 12.4 12.7 12.2 11.2 11.4 10.9 11.4 11.7 11.2 11.1 9.0 6.8 6.3 5.7 5.6 7.6 7.4 8.1 6.2 5.6 5.3 5.2 5.1 2.7 0.7 2.4 5.9 11.1 10.5 10.0 9.4 -5.3 2008 |
| 2008 | 10.0 10.8 10.4 9.7 10.5 11.6 10.8 11.1 10.6 9.5 9.7 9.2 9.6 9.8 9.3 9.0 7.0 4.9 4.3 3.7 3.5 5.2 4.8 5.3 3.4 2.6 2.2 1.8 1.4 -1.0 -3.1 -2.1 0.1 3.2 1.2 -1.3 -5.2 -17.9 -28.8 2009 |
| 2009 | 10.1 10.9 10.4 9.8 10.5 11.7 10.9 11.1 10.6 9.6 9.8 9.3 9.7 9.9 9.4 9.2 7.3 5.2 4.7 4.1 3.9 5.6 5.2 5.7 3.9 3.3 2.9 2.6 2.3 0.1 -1.7 -0.6 1.6 4.5 3.0 1.3 -1.1 -8.8 -10.5 12.5 2010 |
| 2010 | 9.9 10.7 10.2 9.6 10.3 11.4 10.6 10.9 10.4 9.4 9.6 9.0 9.4 9.7 9.1 8.9 7.1 5.1 4.6 4.0 3.8 5.4 5.1 5.5 3.9 3.2 2.9 2.6 2.3 0.3 -1.3 -0.3 1.7 4.2 2.9 1.5 -0.3 -6.1 -6.3 7.4 2.6 2011 |
| 2011 | 9.4 10.1 9.7 9.0 9.7 10.8 10.0 10.2 9.7 8.8 8.9 8.4 8.7 8.9 8.4 8.2 6.4 4.5 3.9 3.4 3.2 4.6 4.3 4.7 3.1 2.4 2.1 1.8 1.4 -0.5 -2.0 -1.2 0.5 2.6 1.3 -0.2 -1.9 -6.8 -7.1 1.4 -3.7 -9.5 2012 |
| 2012 | 9.5 10.2 9.8 9.2 9.9 10.9 10.2 10.4 9.9 9.0 9.1 8.6 8.9 9.1 8.6 8.4 6.7 4.9 4.4 3.8 3.7 5.1 4.8 5.2 3.7 3.1 2.8 2.5 2.3 0.6 -0.8 0.1 1.8 3.8 2.7 1.6 0.4 -3.4 -3.0 4.7 2.3 2.1 15.3 2013 |
| 2013 | 10.0 10.7 10.3 9.7 10.3 11.4 10.7 10.9 10.4 9.6 9.7 9.2 9.6 9.8 9.3 9.1 7.5 5.7 5.3 4.8 4.7 6.1 5.9 6.3 4.9 4.4 4.2 4.1 3.9 2.4 1.2 2.2 4.0 6.1 5.3 4.6 3.8 0.9 2.0 9.6 8.9 11.1 23.2 31.6 2014 |
| 2014 | 9.9 10.5 10.1 9.6 10.2 11.2 10.5 10.7 10.2 9.4 9.5 9.1 9.4 9.6 9.1 9.0 7.4 5.7 5.3 4.8 4.7 6.0 5.8 6.2 4.9 4.4 4.2 4.1 3.9 2.5 1.4 2.4 4.0 5.9 5.2 4.6 3.8 1.3 2.3 8.7 7.9 9.3 16.5 17.0 4.1 2015 |
| 2015 | 10.1 10.7 10.3 9.8 10.4 11.4 10.7 10.9 10.5 9.7 9.8 9.4 9.7 9.9 9.5 9.3 7.8 6.1 5.7 5.3 5.2 6.6 6.3 6.8 5.5 5.1 4.9 4.8 4.7 3.4 2.5 3.4 5.0 6.9 6.3 5.8 5.3 3.2 4.3 10.2 9.8 11.3 17.2 17.8 11.5 19.5 2016 |
| 2016 | 9.8 10.4 10.0 9.5 10.1 11.0 10.4 10.6 10.1 9.3 9.5 9.0 9.3 9.5 9.1 8.9 7.4 5.8 5.5 5.0 5.0 6.2 6.0 6.4 5.2 4.8 4.6 4.5 4.4 3.1 2.2 3.1 4.5 6.2 5.7 5.2 4.6 2.7 3.6 8.6 8.0 8.9 13.1 12.5 6.8 8.2 -2.0 2017 |
| 2017 | 9.9 10.6 10.2 9.7 10.3 11.2 10.6 10.7 10.3 9.5 9.7 9.2 9.5 9.7 9.3 9.2 7.7 6.2 5.8 5.4 5.4 6.6 6.4 6.8 5.6 5.3 5.1 5.1 5.0 3.8 3.0 3.9 5.3 6.9 6.5 6.0 5.6 3.9 4.9 9.5 9.1 10.1 13.8 13.5 9.4 11.2 7.2 17.4 2018 |
| 2018 | 9.6 10.2 9.8 9.3 9.9 10.8 10.2 10.3 9.9 9.1 9.2 8.8 9.1 9.3 8.9 8.7 7.3 5.8 5.4 5.1 5.0 6.1 5.9 6.3 5.2 4.8 4.6 4.5 4.5 3.3 2.5 3.3 4.6 6.1 5.6 5.2 4.7 3.1 3.9 7.9 7.4 8.0 10.8 10.1 6.2 6.7 2.8 5.3 -5.6 2019 |
| 2019 | 9.7 10.3 10.0 9.5 10.0 10.9 10.3 10.5 10.1 9.3 9.4 9.0 9.3 9.5 9.1 8.9 7.6 6.1 5.8 5.4 5.3 6.5 6.3 6.7 5.6 5.2 5.1 5.0 5.0 3.9 3.2 4.0 5.2 6.7 6.3 5.9 5.5 4.1 4.9 8.6 8.3 8.9 11.5 11.0 7.8 8.6 6.1 8.9 4.9 16.5 2020 |
| 2020 | 9.7 10.3 9.9 9.4 9.9 10.8 10.2 10.4 10.0 9.2 9.3 9.0 9.2 9.4 9.0 8.8 7.5 6.1 5.8 5.4 5.4 6.5 6.3 6.6 5.6 5.3 5.2 5.1 5.0 4.0 3.3 4.1 5.3 6.7 6.3 5.9 5.6 4.2 5.0 8.5 8.1 8.7 10.9 10.4 7.6 8.2 6.1 8.3 5.4 11.3 6.4 2021 |
| 2021 | 9.7 10.3 9.9 9.4 10.0 10.8 10.2 10.4 10.0 9.3 9.4 9.0 9.3 9.4 9.0 8.9 7.6 6.3 5.9 5.6 5.5 6.6 6.4 6.8 5.8 5.5 5.4 5.3 5.3 4.3 3.7 4.4 5.6 6.9 6.5 6.2 5.9 4.7 5.4 8.6 8.3 8.9 10.9 10.4 8.0 8.6 6.9 8.8 6.7 11.1 8.6 10.8 2022 |
| 2022 | 9.3 9.9 9.5 9.0 9.6 10.4 9.8 10.0 9.6 8.9 8.9 8.6 8.8 9.0 8.6 8.4 7.2 5.8 5.5 5.2 5.1 6.1 6.0 6.3 5.3 5.0 4.9 4.8 4.7 3.8 3.1 3.8 4.9 6.1 5.7 5.4 5.0 3.8 4.5 7.4 7.0 7.4 9.1 8.5 6.1 6.4 4.7 5.8 3.6 6.1 2.8 1.1 -7.8 2023 |
| 2023 | 9.4 10.0 9.6 9.2 9.7 10.5 9.9 10.1 9.7 9.0 9.1 8.7 9.0 9.1 8.8 8.6 7.4 6.1 5.8 5.5 5.4 6.4 6.2 6.6 5.6 5.3 5.2 5.2 5.1 4.2 3.6 4.3 5.4 6.5 6.2 5.9 5.6 4.5 5.1 7.9 7.6 8.0 9.6 9.1 7.1 7.4 6.0 7.2 5.6 7.9 5.9 5.7 3.3 15.7 2024 |
| 2024 | 9.5 10.1 9.7 9.3 9.8 10.5 10.0 10.1 9.8 9.1 9.2 8.8 9.1 9.2 8.9 8.7 7.5 6.3 6.0 5.7 5.6 6.6 6.5 6.8 5.9 5.6 5.5 5.5 5.4 4.6 4.0 4.7 5.7 6.9 6.5 6.3 6.0 5.0 5.6 8.3 8.0 8.4 9.9 9.5 7.7 8.0 6.8 8.0 6.7 8.9 7.4 7.7 6.7 14.7 13.8 |
| | 1970 1971 1972 1973 1974 1975 1976 1977 1978 1979 1980 1981 1982 1983 1984 1985 1986 1987 1988 1989 1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 |

# Fama/French Canada Value Index

1977–2024 in CAD






See Sources and Descriptions of Data.

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|---|---|
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| 1978 | 27.4 44.4 1979 |
| 1979 | 31.3 41.9 39.4 1980 |
| 1980 | 28.4 34.2 29.4 20.0 1981 |
| 1981 | 21.2 23.5 17.3 7.6 -3.6 1982 |
| 1982 | 16.4 17.2 11.3 3.2 -4.3 -4.9 1983 |
| 1983 | 20.3 21.6 17.5 12.6 10.3 17.9 46.4 1984 |
| 1984 | 16.9 17.6 13.6 9.1 6.5 10.1 18.5 -4.0 1985 |
| 1985 | 17.3 17.9 14.6 10.9 9.1 12.6 19.1 7.5 20.4 1986 |
| 1986 | 16.3 16.7 13.7 10.4 8.9 11.6 16.1 7.5 13.8 7.6 1987 |
| 1987 | 16.0 16.4 13.6 10.8 9.5 11.9 15.6 8.9 13.6 10.4 13.3 1988 |
| 1988 | 16.0 16.3 13.9 11.3 10.3 12.4 15.6 10.3 14.2 12.2 14.6 16.0 1989 |
| 1989 | 16.4 16.7 14.5 12.2 11.4 13.4 16.3 11.9 15.4 14.2 16.5 18.2 20.5 1990 |
| 1990 | 13.6 13.6 11.4 9.2 8.1 9.5 11.5 7.2 9.2 7.1 7.0 5.0 -0.1 -17.2 1991 |
| 1991 | 14.0 14.1 12.0 10.0 9.1 10.5 12.3 8.7 10.6 9.1 9.4 8.4 6.0 -0.5 19.5 1992 |
| 1992 | 12.0 12.0 10.0 8.0 7.0 8.1 9.5 6.0 7.3 5.6 5.2 3.7 0.8 -5.0 1.8 -13.4 1993 |
| 1993 | 13.4 13.5 11.7 9.9 9.2 10.3 11.8 8.8 10.4 9.2 9.4 8.8 7.4 4.4 12.8 9.5 38.5 1994 |
| 1994 | 13.1 13.2 11.5 9.8 9.1 10.2 11.5 8.8 10.2 9.1 9.3 8.8 7.6 5.2 11.7 9.2 22.6 8.6 1995 |
| 1995 | 13.3 13.4 11.8 10.3 9.6 10.6 11.9 9.5 10.8 9.9 10.1 9.7 8.9 7.1 12.7 11.1 20.6 12.6 16.8 1996 |
| 1996 | 14.2 14.3 12.9 11.5 11.0 12.0 13.3 11.1 12.5 11.8 12.2 12.1 11.6 10.4 15.8 15.1 23.6 19.0 24.6 32.9 1997 |
| 1997 | 13.9 14.0 12.6 11.3 10.8 11.7 13.0 10.9 12.1 11.5 11.8 11.7 11.2 10.1 14.7 13.9 20.3 16.2 18.8 19.8 8.0 1998 |
| 1998 | 13.1 13.2 11.8 10.5 10.0 10.9 11.9 9.9 11.0 10.3 10.5 10.3 9.8 8.6 12.4 11.4 16.2 12.1 13.1 11.8 2.6 -2.6 1999 |
| 1999 | 13.3 13.4 12.1 10.9 10.4 11.2 12.3 10.4 11.5 10.8 11.1 10.9 10.5 9.5 13.0 12.2 16.4 13.1 14.0 13.3 7.5 7.2 17.9 2000 |
| 2000 | 13.2 13.2 12.0 10.8 10.4 11.2 12.1 10.4 11.4 10.8 11.0 10.8 10.4 9.6 12.7 11.9 15.6 12.6 13.3 12.6 8.1 8.1 13.8 9.9 2001 |
| 2001 | 13.2 13.2 12.0 10.9 10.5 11.2 12.2 10.5 11.4 10.9 11.1 11.0 10.6 9.8 12.7 12.0 15.2 12.6 13.2 12.6 8.9 9.2 13.4 11.2 12.5 2002 |
| 2002 | 11.0 11.0 9.7 8.6 8.1 8.7 9.4 7.8 8.5 7.8 7.8 7.5 6.9 5.9 8.1 7.1 9.4 6.6 6.4 5.0 0.9 -0.5 0.1 -5.2 -12.0 -31.2 2003 |
| 2003 | 12.4 12.4 11.2 10.2 9.8 10.4 11.2 9.7 10.5 10.0 10.1 9.9 9.5 8.8 11.1 10.4 12.9 10.6 10.8 10.1 7.2 7.0 9.1 7.0 6.0 2.9 54.0 2004 |
| 2004 | 12.4 12.4 11.4 10.4 10.0 10.6 11.4 9.9 10.7 10.2 10.3 10.2 9.8 9.2 11.3 10.7 13.0 10.9 11.2 10.6 8.1 8.1 9.9 8.4 8.1 6.6 32.7 14.3 2005 |
| 2005 | 12.3 12.3 11.3 10.3 9.9 10.5 11.3 9.9 10.6 10.1 10.2 10.1 9.7 9.1 11.1 10.6 12.7 10.7 10.9 10.4 8.1 8.1 9.7 8.4 8.1 7.1 24.1 11.4 8.5 2006 |
| 2006 | 12.4 12.4 11.4 10.4 10.1 10.7 11.4 10.1 10.7 10.3 10.4 10.3 10.0 9.4 11.3 10.8 12.8 11.0 11.2 10.7 8.7 8.8 10.3 9.2 9.1 8.5 21.5 12.3 11.3 14.1 2007 |
| 2007 | 12.4 12.4 11.5 10.6 10.2 10.8 11.5 10.2 10.9 10.5 10.6 10.5 10.2 9.7 11.5 11.0 12.8 11.2 11.4 11.0 9.2 9.3 10.7 9.8 9.8 9.4 20.0 12.8 12.2 14.1 14.1 2008 |
| 2008 | 10.8 10.7 9.7 8.8 8.4 8.9 9.5 8.2 8.8 8.3 8.3 8.1 7.7 7.1 8.6 8.0 9.5 7.8 7.8 7.1 5.2 4.9 5.7 4.4 3.8 2.6 9.6 2.4 -0.3 -3.1 -10.8 -30.2 2009 |
| 2009 | 12.2 12.2 11.3 10.5 10.2 10.7 11.3 10.1 10.8 10.4 10.5 10.4 10.1 9.6 11.3 10.8 12.4 11.0 11.1 10.7 9.2 9.3 10.4 9.7 9.7 9.4 16.8 11.6 11.0 11.7 10.9 9.3 71.2 2010 |
| 2010 | 12.5 12.5 11.6 10.8 10.5 11.1 11.7 10.6 11.2 10.8 11.0 10.9 10.6 10.2 11.8 11.4 12.9 11.6 11.8 11.5 10.1 10.2 11.4 10.8 10.9 10.7 17.5 13.0 12.8 13.7 13.6 13.4 44.5 22.0 2011 |
| 2011 | 11.8 11.8 10.9 10.1 9.8 10.3 10.9 9.8 10.3 10.0 10.0 9.9 9.7 9.2 10.6 10.2 11.6 10.3 10.4 10.0 8.6 8.7 9.6 8.9 8.8 8.5 14.1 9.9 9.3 9.4 8.5 7.1 23.6 5.0 -9.6 2012 |
| 2012 | 11.8 11.7 10.9 10.1 9.8 10.3 10.9 9.8 10.3 10.0 10.1 9.9 9.7 9.3 10.6 10.2 11.6 10.3 10.4 10.0 8.7 8.8 9.7 9.0 9.0 8.7 13.7 10.0 9.4 9.6 8.8 7.8 20.2 6.8 0.0 10.6 2013 |
| 2013 | 11.7 11.6 10.8 10.1 9.8 10.2 10.8 9.7 10.3 9.9 10.0 9.9 9.6 9.2 10.5 10.1 11.4 10.2 10.3 9.9 8.7 8.8 9.6 9.0 8.9 8.6 13.2 9.8 9.3 9.4 8.7 7.9 17.7 7.1 2.6 9.4 8.1 2014 |
| 2014 | 11.3 11.3 10.5 9.7 9.5 9.9 10.4 9.4 9.9 9.5 9.6 9.4 9.2 8.8 10.0 9.6 10.8 9.6 9.7 9.3 8.1 8.1 8.9 8.3 8.2 7.8 12.0 8.8 8.2 8.2 7.5 6.5 14.3 5.5 1.7 5.8 3.4 -1.1 2015 |
| 2015 | 10.5 10.4 9.6 8.9 8.6 9.0 9.4 8.4 8.9 8.5 8.5 8.4 8.1 7.6 8.8 8.3 9.4 8.2 8.2 7.8 6.6 6.6 7.1 6.5 6.3 5.8 9.4 6.3 5.6 5.3 4.4 3.2 9.2 1.3 -2.4 -0.5 -4.0 -9.5 -17.2 2016 |
| 2016 | 11.2 11.1 10.4 9.7 9.4 9.8 10.2 9.3 9.7 9.4 9.5 9.4 9.1 8.7 9.9 9.5 10.6 9.5 9.5 9.2 8.1 8.2 8.8 8.3 8.2 7.9 11.4 8.7 8.2 8.2 7.6 6.9 12.7 6.2 3.8 6.7 5.8 5.0 8.2 41.3 2017 |
| 2017 | 11.0 11.0 10.2 9.5 9.3 9.7 10.1 9.2 9.6 9.3 9.3 9.2 9.0 8.6 9.7 9.3 10.4 9.3 9.4 9.0 8.0 8.0 8.6 8.1 8.0 7.7 11.0 8.4 8.0 7.9 7.4 6.7 11.9 6.1 4.0 6.5 5.7 5.1 7.2 22.0 5.4 2018 |
| 2018 | 10.3 10.2 9.5 8.8 8.5 8.9 9.3 8.4 8.8 8.4 8.5 8.3 8.1 7.7 8.7 8.3 9.2 8.2 8.2 7.8 6.8 6.7 7.2 6.7 6.5 6.2 9.1 6.6 6.1 5.9 5.2 4.4 8.7 3.4 1.3 2.9 1.7 0.5 0.9 7.8 -5.9 -16.0 2019 |
| 2019 | 10.5 10.4 9.7 9.1 8.8 9.1 9.5 8.7 9.1 8.7 8.8 8.6 8.4 8.0 9.0 8.7 9.6 8.6 8.6 8.3 7.3 7.3 7.8 7.3 7.2 6.9 9.7 7.4 6.9 6.8 6.3 5.6 9.7 4.9 3.2 4.9 4.1 3.4 4.4 10.6 1.9 0.2 19.5 2020 |
| 2020 | 10.2 10.1 9.4 8.8 8.5 8.9 9.2 8.4 8.8 8.4 8.5 8.3 8.1 7.7 8.7 8.3 9.2 8.2 8.2 7.9 6.9 6.9 7.3 6.9 6.7 6.4 9.0 6.8 6.4 6.2 5.7 5.1 8.7 4.3 2.7 4.2 3.4 2.7 3.4 8.1 1.1 -0.3 8.6 -1.3 2021 |
| 2021 | 10.8 10.8 10.1 9.5 9.3 9.6 10.0 9.2 9.6 9.3 9.3 9.2 9.0 8.7 9.6 9.3 10.2 9.3 9.3 9.1 8.2 8.2 8.7 8.3 8.2 8.0 10.6 8.6 8.3 8.2 7.9 7.4 11.1 7.1 5.9 7.6 7.2 7.1 8.3 13.3 8.4 9.2 19.1 18.9 43.3 2022 |
| 2022 | 10.6 10.6 9.9 9.3 9.0 9.4 9.7 8.9 9.3 9.0 9.1 8.9 8.7 8.4 9.3 9.0 9.8 9.0 9.0 8.7 7.9 7.9 8.3 7.9 7.8 7.6 10.0 8.1 7.8 7.7 7.4 6.9 10.2 6.6 5.4 6.8 6.5 6.3 7.2 11.3 6.9 7.3 14.0 12.2 19.7 0.0 2023 |
| 2023 | 10.7 10.6 10.0 9.4 9.2 9.5 9.9 9.1 9.4 9.2 9.2 9.1 8.9 8.6 9.5 9.2 10.0 9.1 9.2 8.9 8.1 8.1 8.6 8.2 8.1 7.9 10.2 8.4 8.1 8.1 7.7 7.4 10.5 7.1 6.0 7.4 7.2 7.1 8.0 11.7 8.0 8.4 14.1 12.8 17.9 6.9 14.3 2024 |
| 2024 | 10.9 10.9 10.3 9.7 9.5 9.8 10.2 9.4 9.8 9.5 9.5 9.4 9.3 9.0 9.9 9.6 10.4 9.6 9.6 9.4 8.6 8.6 9.1 8.7 8.7 8.5 10.8 9.1 8.8 8.8 8.6 8.2 11.3 8.1 7.2 8.6 8.4 8.5 9.5 12.9 9.8 10.4 15.6 14.8 19.2 12.1 18.7 23.3 |
| | 1977 1978 1979 1980 1981 1982 1983 1984 1985 1986 1987 1988 1989 1990 1991 1992 1993 1994 1995 1996 1997 1998 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024 |

# Dimensional International Small Cap Index

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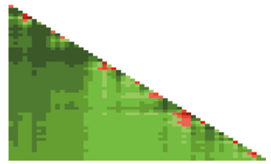
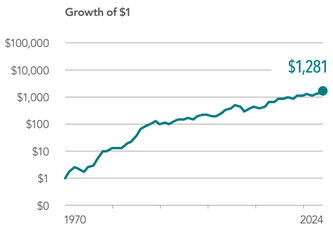


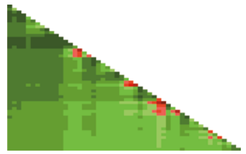


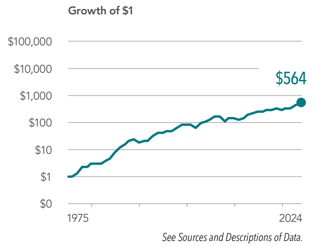

*See Sources and Descriptions of Data.*

| | 1970 | | |

# Fama/French International Value Index

1975–2024 in CAD



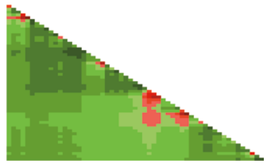


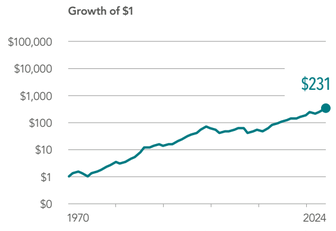

*See Sources and Descriptions of Data.*

| | 1975 | | |

# MSCI World Index

1970–2024 in CAD






See Sources and Descriptions of Data.

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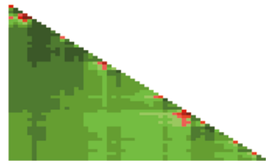
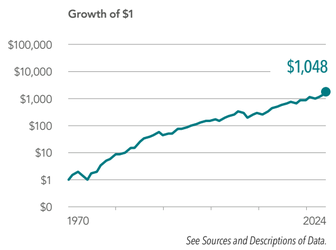
| 1972 | 10.0 | 20.6 | 22.9 | 1973 | | | | | | | |
| 1973 | 3.4 | 7.7 | 2.8 | -14.1 | 1974 | | | | | | |
| 1974 | -3.1 | -1.7 | -7.6 | -19.8 | -25.2 | 1975 | | | | | |
| 1975 | 2.8 | 5.2 | 2.2 | -3.9 | 1.6 | 38.0 | 1976 | | | | |
| 1976 | 4.4 | 6.6 | 4.4 | 0.3 | 5.6 | 25.5 | 14.0 | 1977 | | | |
| 1977 | 5.1 | 7.2 | 5.4 | 2.2 | 6.8 | 20.3 | 12.2 | 10.5 | 1978 | | |
| 1978 | 7.4 | 9.6 | 8.4 | 6.2 | 10.7 | 22.2 | 17.3 | 18.9 | 28.0 | 1979 | |
| 1979 | 7.8 | 9.8 | 8.8 | 6.9 | 10.9 | 20.0 | 15.8 | 16.4 | 19.5 | 11.6 | 1980 |
| 1980 | 9.6 | 11.6 | 10.9 | 9.5 | 13.3 | 21.5 | 18.4 | 19.5 | 22.7 | 20.1 | 29.2 |
| 1981 | 8.5 | 10.2 | 9.4 | 8.0 | 11.1 | 17.6 | 14.5 | 14.6 | 15.6 | 11.7 | 11.8 |
| 1982 | 9.0 | 10.6 | 9.9 | 8.7 | 11.6 | 17.3 | 14.6 | 14.7 | 15.6 | 12.7 | 13.0 |
| 1983 | 10.0 | 11.6 | 11.0 | 10.0 | 12.7 | 18.0 | 15.7 | 15.9 | 16.9 | 14.8 | 15.6 |
| 1984 | 10.2 | 11.6 | 11.2 | 10.2 | 12.7 | 17.5 | 15.4 | 15.6 | 16.3 | 14.5 | 15.0 |
| 1985 | 12.3 | 13.9 | 13.6 | 12.9 | 15.5 | 20.1 | 18.5 | 19.0 | 20.1 | 19.0 | 20.3 |
| 1986 | 13.9 | 15.4 | 15.2 | 14.7 | 17.3 | 21.7 | 20.4 | 21.0 | 22.2 | 21.5 | 23.0 |
| 1987 | 13.6 | 15.1 | 14.9 | 14.4 | 16.7 | 20.8 | 19.5 | 20.0 | 21.0 | 20.2 | 21.3 |
| 1988 | 13.6 | 15.0 | 14.8 | 14.3 | 16.5 | 20.3 | 19.0 | 19.4 | 20.3 | 19.5 | 20.5 |
| 1989 | 13.6 | 14.9 | 14.8 | 14.3 | 16.3 | 19.8 | 18.6 | 19.0 | 19.7 | 19.0 | 19.8 |
| 1990 | 12.0 | 13.1 | 12.9 | 12.3 | 14.1 | 17.2 | 15.9 | 16.0 | 16.5 | 15.5 | 15.9 |
| 1991 | 12.3 | 13.4 | 13.1 | 12.6 | 14.4 | 17.2 | 16.1 | 16.2 | 16.6 | 15.8 | 16.1 |
| 1992 | 11.9 | 13.0 | 12.7 | 12.2 | 13.8 | 16.5 | 15.4 | 15.4 | 15.8 | 15.0 | 15.2 |
| 1993 | 12.6 | 13.6 | 13.4 | 13.0 | 14.5 | 17.1 | 16.0 | 16.2 | 16.5 | 15.8 | 16.1 |
| 1994 | 12.6 | 13.5 | 13.3 | 12.9 | 14.4 | 16.8 | 15.8 | 15.9 | 16.3 | 15.5 | 15.8 |
| 1995 | 12.8 | 13.7 | 13.5 | 13.1 | 14.5 | 16.9 | 15.9 | 16.0 | 16.3 | 15.7 | 16.0 |
| 1996 | 12.8 | 13.7 | 13.6 | 13.2 | 14.5 | 16.8 | 15.9 | 16.0 | 16.3 | 15.6 | 15.9 |
| 1997 | 13.1 | 14.0 | 13.8 | 13.5 | 14.8 | 17.0 | 16.1 | 16.2 | 16.5 | 15.9 | 16.2 |
| 1998 | 13.8 | 14.7 | 14.5 | 14.2 | 15.5 | 17.6 | 16.8 | 17.0 | 17.3 | 16.8 | 17.0 |
| 1999 | 13.9 | 14.8 | 14.7 | 14.4 | 15.6 | 17.7 | 16.9 | 17.0 | 17.3 | 16.8 | 17.1 |
| 2000 | 13.1 | 13.9 | 13.7 | 13.4 | 14.6 | 16.5 | 15.7 | 15.8 | 16.0 | 15.5 | 15.7 |
| 2001 | 12.2 | 13.0 | 12.8 | 12.5 | 13.5 | 15.3 | 14.5 | 14.5 | 14.7 | 14.2 | 14.3 |
| 2002 | 11.1 | 11.7 | 11.5 | 11.2 | 12.2 | 13.8 | 13.0 | 12.9 | 13.0 | 12.5 | 12.5 |
| 2003 | 11.0 | 11.7 | 11.5 | 11.1 | 12.1 | 13.6 | 12.9 | 12.8 | 12.9 | 12.3 | 12.4 |
| 2004 | 10.9 | 11.5 | 11.3 | 11.0 | 11.9 | 13.4 | 12.6 | 12.6 | 12.7 | 12.1 | 12.1 |
| 2005 | 10.8 | 11.4 | 11.2 | 10.9 | 11.7 | 13.2 | 12.5 | 12.4 | 12.5 | 11.9 | 11.9 |
| 2006 | 11.0 | 11.6 | 11.4 | 11.1 | 12.0 | 13.4 | 12.7 | 12.7 | 12.7 | 12.2 | 12.2 |
| 2007 | 10.5 | 11.1 | 10.9 | 10.6 | 11.4 | 12.7 | 12.0 | 12.0 | 12.0 | 11.5 | 11.5 |
| 2008 | 9.4 | 9.9 | 9.7 | 9.4 | 10.1 | 11.4 | 10.6 | 10.5 | 10.5 | 10.0 | 10.0 |
| 2009 | 9.4 | 9.9 | 9.7 | 9.4 | 10.1 | 11.4 | 10.7 | 10.6 | 10.6 | 10.0 | 10.0 |
| 2010 | 9.4 | 9.9 | 9.7 | 9.3 | 10.0 | 11.2 | 10.5 | 10.4 | 10.4 | 9.9 | 9.9 |
| 2011 | 9.1 | 9.5 | 9.3 | 9.0 | 9.7 | 10.8 | 10.2 | 10.0 | 10.0 | 9.5 | 9.5 |
| 2012 | 9.2 | 9.6 | 9.4 | 9.1 | 9.8 | 10.9 | 10.3 | 10.1 | 10.1 | 9.7 | 9.6 |
| 2013 | 9.7 | 10.2 | 10.0 | 9.7 | 10.4 | 11.5 | 10.9 | 10.8 | 10.8 | 10.3 | 10.3 |
| 2014 | 9.8 | 10.3 | 10.1 | 9.8 | 10.5 | 11.6 | 11.0 | 10.9 | 10.9 | 10.5 | 10.4 |
| 2015 | 10.0 | 10.5 | 10.3 | 10.0 | 10.7 | 11.8 | 11.2 | 11.1 | 11.1 | 10.7 | 10.7 |
| 2016 | 9.9 | 10.4 | 10.2 | 9.9 | 10.5 | 11.6 | 11.0 | 10.9 | 10.9 | 10.5 | 10.5 |
| 2017 | 10.0 | 10.5 | 10.3 | 10.0 | 10.6 | 11.7 | 11.1 | 11.0 | 11.0 | 10.6 | 10.6 |
| 2018 | 9.8 | 10.2 | 10.1 | 9.8 | 10.4 | 11.4 | 10.8 | 10.7 | 10.8 | 10.4 | 10.3 |
| 2019 | 10.0 | 10.5 | 10.3 | 10.0 | 10.6 | 11.6 | 11.1 | 11.0 | 11.0 | 10.6 | 10.6 |
| 2020 | 10.1 | 10.5 | 10.4 | 10.1 | 10.7 | 11.7 | 11.1 | 11.1 | 11.1 | 10.7 | 10.7 |
| 2021 | 10.3 | 10.7 | 10.6 | 10.4 | 10.9 | 11.9 | 11.4 | 11.3 | 11.3 | 10.9 | 10.9 |
| 2022 | 9.9 | 10.3 | 10.1 | 9.9 | 10.4 | 11.3 | 10.8 | 10.7 | 10.7 | 10.4 | 10.3 |
| 2023 | 10.1 | 10.4 | 10.3 | 10.1 | 10.6 | 11.5 | 11.0 | 10.9 | 11.0 | 10.6 | 10.6 |
| 2024 | 10.4 | 10.8 | 10.6 | 10.4 | 11.0 | 11.8 | 11.4 | 11.3 | 11.3 | 11.0 | 11.0 |

| | 1970 | 1971 | 1972 | 1973 | 1974 | 1975 | 1976 | 1977 | 1978 | 1979 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1970 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1971 | 4.1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1972 | 10.0 | 20.6 | 22.9 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1973 | 3.4 | 7.7 | 2.8 | -14.1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1974 | -3.1 | -1.7 | -7.6 | -19.8 | -25.2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1975 | 2.8 | 5.2 | 2.2 | -3.9 | 1.6 | 38.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1976 | 4.4 | 6.6 | 4.4 | 0.3 | 5.6 | 25.5 | 14.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1977 | 5.1 | 7.2 | 5.4 | 2.2 | 6.8 | 20.3 | 12.2 | 10.5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1978 | 7.4 | 9.6 | 8.4 | 6.2 | 10.7 | 22.2 | 17.3 | 18.9 | 28.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1979 | 7.8 | 9.8 | 8.8 | 6.9 | 10.9 | 20.0 | 15.8 | 16.4 | 19.5 | 11.6 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1980 | 9.6 | 11.6 | 10.9 | 9.5 | 13.3 | 21.5 | 18.4 | 19.5 | 22.7 | 20.1 | 29.2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1981 | 8.5 | 10.2 | 9.4 | 8.0 | 11.1 | 17.6 | 14.5 | 14.6 | 15.6 | 11.7 | 11.8 | -3.2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1982 | 9.0 | 10.6 | 9.9 | 8.7 | 11.6 | 17.3 | 14.6 | 14.7 | 15.6 | 12.7 | 13.0 | 5.7 | 15.5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1983 | 10.0 | 11.6 | 11.0 | 10.0 | 12.7 | 18.0 | 15.7 | 15.9 | 16.9 | 14.8 | 15.6 | 11.4 | 19.5 | 23.6 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1984 | 10.2 | 11.6 | 11.2 | 10.2 | 12.7 | 17.5 | 15.4 | 15.6 | 16.3 | 14.5 | 15.0 | 11.7 | 17.2 | 18.1 | 12.9 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1985 | 12.3 | 13.9 | 13.6 | 12.9 | 15.5 | 20.1 | 18.5 | 19.0 | 20.1 | 19.0 | 20.3 | 18.6 | 24.7 | 28.0 | 30.2 | 50.2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1986 | 13.9 | 15.4 | 15.2 | 14.7 | 17.3 | 21.7 | 20.4 | 21.0 | 22.2 | 21.5 | 23.0 | 22.0 | 27.8 | 31.1 | 33.7 | 45.6 | 41.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1987 | 13.6 | 15.1 | 14.9 | 14.4 | 16.7 | 20.8 | 19.5 | 20.0 | 21.0 | 20.2 | 21.3 | 20.3 | 24.7 | 26.6 | 27.4 | 32.6 | 24.6 | 10.1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1988 | 13.6 | 15.0 | 14.8 | 14.3 | 16.5 | 20.3 | 19.0 | 19.4 | 20.3 | 19.5 | 20.5 | 19.4 | 23.0 | 24.4 | 24.5 | 27.6 | 20.8 | 11.8 | 13.6 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1989 | 13.6 | 14.9 | 14.8 | 14.3 | 16.3 | 19.8 | 18.6 | 19.0 | 19.7 | 19.0 | 19.8 | 18.8 | 21.8 | 22.8 | 22.6 | 24.7 | 19.0 | 12.5 | 13.7 | 13.7 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1990 | 12.0 | 13.1 | 12.9 | 12.3 | 14.1 | 17.2 | 15.9 | 16.0 | 16.5 | 15.5 | 15.9 | 14.7 | 16.8 | 17.0 | 16.1 | 16.7 | 10.9 | 4.4 | 2.6 | -2.5 | -16.4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1991 | 12.3 | 13.4 | 13.1 | 12.6 | 14.4 | 17.2 | 16.1 | 16.2 | 16.6 | 15.8 | 16.1 | 15.0 | 17.0 | 17.2 | 16.4 | 16.9 | 12.1 | 7.1 | 6.4 | 4.1 | -0.4 | 18.5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1992 | 11.9 | 13.0 | 12.7 | 12.2 | 13.8 | 16.5 | 15.4 | 15.4 | 15.8 | 15.0 | 15.2 | 14.1 | 15.8 | 15.9 | 15.1 | 15.3 | 11.0 | 6.7 | 6.1 | 4.2 | 1.3 | 11.4 | 4.8 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1993 | 12.6 | 13.6 | 13.4 | 13.0 | 14.5 | 17.1 | 16.0 | 16.2 | 16.5 | 15.8 | 16.1 | 15.2 | 16.8 | 17.0 | 16.3 | 16.7 | 13.1 | 9.6 | 9.5 | 8.7 | 7.5 | 16.8 | 16.0 | 28.4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1994 | 12.6 | 13.5 | 13.3 | 12.9 | 14.4 | 16.8 | 15.8 | 15.9 | 16.3 | 15.5 | 15.8 | 14.9 | 16.4 | 16.5 | 15.9 | 16.2 | 12.9 | 9.9 | 9.8 | 9.2 | 8.3 | 15.6 | 14.6 | 19.8 | 11.9 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995 | 12.8 | 13.7 | 13.5 | 13.1 | 14.5 | 16.9 | 15.9 | 16.0 | 16.3 | 15.7 | 16.0 | 15.1 | 16.6 | 16.6 | 16.1 | 16.4 | 13.4 | 10.7 | 10.8 | 10.4 | 9.9 | 16.0 | 15.4 | 19.2 | 14.9 | 18.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1996 | 12.8 | 13.7 | 13.6 | 13.2 | 14.5 | 16.8 | 15.9 | 16.0 | 16.3 | 15.6 | 15.9 | 15.1 | 16.4 | 16.5 | 16.0 | 16.2 | 13.5 | 11.1 | 11.2 | 10.9 | 10.5 | 15.8 | 15.2 | 18.0 | 14.8 | 16.3 | 14.6 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997 | 13.1 | 14.0 | 13.8 | 13.5 | 14.8 | 17.0 | 16.1 | 16.2 | 16.5 | 15.9 | 16.2 | 15.4 | 16.7 | 16.8 | 16.3 | 16.6 | 14.2 | 12.0 | 12.2 | 12.0 | 11.8 | 16.6 | 16.2 | 18.7 | 16.4 | 17.9 | 17.9 | 21.3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1998 | 13.8 | 14.7 | 14.5 | 14.2 | 15.5 | 17.6 | 16.8 | 17.0 | 17.3 | 16.8 | 17.0 | 16.4 | 17.7 | 17.8 | 17.4 | 17.8 | 15.6 | 13.7 | 14.0 | 14.1 | 14.1 | 18.6 | 18.6 | 21.1 | 19.7 | 21.7 | 23.0 | 27.5 | 33.9 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1999 | 13.9 | 14.8 | 14.7 | 14.4 | 15.6 | 17.7 | 16.9 | 17.0 | 17.3 | 16.8 | 17.1 | 16.5 | 17.7 | 17.8 | 17.5 | 17.8 | 15.8 | 14.0 | 14.4 | 14.4 | 14.5 | 18.6 | 18.6 | 20.7 | 19.5 | 21.1 | 21.9 | 24.4 | 25.9 | 18.4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2000 | 13.1 | 13.9 | 13.7 | 13.4 | 14.6 | 16.5 | 15.7 | 15.8 | 16.0 | 15.5 | 15.7 | 15.0 | 16.1 | 16.1 | 15.7 | 15.9 | 13.9 | 12.1 | 12.3 | 12.2 | 12.1 | 15.4 | 15.0 | 16.4 | 14.8 | 15.3 | 14.7 | 14.8 | 12.7 | 3.3 | -9.9 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2001 | 12.2 | 13.0 | 12.8 | 12.5 | 13.5 | 15.3 | 14.5 | 14.5 | 14.7 | 14.2 | 14.3 | 13.6 | 14.5 | 14.5 | 14.0 | 14.1 | 12.1 | 10.4 | 10.4 | 10.2 | 9.9 | 12.7 | 12.1 | 12.9 | 11.1 | 11.0 | 9.9 | 9.0 | 6.1 | -1.8 | -10.6 | -11.3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2002 | 11.1 | 11.7 | 11.5 | 11.2 | 12.2 | 13.8 | 13.0 | 12.9 | 13.0 | 12.5 | 12.5 | 11.8 | 12.6 | 12.4 | 11.9 | 11.8 | 9.9 | 8.2 | 8.0 | 7.7 | 7.2 | 9.4 | 8.7 | 9.1 | 7.1 | 6.5 | 5.0 | 3.4 | 0.2 | -6.8 | -14.0 | -15.9 | -20.4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2003 | 11.0 | 11.7 | 11.5 | 11.1 | 12.1 | 13.6 | 12.9 | 12.8 | 12.9 | 12.3 | 12.4 | 11.7 | 12.4 | 12.3 | 11.7 | 11.7 | 9.8 | 8.2 | 8.1 | 7.8 | 7.4 | 9.4 | 8.7 | 9.1 | 7.3 | 6.8 | 5.5 | 4.3 | 1.7 | -3.8 | -8.6 | -8.2 | -6.7 | 9.4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2004 | 10.9 | 11.5 | 11.3 | 11.0 | 11.9 | 13.4 | 12.6 | 12.6 | 12.7 | 12.1 | 12.1 | 11.5 | 12.2 | 12.0 | 11.5 | 11.4 | 9.7 | 8.2 | 8.1 | 7.7 | 7.3 | 9.3 | 8.6 | 8.9 | 7.3 | 6.8 | 5.7 | 4.6 | 2.4 | -2.1 | -5.7 | -4.7 | -2.4 | 8.1 | 6.9 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2005 | 10.8 | 11.4 | 11.2 | 10.9 | 11.7 | 13.2 | 12.5 | 12.4 | 12.5 | 11.9 | 11.9 | 11.3 | 12.0 | 11.8 | 11.3 | 11.2 | 9.6 | 8.1 | 8.0 | 7.7 | 7.3 | 9.1 | 8.5 | 8.8 | 7.3 | 6.9 | 5.8 | 4.9 | 3.0 | -0.8 | -3.7 | -2.4 | 0.0 | 7.8 | 7.1 | 7.3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2006 | 11.0 | 11.6 | 11.4 | 11.1 | 12.0 | 13.4 | 12.7 | 12.7 | 12.7 | 12.2 | 12.2 | 11.6 | 12.3 | 12.1 | 11.7 | 11.6 | 10.0 | 8.7 | 8.6 | 8.3 | 8.0 | 9.8 | 9.2 | 9.5 | 8.2 | 7.9 | 7.1 | 6.3 | 4.8 | 1.6 | -0.6 | 1.1 | 3.7 | 10.8 | 11.3 | 13.5 | 20.2 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2007 | 10.5 | 11.1 | 10.9 | 10.6 | 11.4 | 12.7 | 12.0 | 12.0 | 12.0 | 11.5 | 11.5 | 10.9 | 11.5 | 11.3 | 10.8 | 10.7 | 9.2 | 7.9 | 7.8 | 7.5 | 7.1 | 8.7 | 8.1 | 8.4 | 7.0 | 6.7 | 5.8 | 5.0 | 3.5 | 0.6 | -1.4 | -0.2 | 1.8 | 7.0 | 6.4 | 6.2 | 5.7 | -7.1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2008 | 9.4 | 9.9 | 9.7 | 9.4 | 10.1 | 11.4 | 10.6 | 10.5 | 10.5 | 10.0 | 10.0 | 9.3 | 9.8 | 9.6 | 9.1 | 8.9 | 7.4 | 6.1 | 5.9 | 5.5 | 5.1 | 6.5 | 5.8 | 5.9 | 4.5 | 4.0 | 3.0 | 2.1 | 0.5 | -2.4 | -4.4 | -3.7 | -2.6 | 0.7 | -0.9 | -2.8 | -5.9 | -16.7 | -25.4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2009 | 9.4 | 9.9 | 9.7 | 9.4 | 10.1 | 11.4 | 10.7 | 10.6 | 10.6 | 10.0 | 10.0 | 9.4 | 9.9 | 9.7 | 9.2 | 9.0 | 7.6 | 6.3 | 6.1 | 5.8 | 5.4 | 6.7 | 6.1 | 6.2 | 4.9 | 4.5 | 3.6 | 2.8 | 1.3 | -1.2 | -3.0 | -2.2 | -1.0 | 2.2 | 1.0 | -0.1 | -1.9 | -8.3 | -9.0 | 11.1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2010 | 9.4 | 9.9 | 9.7 | 9.3 | 10.0 | 11.2 | 10.5 | 10.4 | 10.4 | 9.9 | 9.9 | 9.3 | 9.7 | 9.5 | 9.1 | 8.9 | 7.5 | 6.3 | 6.1 | 5.8 | 5.5 | 6.7 | 6.1 | 6.2 | 5.0 | 4.6 | 3.7 | 3.0 | 1.7 | -0.6 | -2.2 | -1.3 | -0.2 | 2.7 | 1.8 | 0.9 | -0.3 | -4.8 | -4.1 | 8.7 | 6.5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2011 | 9.1 | 9.5 | 9.3 | 9.0 | 9.7 | 10.8 | 10.2 | 10.0 | 10.0 | 9.5 | 9.5 | 8.9 | 9.3 | 9.1 | 8.6 | 8.5 | 7.1 | 5.9 | 5.8 | 5.4 | 5.1 | 6.2 | 5.6 | 5.7 | 4.6 | 4.1 | 3.3 | 2.6 | 1.4 | -0.7 | -2.2 | -1.5 | -0.4 | 2.1 | 1.2 | 0.4 | -0.7 | -4.4 | -3.7 | 4.8 | 1.8 | -2.7 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2012 | 9.2 | 9.6 | 9.4 | 9.1 | 9.8 | 10.9 | 10.3 | 10.1 | 10.1 | 9.7 | 9.6 | 9.0 | 9.5 | 9.3 | 8.8 | 8.7 | 7.4 | 6.2 | 6.1 | 5.8 | 5.4 | 6.6 | 6.0 | 6.1 | 5.0 | 4.7 | 3.9 | 3.3 | 2.2 | 0.2 | -1.0 | -0.3 | 0.8 | 3.2 | 2.5 | 2.0 | 1.3 | -1.6 | -0.4 | 7.0 | 5.7 | 5.3 | 14.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2013 | 9.7 | 10.2 | 10.0 | 9.7 | 10.4 | 11.5 | 10.9 | 10.8 | 10.8 | 10.3 | 10.3 | 9.8 | 10.2 | 10.0 | 9.6 | 9.5 | 8.3 | 7.2 | 7.1 | 6.8 | 6.6 | 7.7 | 7.2 | 7.3 | 6.4 | 6.1 | 5.5 | 5.0 | 4.0 | 2.3 | 1.2 | 2.1 | 3.3 | 5.8 | 5.5 | 5.3 | 5.1 | 3.1 | 4.9 | 12.3 | 12.6 | 14.7 | 24.4 | 35.9 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2014 | 9.8 | 10.3 | 10.1 | 9.8 | 10.5 | 11.6 | 11.0 | 10.9 | 10.9 | 10.5 | 10.4 | 9.9 | 10.3 | 10.2 | 9.8 | 9.7 | 8.5 | 7.5 | 7.4 | 7.1 | 6.9 | 8.0 | 7.6 | 7.7 | 6.8 | 6.5 | 6.0 | 5.5 | 4.6 | 3.0 | 2.1 | 3.0 | 4.2 | 6.6 | 6.3 | 6.2 | 6.1 | 4.5 | 6.3 | 12.7 | 13.0 | 14.7 | 21.2 | 25.0 | 15.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2015 | 10.0 | 10.5 | 10.3 | 10.0 | 10.7 | 11.8 | 11.2 | 11.1 | 11.1 | 10.7 | 10.7 | 10.2 | 10.6 | 10.5 | 10.1 | 10.0 | 8.8 | 7.9 | 7.8 | 7.6 | 7.4 | 8.4 | 8.0 | 8.2 | 7.3 | 7.1 | 6.6 | 6.2 | 5.4 | 4.0 | 3.1 | 4.0 | 5.2 | 7.5 | 7.3 | 7.4 | 7.4 | 6.1 | 7.8 | 13.7 | 14.1 | 15.7 | 20.8 | 23.2 | 17.3 | 19.5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2016 | 9.9 | 10.4 | 10.2 | 9.9 | 10.5 | 11.6 | 11.0 | 10.9 | 10.9 | 10.5 | 10.5 | 10.0 | 10.4 | 10.3 | 9.9 | 9.8 | 8.7 | 7.8 | 7.7 | 7.5 | 7.2 | 8.3 | 7.9 | 8.0 | 7.2 | 7.0 | 6.5 | 6.1 | 5.4 | 4.0 | 3.2 | 4.1 | 5.2 | 7.3 | 7.1 | 7.1 | 7.1 | 5.9 | 7.5 | 12.5 | 12.7 | 13.7 | 17.3 | 18.2 | 12.8 | 11.7 | 4.4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2017 | 10.0 | 10.5 | 10.3 | 10.0 | 10.6 | 11.7 | 11.1 | 11.0 | 11.0 | 10.6 | 10.6 | 10.1 | 10.5 | 10.4 | 10.0 | 10.0 | 8.9 | 8.0 | 7.9 | 7.7 | 7.5 | 8.5 | 8.1 | 8.3 | 7.5 | 7.3 | 6.9 | 6.5 | 5.8 | 4.5 | 3.8 | 4.7 | 5.8 | 7.8 | 7.7 | 7.7 | 7.8 | 6.7 | 8.2 | 12.7 | 13.0 | 13.9 | 16.9 | 17.5 | 13.3 | 12.8 | 9.6 | 15.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2018 | 9.8 | 10.2 | 10.1 | 9.8 | 10.4 | 11.4 | 10.8 | 10.7 | 10.8 | 10.4 | 10.3 | 9.9 | 10.2 | 10.1 | 9.7 | 9.6 | 8.6 | 7.7 | 7.6 | 7.5 | 7.2 | 8.2 | 7.8 | 8.0 | 7.2 | 7.0 | 6.6 | 6.2 | 5.6 | 4.3 | 3.6 | 4.4 | 5.4 | 7.3 | 7.1 | 7.2 | 7.2 | 6.1 | 7.4 | 11.4 | 11.4 | 12.1 | 14.4 | 14.4 | 10.6 | 9.5 | 6.3 | 7.3 | 0.1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2019 | 10.0 | 10.5 | 10.3 | 10.0 | 10.6 | 11.6 | 11.1 | 11.0 | 11.0 | 10.6 | 10.6 | 10.2 | 10.5 | 10.4 | 10.1 | 10.0 | 9.0 | 8.1 | 8.1 | 7.9 | 7.7 | 8.6 | 8.3 | 8.4 | 7.7 | 7.6 | 7.2 | 6.9 | 6.2 | 5.1 | 4.5 | 5.3 | 6.3 | 8.1 | 8.0 | 8.1 | 8.1 | 7.3 | 8.6 | 12.3 | 12.4 | 13.1 | 15.3 | 15.5 | 12.4 | 11.9 | 10.0 | 11.9 | 10.4 | 21.9 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2020 | 10.1 | 10.5 | 10.4 | 10.1 | 10.7 | 11.7 | 11.1 | 11.1 | 11.1 | 10.7 | 10.7 | 10.3 | 10.6 | 10.5 | 10.2 | 10.1 | 9.1 | 8.3 | 8.3 | 8.1 | 7.9 | 8.8 | 8.5 | 8.7 | 8.0 | 7.8 | 7.5 | 7.2 | 6.6 | 5.5 | 4.9 | 5.7 | 6.7 | 8.4 | 8.4 | 8.5 | 8.6 | 7.8 | 9.0 | 12.5 | 12.6 | 13.3 | 15.2 | 15.3 | 12.7 | 12.3 | 10.9 | 12.6 | 11.8 | 18.1 | 14.5 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2021 | 10.3 | 10.7 | 10.6 | 10.4 | 10.9 | 11.9 | 11.4 | 11.3 | 11.3 | 10.9 | 10.9 | 10.5 | 10.9 | 10.8 | 10.5 | 10.4 | 9.5 | 8.7 | 8.6 | 8.5 | 8.3 | 9.2 | 8.9 | 9.1 | 8.4 | 8.3 | 8.0 | 7.7 | 7.2 | 6.1 | 5.6 | 6.4 | 7.4 | 9.1 | 9.1 | 9.2 | 9.3 | 8.6 | 9.8 | 13.2 | 13.3 | 14.0 | 15.8 | 16.0 | 13.7 | 13.5 | 12.6 | 14.3 | 14.1 | 19.2 | 17.8 | 21.3 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2022 | 9.9 | 10.3 | 10.1 | 9.9 | 10.4 | 11.3 | 10.8 | 10.7 | 10.7 | 10.4 | 10.3 | 9.9 | 10.3 | 10.1 | 9.8 | 9.7 | 8.8 | 8.0 | 8.0 | 7.8 | 7.6 | 8.5 | 8.2 | 8.3 | 7.7 | 7.5 | 7.2 | 6.9 | 6.3 | 5.3 | 4.8 | 5.5 | 6.4 | 7.9 | 7.8 | 7.9 | 7.9 | 7.2 | 8.2 | 11.2 | 11.2 | 11.6 | 13.0 | 12.9 | 10.6 | 10.0 | 8.7 | 9.4 | 8.4 | 10.6 | 7.0 | 3.5 | -11.8 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2023 | 10.1 | 10.4 | 10.3 | 10.1 | 10.6 | 11.5 | 11.0 | 10.9 | 11.0 | 10.6 | 10.6 | 10.2 | 10.5 | 10.4 | 10.1 | 10.0 | 9.1 | 8.4 | 8.3 | 8.2 | 8.0 | 8.9 | 8.6 | 8.7 | 8.1 | 8.0 | 7.6 | 7.4 | 6.9 | 5.9 | 5.4 | 6.1 | 7.0 | 8.5 | 8.5 | 8.6 | 8.6 | 8.0 | 9.0 | 11.8 | 11.8 | 12.3 | 13.6 | 13.6 | 11.6 | 11.2 | 10.2 | 11.0 | 10.4 | 12.6 | 10.4 | 9.0 | 3.4 | 21.1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2024 | 10.4 | 10.8 | 10.6 | 10.4 | 11.0 | 11.8 | 11.4 | 11.3 | 11.3 | 11.0 | 11.0 | 10.6 | 10.9 | 10.8 | 10.5 | 10.5 | 9.6 | 8.9 | 8.9 | 8.7 | 8.6 | 9.4 | 9.2 | 9

# Dimensional Global Small Index

1970–2024 in CAD



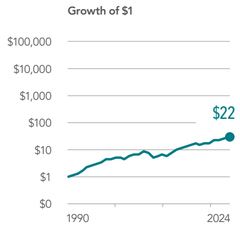



*See Sources and Descriptions of Data.*

| | 1970 | | |

## Dimensional Global Marketwide Value Index

1990–2024 in CAD

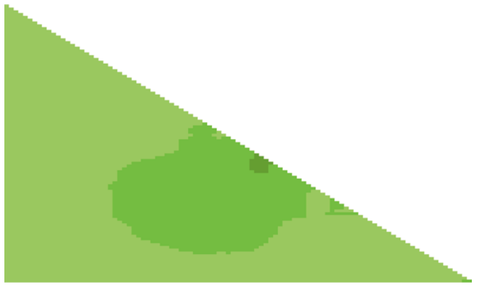


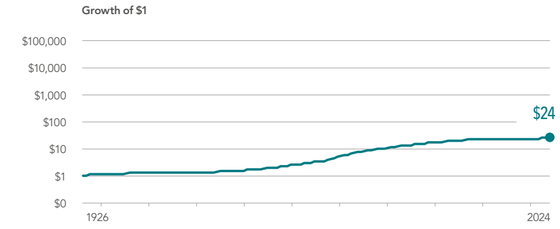

*See Sources and Descriptions of Data.*

| | 1990 | | |

# One-Month US Treasury Bills

1926–2024 in USD



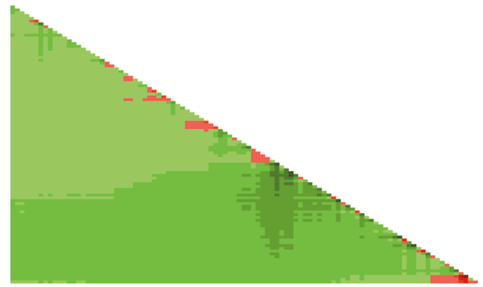


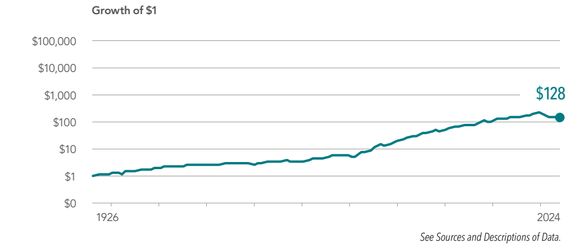

*See Sources and Descriptions of Data.*

| | 1926 | 1927 | 1928 | 1929 | 1930 | 1931 | 1932 | 1933 | 1934 | 1935 | 1936 | 1937 | 1938 | 1939 | 1940 | 1941 | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 | 1953 | 1954 | 1955 | 1956 | 1957 | 1958 | 1959 | 1960 | 1961 | 1962 | 1963 | 1964 | 1965 | 1966 | 1967 | 1968 | 1969 | 1970 | 1971 | 1972 | 1973 | 1974 | 1975 | 1976 | 1977 | 1978 | 1979 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---

# Dimensional US 20-Year Treasury Index

1926–2024 in USD



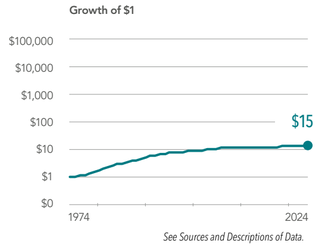



*See Sources and Descriptions of Data.*

| | 1926 | 1927 | 1928 | 1929 | 1930 | 1931 | 1932 | 1933 | 1934 | 1935 | 1936 | 1937 | 1938 | 1939 | 1940 | 1941 | 1942 | 1943 | 1944 | 1945 | 1946 | 1947 | 1948 | 1949 | 1950 | 1951 | 1952 | 1953 | 1954 | 1955 | 1956 | 1957 | 1958 | 1959 | 1960 | 1961 | 1962 | 1963 | 1964 | 1965 | 1966 | 1967 | 1968 | 1969 | 1970 | 1971 | 1972 | 1973 | 1974 | 1975 | 1976 | 1977 | 1978 | 1979 | 1980 | 1981 | 1982 | 1983 | 1984 | 1985 | 1986 | 1987 | 1988 | 1989 | 1990 | 1991 | 1992 | 1993 | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---

# FTSE Canada 30-Day Treasury Bills

1974–2024 in CAD




*See Sources and Descriptions of Data.*

| | 1974 | | |

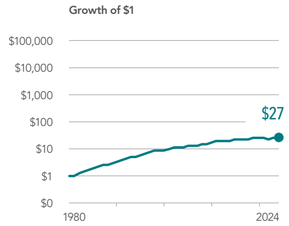
# FTSE Canada Long-Term Bond Index

1948–2024 in CAD

| | 1948 | | |

# FTSE Canada Universe Bond Index

1980–2024 in CAD

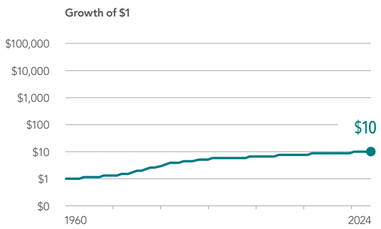



*See Sources and Descriptions of Data.*

| | 1980 | | |

# Inflation: Canadian Consumer Price Index

1960–2024 in CAD

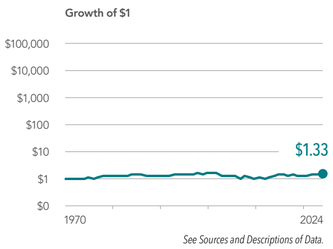



*See Sources and Descriptions of Data.*

| | 1960 | | |

# US Dollar vs. Canadian Dollar

1970–2024



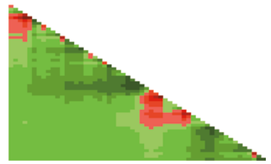

*See Sources and Descriptions of Data.*

| | 1970 | | |

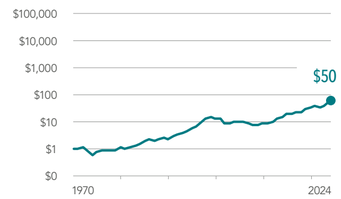
# S&P 500 Index

## Inflation Adjusted

1970–2024 in CAD



Growth of $1



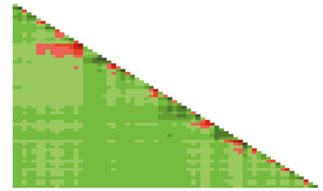

*See Sources and Descriptions of Data.*

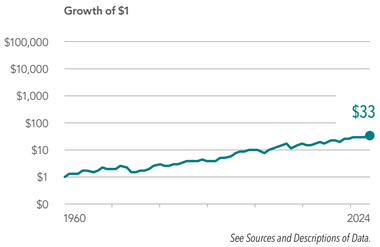
| | 1970 | | |

# S&P/TSX Composite Index

## Inflation Adjusted

1960–2024 in CAD





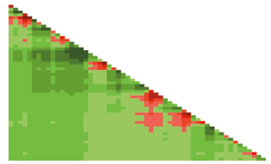

*See Sources and Descriptions of Data.*

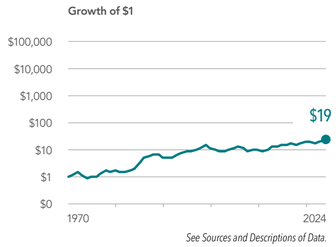
| | 1960 | | |

# MSCI EAFE Index

## Inflation Adjusted

1970–2024 in CAD





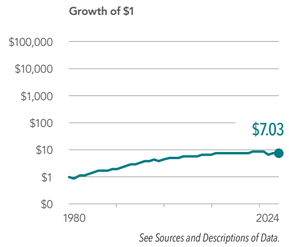

See Sources and Descriptions of Data.

| | 1970 | | |

# FTSE Canada Universe Bond Index

## Inflation Adjusted

1980–2024 in CAD




*See Sources and Descriptions of Data.*

| | 1980 | | |

# Dimensional Core Index Allocations

## WEIGHTS (%)

**The Dimensional Index Allocations represent Dimensional's research-driven, systematic approach to asset** allocation. The Core Index Allocations are constructed using mostly Dimensional indices and are designed to have a systematic emphasis on the reliable drivers of higher expected returns within equities and fixed income. The allocations may inform expectations about the performance of different asset allocations over time and about return deviations versus the market.

| EQUITY | 0% | 20% | 40% | 60% | 80% | 100% |
|---|---|---|---|---|---|---|
| Dimensional Canadian Core Equity Index | 0.0 | 6.4 | 12.8 | 19.2 | 25.6 | 32.0 |
| Dimensional US Core Equity Index (Canada) | 0.0 | 8.2 | 16.4 | 24.6 | 32.8 | 41.0 |
| Dimensional International Core Equity Index (Canada) | 0.0 | 4.6 | 9.2 | 13.8 | 18.4 | 23.0 |
| S&P Global REIT Index | 0.0 | 0.8 | 1.6 | 2.4 | 3.2 | 4.0 |
| **FIXED INCOME** | **100%** | **80%** | **60%** | **40%** | **20%** | **0%** |
| Dimensional Global Short-Term Government Variable Maturity Index (Hedged to CAD) | 100.0 | 60.0 | 40.0 | 25.0 | 5.0 | 0.0 |
| Dimensional Global Targeted Credit Index (Hedged to CAD) | 0.0 | 10.0 | 10.0 | 5.0 | 5.0 | 0.0 |
| Dimensional Global Adjusted Investment Grade Bond Index (Hedged to CAD) | 0.0 | 10.0 | 10.0 | 10.0 | 10.0 | 0.0 |

Weights as of December 31, 2024. Rebalanced monthly. Totals may not equal 100% due to rounding. For illustrative purposes only. The Index Allocations are unmanaged and are not subject to fees and expenses typically associated with managed accounts or investment funds. Indices are not available for direct investment. **Past performance is no guarantee of future results.**



# Dimensional Core Index Allocations

## SUMMARY STATISTICS

As of December 31, 2024

| EQUITY | 0% | 20% | 40% | 60% | 80% | 100% |
|---|---|---|---|---|---|---|
| **FIXED INCOME** | **100%** | **80%** | **60%** | **40%** | **20%** | **0%** |
| 1-Year Return (%) | 3.40 | 7.34 | 11.21 | 15.07 | 19.15 | 23.24 |
| 3-Year Annualized Return (%) | 0.30 | 2.24 | 4.21 | 6.10 | 8.05 | 10.16 |
| 5-Year Annualized Return (%) | 0.30 | 2.92 | 5.33 | 7.63 | 9.97 | 12.24 |
| 10-Year Annualized Return (%) | 0.93 | 3.31 | 5.33 | 7.23 | 9.20 | 10.91 |
| 15-Year Annualized Return (%) | 2.00 | 4.31 | 6.15 | 7.88 | 9.68 | 11.12 |
| 20-Year Annualized Return (%) | 2.63 | 4.38 | 5.76 | 7.03 | 8.32 | 9.35 |
| Annualized Return (%) 1994–2024 | 4.08 | 5.54 | 6.73 | 7.82 | 8.91 | 9.78 |
| Annualized Standard Deviation (%) 1994–2024 | 2.50 | 3.16 | 5.03 | 7.15 | 9.46 | 11.55 |
| Lowest 1-Year Return (%) | −7.96 (10/21–09/22) | −9.28 (10/21–09/22) | −13.58 (03/08–02/09) | −21.34 (03/08–02/09) | −29.05 (03/08–02/09) | −35.02 (03/08–02/09) |
| Lowest 3-Year Annualized Return (%) | −2.46 (03/20–02/23) | −0.42 (10/19–09/22) | −1.65 (03/06–02/09) | −4.87 (03/06–02/09) | −8.33 (03/06–02/09) | −11.09 (03/06–02/09) |
| Highest 1-Year Return (%) | 18.32 (01/95–12/95) | 17.82 (02/95–01/96) | 22.13 (03/09–02/10) | 29.55 (03/09–02/10) | 39.53 (04/20–03/21) | 49.10 (04/20–03/21) |
| Highest 3-Year Annualized Return (%) | 10.53 (01/95–12/97) | 11.83 (02/95–01/98) | 13.85 (03/95–02/98) | 16.14 (05/95–04/98) | 18.88 (04/03–03/06) | 22.74 (04/03–03/06) |
| Growth of $1 1994–2024 | 3.46 | 5.32 | 7.53 | 10.33 | 14.09 | 18.04 |

Assumes all strategies have been rebalanced monthly. Highest and lowest one-year and three-year returns are calculated from periods overlapping monthly. **Annualized standard deviation is calculated from monthly data. All performance results of the Index Allocations are based on performance of indices with backtested asset allocations; the performance was achieved with the benefit of hindsight; it does not represent actual investment strategies. The allocation's performance does not reflect advisory fees or other expenses associated with the management of an actual portfolio. There are limitations inherent in asset allocations. In particular, performance may not reflect the impact that economic and market factors may have had on the advisor's decision-making if the advisor were actually managing client money. Past performance is no guarantee of future results.**

# Dimensional Core Index Allocation

## 100% Fixed Income

1994–2024 in CAD

| | 1994 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1994 | -1.9 | 1995 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995 | 7.7 | 18.3 | 1996 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1996 | 7.9 | 13.1 | 8.1 | 1997 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997 | 7.3 | 10.5 | 6.8 | 5.6 | 1998 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1998 | 7.6 | 10.1 | 7.5 | 7.3 | 9.0 | 1999 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1999 | 7.1 | 9.0 | 6.8 | 6.4 | 6.8 | 4.6 | 2000 | | | | | | | | | | | | | | | | | | | | | | | |
| 2000 | 7.2 | 8.8 | 7.0 | 6.7 | 7.1 | 6.1 | 7.7 | 2001 | | | | | | | | | | | | | | | | | | | | | | |
| 2001 | 7.2 | 8.6 | 7.0 | 6.8 | 7.1 | 6.5 | 7.4 | 7.2 | 2002 | | | | | | | | | | | | | | | | | | | | | |
| 2002 | 7.3 | 8.6 | 7.2 | 7.1 | 7.4 | 7.0 | 7.8 | 7.9 | 8.6 | 2003 | | | | | | | | | | | | | | | | | | | | |
| 2003 | 7.0 | 8.1 | 6.8 | 6.7 | 6.8 | 6.4 | 6.9 | 6.6 | 6.4 | 4.2 | 2004 | | | | | | | | | | | | | | | | | | | |
| 2004 | 6.8 | 7.7 | 6.6 | 6.4 | 6.5 | 6.1 | 6.4 | 6.1 | 5.7 | 4.3 | 4.4 | 2005 | | | | | | | | | | | | | | | | | | |
| 2005 | 6.4 | 7.2 | 6.1 | 5.9 | 5.9 | 5.5 | 5.6 | 5.2 | 4.8 | 3.5 | 3.2 | 2.0 | 2006 | | | | | | | | | | | | | | | | | |
| 2006 | 6.1 | 6.8 | 5.8 | 5.6 | 5.6 | 5.2 | 5.3 | 4.9 | 4.5 | 3.5 | 3.2 | 2.6 | 3.2 | 2007 | | | | | | | | | | | | | | | | |
| 2007 | 6.1 | 6.7 | 5.8 | 5.6 | 5.6 | 5.3 | 5.3 | 5.0 | 4.7 | 3.9 | 3.8 | 3.7 | 4.5 | 5.8 | 2008 | | | | | | | | | | | | | | | |
| 2008 | 6.4 | 7.0 | 6.2 | 6.0 | 6.0 | 5.7 | 5.9 | 5.6 | 5.4 | 4.9 | 5.1 | 5.2 | 6.3 | 7.9 | 10.1 | 2009 | | | | | | | | | | | | | | |
| 2009 | 6.1 | 6.6 | 5.8 | 5.7 | 5.7 | 5.4 | 5.5 | 5.2 | 5.0 | 4.5 | 4.5 | 4.5 | 5.2 | 5.8 | 5.9 | 1.8 | 2010 | | | | | | | | | | | | | |
| 2010 | 6.0 | 6.6 | 5.8 | 5.7 | 5.7 | 5.4 | 5.5 | 5.2 | 5.0 | 4.6 | 4.7 | 4.7 | 5.3 | 5.8 | 5.8 | 3.7 | 5.6 | 2011 | | | | | | | | | | | | |
| 2011 | 6.1 | 6.6 | 5.9 | 5.7 | 5.7 | 5.5 | 5.6 | 5.4 | 5.2 | 4.8 | 4.9 | 5.0 | 5.5 | 5.9 | 6.0 | 4.6 | 6.0 | 6.5 | 2012 | | | | | | | | | | | |
| 2012 | 6.0 | 6.4 | 5.8 | 5.6 | 5.6 | 5.4 | 5.4 | 5.2 | 5.1 | 4.7 | 4.8 | 4.8 | 5.3 | 5.6 | 5.6 | 4.5 | 5.4 | 5.2 | 4.0 | 2013 | | | | | | | | | | |
| 2013 | 5.7 | 6.1 | 5.5 | 5.3 | 5.3 | 5.1 | 5.1 | 4.9 | 4.7 | 4.4 | 4.4 | 4.4 | 4.7 | 4.9 | 4.8 | 3.7 | 4.2 | 3.8 | 2.4 | 0.8 | 2014 | | | | | | | | | |
| 2014 | 5.6 | 6.0 | 5.4 | 5.2 | 5.2 | 5.0 | 5.0 | 4.8 | 4.7 | 4.3 | 4.4 | 4.4 | 4.6 | 4.8 | 4.7 | 3.8 | 4.2 | 3.8 | 2.9 | 2.4 | 4.0 | 2015 | | | | | | | | |
| 2015 | 5.5 | 5.8 | 5.2 | 5.1 | 5.1 | 4.8 | 4.8 | 4.7 | 4.5 | 4.2 | 4.2 | 4.2 | 4.4 | 4.5 | 4.3 | 3.6 | 3.8 | 3.5 | 2.8 | 2.3 | 3.1 | 2.2 | 2016 | | | | | | | |
| 2016 | 5.3 | 5.6 | 5.1 | 4.9 | 4.9 | 4.7 | 4.7 | 4.5 | 4.3 | 4.0 | 4.0 | 4.0 | 4.1 | 4.2 | 4.1 | 3.3 | 3.5 | 3.2 | 2.6 | 2.2 | 2.7 | 2.0 | 1.7 | 2017 | | | | | | |
| 2017 | 5.1 | 5.4 | 4.9 | 4.7 | 4.7 | 4.4 | 4.4 | 4.3 | 4.1 | 3.8 | 3.8 | 3.7 | 3.8 | 3.9 | 3.7 | 3.0 | 3.2 | 2.8 | 2.2 | 1.9 | 2.2 | 1.6 | 1.2 | 0.7 | 2018 | | | | | |
| 2018 | 4.9 | 5.2 | 4.7 | 4.5 | 4.5 | 4.2 | 4.2 | 4.0 | 3.9 | 3.6 | 3.5 | 3.5 | 3.6 | 3.6 | 3.4 | 2.8 | 2.9 | 2.6 | 2.0 | 1.7 | 1.8 | 1.3 | 1.0 | 0.6 | 0.6 | 2019 | | | | |
| 2019 | 4.8 | 5.1 | 4.6 | 4.4 | 4.4 | 4.2 | 4.1 | 4.0 | 3.8 | 3.5 | 3.5 | 3.4 | 3.5 | 3.5 | 3.4 | 2.8 | 2.9 | 2.6 | 2.1 | 1.8 | 2.0 | 1.6 | 1.4 | 1.3 | 1.6 | 2.6 | 2020 | | | |
| 2020 | 4.7 | 5.0 | 4.5 | 4.4 | 4.3 | 4.1 | 4.1 | 3.9 | 3.7 | 3.5 | 3.4 | 3.4 | 3.5 | 3.5 | 3.3 | 2.8 | 2.8 | 2.6 | 2.1 | 1.9 | 2.1 | 1.7 | 1.6 | 1.6 | 1.9 | 2.6 | 2.6 | 2021 | | |
| 2021 | 4.5 | 4.7 | 4.3 | 4.1 | 4.0 | 3.8 | 3.8 | 3.6 | 3.4 | 3.2 | 3.1 | 3.0 | 3.1 | 3.1 | 2.9 | 2.4 | 2.4 | 2.1 | 1.7 | 1.5 | 1.6 | 1.2 | 1.0 | 0.9 | 0.9 | 1.1 | 0.3 | -2.0 | 2022 | |
| 2022 | 4.1 | 4.3 | 3.8 | 3.7 | 3.6 | 3.4 | 3.3 | 3.1 | 2.9 | 2.7 | 2.6 | 2.5 | 2.5 | 2.5 | 2.2 | 1.7 | 1.7 | 1.4 | 0.9 | 0.6 | 0.6 | 0.2 | -0.1 | -0.4 | -0.6 | -0.9 | -2.1 | -4.4 | -6.7 | 2023 |
| 2023 | 4.1 | 4.3 | 3.8 | 3.7 | 3.6 | 3.4 | 3.4 | 3.2 | 3.0 | 2.7 | 2.7 | 2.6 | 2.6 | 2.6 | 2.4 | 1.9 | 1.9 | 1.6 | 1.2 | 1.0 | 1.0 | 0.7 | 0.5 | 0.3 | 0.2 | 0.1 | -0.5 | -1.5 | -1.2 | 4.6 |
| 2024 | 4.1 | 4.3 | 3.8 | 3.7 | 3.6 | 3.4 | 3.4 | 3.2 | 3.0 | 2.8 | 2.7 | 2.6 | 2.7 | 2.6 | 2.4 | 2.0 | 2.0 | 1.7 | 1.4 | 1.2 | 1.2 | 0.9 | 0.8 | 0.7 | 0.7 | 0.7 | 0.3 | -0.3 | 0.3 | 4.0 |
| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |

*See Sources and Descriptions of Data.*

# Dimensional Core Index Allocation

## 20% Equity, 80% Fixed Income

1994–2024 in CAD

| | 1994 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1994 | 0.3 | 1995 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995 | 8.4 | 17.1 | 1996 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1996 | 8.8 | 13.4 | 9.8 | 1997 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997 | 8.7 | 11.6 | 8.9 | 8.1 | 1998 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1998 | 9.0 | 11.2 | 9.4 | 9.2 | 10.2 | 1999 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1999 | 8.7 | 10.4 | 8.8 | 8.5 | 8.7 | 7.1 | 2000 | | | | | | | | | | | | | | | | | | | | | | | |
| 2000 | 8.4 | 9.9 | 8.5 | 8.2 | 8.2 | 7.1 | 7.2 | 2001 | | | | | | | | | | | | | | | | | | | | | | |
| 2001 | 8.2 | 9.3 | 8.1 | 7.8 | 7.7 | 6.8 | 6.7 | 6.2 | 2002 | | | | | | | | | | | | | | | | | | | | | |
| 2002 | 7.8 | 8.7 | 7.6 | 7.2 | 7.1 | 6.3 | 6.0 | 5.5 | 4.7 | 2003 | | | | | | | | | | | | | | | | | | | | |
| 2003 | 7.8 | 8.7 | 7.7 | 7.4 | 7.3 | 6.7 | 6.6 | 6.4 | 6.4 | 8.2 | 2004 | | | | | | | | | | | | | | | | | | | |
| 2004 | 7.7 | 8.5 | 7.5 | 7.3 | 7.1 | 6.6 | 6.5 | 6.4 | 6.4 | 7.3 | 6.5 | 2005 | | | | | | | | | | | | | | | | | | |
| 2005 | 7.4 | 8.1 | 7.2 | 7.0 | 6.8 | 6.3 | 6.2 | 6.0 | 6.0 | 6.4 | 5.5 | 4.6 | 2006 | | | | | | | | | | | | | | | | | |
| 2006 | 7.4 | 8.0 | 7.2 | 6.9 | 6.8 | 6.4 | 6.3 | 6.1 | 6.1 | 6.4 | 5.9 | 5.6 | 6.6 | 2007 | | | | | | | | | | | | | | | | |
| 2007 | 7.1 | 7.7 | 6.9 | 6.6 | 6.5 | 6.1 | 6.0 | 5.8 | 5.7 | 5.9 | 5.4 | 5.0 | 5.2 | 3.9 | 2008 | | | | | | | | | | | | | | | |
| 2008 | 6.5 | 7.0 | 6.3 | 6.0 | 5.8 | 5.3 | 5.1 | 4.9 | 4.7 | 4.7 | 4.0 | 3.4 | 3.0 | 1.3 | -1.3 | 2009 | | | | | | | | | | | | | | |
| 2009 | 6.7 | 7.2 | 6.5 | 6.2 | 6.1 | 5.7 | 5.6 | 5.4 | 5.3 | 5.4 | 4.9 | 4.6 | 4.6 | 3.9 | 3.9 | 9.4 | 2010 | | | | | | | | | | | | | |
| 2010 | 6.8 | 7.2 | 6.6 | 6.3 | 6.2 | 5.9 | 5.8 | 5.6 | 5.6 | 5.7 | 5.3 | 5.1 | 5.2 | 4.9 | 5.2 | 8.6 | 7.8 | 2011 | | | | | | | | | | | | |
| 2011 | 6.6 | 7.0 | 6.4 | 6.1 | 6.0 | 5.7 | 5.6 | 5.4 | 5.3 | 5.4 | 5.1 | 4.9 | 4.9 | 4.6 | 4.8 | 6.9 | 5.6 | 3.5 | 2012 | | | | | | | | | | | |
| 2012 | 6.6 | 7.0 | 6.4 | 6.2 | 6.1 | 5.8 | 5.7 | 5.6 | 5.5 | 5.6 | 5.4 | 5.2 | 5.3 | 5.1 | 5.3 | 7.0 | 6.3 | 5.5 | 7.5 | 2013 | | | | | | | | | | |
| 2013 | 6.6 | 7.0 | 6.4 | 6.2 | 6.1 | 5.8 | 5.8 | 5.7 | 5.6 | 5.7 | 5.4 | 5.3 | 5.4 | 5.3 | 5.5 | 6.9 | 6.3 | 5.8 | 6.9 | 6.2 | 2014 | | | | | | | | | |
| 2014 | 6.6 | 6.9 | 6.4 | 6.3 | 6.1 | 5.9 | 5.8 | 5.7 | 5.7 | 5.8 | 5.5 | 5.5 | 5.6 | 5.4 | 5.6 | 6.8 | 6.3 | 6.0 | 6.8 | 6.4 | 6.6 | 2015 | | | | | | | | |
| 2015 | 6.5 | 6.8 | 6.3 | 6.1 | 6.0 | 5.7 | 5.7 | 5.6 | 5.5 | 5.6 | 5.4 | 5.3 | 5.3 | 5.2 | 5.3 | 6.3 | 5.8 | 5.4 | 5.9 | 5.4 | 4.9 | 3.3 | 2016 | | | | | | | |
| 2016 | 6.4 | 6.7 | 6.2 | 6.0 | 5.9 | 5.7 | 5.6 | 5.5 | 5.5 | 5.5 | 5.3 | 5.2 | 5.3 | 5.2 | 5.3 | 6.1 | 5.7 | 5.3 | 5.7 | 5.3 | 4.9 | 4.1 | 4.9 | 2017 | | | | | | |
| 2017 | 6.3 | 6.6 | 6.1 | 5.9 | 5.8 | 5.6 | 5.5 | 5.4 | 5.4 | 5.4 | 5.2 | 5.1 | 5.2 | 5.0 | 5.1 | 5.9 | 5.4 | 5.1 | 5.4 | 5.0 | 4.6 | 4.0 | 4.4 | 3.8 | 2018 | | | | | |
| 2018 | 6.0 | 6.2 | 5.8 | 5.6 | 5.5 | 5.3 | 5.2 | 5.1 | 5.0 | 5.0 | 4.8 | 4.7 | 4.7 | 4.6 | 4.6 | 5.2 | 4.8 | 4.4 | 4.5 | 4.0 | 3.6 | 2.8 | 2.7 | 1.6 | -0.6 | 2019 | | | | |
| 2019 | 6.1 | 6.3 | 5.9 | 5.7 | 5.6 | 5.4 | 5.3 | 5.2 | 5.1 | 5.2 | 5.0 | 4.9 | 4.9 | 4.8 | 4.8 | 5.4 | 5.0 | 4.7 | 4.8 | 4.5 | 4.2 | 3.7 | 3.8 | 3.4 | 3.2 | 7.3 | 2020 | | | |
| 2020 | 6.0 | 6.2 | 5.8 | 5.7 | 5.6 | 5.4 | 5.3 | 5.2 | 5.1 | 5.1 | 5.0 | 4.9 | 4.9 | 4.8 | 4.8 | 5.4 | 5.0 | 4.7 | 4.9 | 4.5 | 4.3 | 3.9 | 4.1 | 3.8 | 3.9 | 6.2 | 5.1 | 2021 | | |
| 2021 | 5.9 | 6.1 | 5.7 | 5.6 | 5.4 | 5.2 | 5.2 | 5.1 | 5.0 | 5.0 | 4.9 | 4.8 | 4.8 | 4.6 | 4.7 | 5.2 | 4.8 | 4.6 | 4.7 | 4.4 | 4.1 | 3.8 | 3.9 | 3.6 | 3.6 | 5.0 | 4.0 | 2.8 | 2022 | |
| 2022 | 5.4 | 5.6 | 5.2 | 5.0 | 4.9 | 4.7 | 4.6 | 4.5 | 4.4 | 4.4 | 4.2 | 4.0 | 4.0 | 3.8 | 3.8 | 4.2 | 3.8 | 3.5 | 3.5 | 3.1 | 2.7 | 2.3 | 2.1 | 1.7 | 1.3 | 1.7 | 0.0 | -2.5 | -7.6 | 2023 |
| 2023 | 5.5 | 5.7 | 5.3 | 5.1 | 5.0 | 4.8 | 4.7 | 4.6 | 4.5 | 4.5 | 4.3 | 4.2 | 4.2 | 4.1 | 4.1 | 4.4 | 4.1 | 3.8 | 3.8 | 3.5 | 3.2 | 2.9 | 2.8 | 2.5 | 2.3 | 2.9 | 1.8 | 0.8 | -0.2 | 7.7 |
| 2024 | 5.5 | 5.7 | 5.3 | 5.2 | 5.1 | 4.9 | 4.8 | 4.7 | 4.6 | 4.6 | 4.5 | 4.4 | 4.4 | 4.2 | 4.3 | 4.6 | 4.3 | 4.1 | 4.1 | 3.8 | 3.6 | 3.3 | 3.3 | 3.1 | 3.0 | 3.6 | 2.9 | 2.4 | 2.2 | 7.5 |
| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |

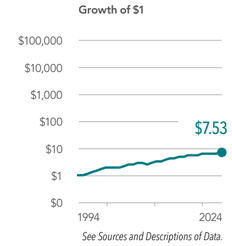
*See Sources and Descriptions of Data.*



# Dimensional Core Index Allocation

## 40% Equity, 60% Fixed Income

1994–2024 in CAD



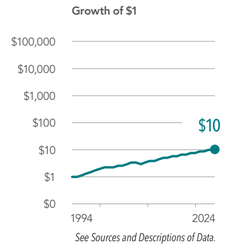

*See Sources and Descriptions of Data.*

| | 1994 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1994 | 2.3 | 1995 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995 | 9.1 | 16.3 | 1996 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1996 | 10.0 | 14.1 | 12.0 | 1997 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997 | 10.2 | 12.9 | 11.3 | 10.6 | 1998 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1998 | 10.5 | 12.6 | 11.4 | 11.1 | 11.5 | 1999 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1999 | 10.4 | 12.1 | 11.1 | 10.7 | 10.8 | 10.1 | 2000 | | | | | | | | | | | | | | | | | | | | | | | |
| 2000 | 9.8 | 11.2 | 10.2 | 9.7 | 9.4 | 8.4 | 6.6 | 2001 | | | | | | | | | | | | | | | | | | | | | | |
| 2001 | 9.2 | 10.2 | 9.2 | 8.7 | 8.2 | 7.1 | 5.7 | 4.8 | 2002 | | | | | | | | | | | | | | | | | | | | | |
| 2002 | 8.2 | 9.0 | 8.0 | 7.3 | 6.7 | 5.5 | 4.0 | 2.7 | 0.8 | 2003 | | | | | | | | | | | | | | | | | | | | |
| 2003 | 8.5 | 9.2 | 8.4 | 7.9 | 7.4 | 6.6 | 5.8 | 5.5 | 5.9 | 11.2 | 2004 | | | | | | | | | | | | | | | | | | | |
| 2004 | 8.5 | 9.1 | 8.4 | 7.9 | 7.6 | 6.9 | 6.3 | 6.2 | 6.7 | 9.8 | 8.3 | 2005 | | | | | | | | | | | | | | | | | | |
| 2005 | 8.4 | 9.0 | 8.3 | 7.8 | 7.5 | 6.9 | 6.4 | 6.4 | 6.8 | 8.9 | 7.7 | 7.1 | 2006 | | | | | | | | | | | | | | | | | |
| 2006 | 8.5 | 9.0 | 8.4 | 8.1 | 7.8 | 7.3 | 6.9 | 7.0 | 7.4 | 9.1 | 8.4 | 8.5 | 9.9 | 2007 | | | | | | | | | | | | | | | | |
| 2007 | 8.1 | 8.5 | 7.9 | 7.5 | 7.2 | 6.8 | 6.4 | 6.3 | 6.6 | 7.8 | 6.9 | 6.5 | 6.2 | 2.5 | 2008 | | | | | | | | | | | | | | | |
| 2008 | 6.8 | 7.1 | 6.5 | 6.0 | 5.6 | 5.0 | 4.5 | 4.2 | 4.1 | 4.7 | 3.4 | 2.2 | 0.7 | -3.7 | -9.5 | 2009 | | | | | | | | | | | | | | |
| 2009 | 7.3 | 7.6 | 7.0 | 6.6 | 6.3 | 5.9 | 5.4 | 5.3 | 5.4 | 6.0 | 5.2 | 4.6 | 4.0 | 2.1 | 1.8 | 14.5 | 2010 | | | | | | | | | | | | | |
| 2010 | 7.4 | 7.7 | 7.2 | 6.8 | 6.6 | 6.2 | 5.8 | 5.7 | 5.8 | 6.5 | 5.8 | 5.4 | 5.1 | 3.9 | 4.4 | 12.1 | 9.6 | 2011 | | | | | | | | | | | | |
| 2011 | 7.0 | 7.3 | 6.8 | 6.5 | 6.2 | 5.8 | 5.4 | 5.3 | 5.3 | 5.9 | 5.2 | 4.8 | 4.4 | 3.3 | 3.5 | 8.3 | 5.2 | 1.0 | 2012 | | | | | | | | | | | |
| 2012 | 7.2 | 7.4 | 6.9 | 6.6 | 6.4 | 6.0 | 5.7 | 5.6 | 5.7 | 6.2 | 5.7 | 5.3 | 5.1 | 4.3 | 4.6 | 8.5 | 6.6 | 5.1 | 9.2 | 2013 | | | | | | | | | | |
| 2013 | 7.4 | 7.6 | 7.2 | 6.9 | 6.7 | 6.3 | 6.1 | 6.0 | 6.1 | 6.6 | 6.2 | 6.0 | 5.8 | 5.3 | 5.7 | 9.0 | 7.7 | 7.1 | 10.2 | 11.3 | 2014 | | | | | | | | | |
| 2014 | 7.4 | 7.7 | 7.2 | 7.0 | 6.8 | 6.5 | 6.2 | 6.2 | 6.3 | 6.8 | 6.4 | 6.2 | 6.1 | 5.6 | 6.1 | 8.9 | 7.8 | 7.4 | 9.6 | 9.8 | 8.3 | 2015 | | | | | | | | |
| 2015 | 7.3 | 7.5 | 7.1 | 6.8 | 6.6 | 6.3 | 6.1 | 6.1 | 6.2 | 6.6 | 6.2 | 6.0 | 5.9 | 5.5 | 5.9 | 8.3 | 7.2 | 6.8 | 8.3 | 7.9 | 6.3 | 4.4 | 2016 | | | | | | | |
| 2016 | 7.3 | 7.5 | 7.1 | 6.9 | 6.7 | 6.4 | 6.2 | 6.2 | 6.3 | 6.7 | 6.3 | 6.1 | 6.1 | 5.7 | 6.0 | 8.1 | 7.3 | 6.9 | 8.1 | 7.8 | 6.7 | 5.9 | 7.4 | 2017 | | | | | | |
| 2017 | 7.2 | 7.4 | 7.1 | 6.8 | 6.6 | 6.4 | 6.2 | 6.2 | 6.3 | 6.6 | 6.3 | 6.2 | 6.1 | 5.7 | 6.1 | 7.9 | 7.1 | 6.8 | 7.8 | 7.5 | 6.6 | 6.0 | 6.8 | 6.3 | 2018 | | | | | |
| 2018 | 6.9 | 7.0 | 6.7 | 6.4 | 6.2 | 6.0 | 5.8 | 5.7 | 5.8 | 6.1 | 5.8 | 5.6 | 5.5 | 5.1 | 5.3 | 6.9 | 6.1 | 5.7 | 6.4 | 5.9 | 4.9 | 4.0 | 3.9 | 2.2 | -1.7 | 2019 | | | | |
| 2019 | 7.0 | 7.2 | 6.8 | 6.6 | 6.4 | 6.2 | 6.0 | 6.0 | 6.0 | 6.4 | 6.1 | 5.9 | 5.8 | 5.5 | 5.8 | 7.3 | 6.6 | 6.2 | 6.9 | 6.6 | 5.8 | 5.3 | 5.6 | 5.0 | 4.3 | 10.7 | 2020 | | | |
| 2020 | 7.0 | 7.2 | 6.8 | 6.6 | 6.4 | 6.2 | 6.0 | 6.0 | 6.1 | 6.4 | 6.1 | 5.9 | 5.9 | 5.6 | 5.8 | 7.2 | 6.6 | 6.3 | 6.9 | 6.6 | 5.9 | 5.5 | 5.7 | 5.3 | 5.0 | 8.6 | 6.5 | 2021 | | |
| 2021 | 7.0 | 7.2 | 6.8 | 6.6 | 6.5 | 6.3 | 6.1 | 6.1 | 6.1 | 6.4 | 6.2 | 6.0 | 6.0 | 5.7 | 5.9 | 7.2 | 6.6 | 6.4 | 6.9 | 6.7 | 6.1 | 5.8 | 6.0 | 5.8 | 5.6 | 8.2 | 7.0 | 7.6 | 2022 | |
| 2022 | 6.5 | 6.6 | 6.3 | 6.1 | 5.9 | 5.7 | 5.5 | 5.4 | 5.4 | 5.7 | 5.4 | 5.2 | 5.1 | 4.8 | 5.0 | 6.1 | 5.5 | 5.1 | 5.5 | 5.2 | 4.5 | 4.0 | 4.0 | 3.4 | 2.9 | 4.1 | 1.9 | -0.3 | -7.5 | 2023 |
| 2023 | 6.6 | 6.7 | 6.4 | 6.2 | 6.0 | 5.8 | 5.6 | 5.6 | 5.6 | 5.9 | 5.6 | 5.5 | 5.4 | 5.1 | 5.3 | 6.4 | 5.8 | 5.5 | 5.9 | 5.6 | 5.0 | 4.7 | 4.7 | 4.4 | 4.0 | 5.2 | 3.9 | 3.1 | 0.9 | 10.0 |
| 2024 | 6.7 | 6.9 | 6.6 | 6.4 | 6.2 | 6.0 | 5.9 | 5.8 | 5.9 | 6.1 | 5.9 | 5.8 | 5.7 | 5.5 | 5.6 | 6.7 | 6.2 | 5.9 | 6.3 | 6.1 | 5.6 | 5.3 | 5.4 | 5.2 | 5.0 | 6.2 | 5.3 | 5.0 | 4.2 | 10.6 |
| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |

# Dimensional Core Index Allocation

## 60% Equity, 40% Fixed Income

1994–2024 in CAD




*See Sources and Descriptions of Data.*

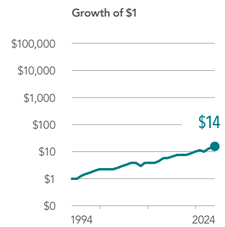
| | 1994 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1994 | 4.2 | 1995 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995 | 9.8 | 15.7 | 1996 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1996 | 11.3 | 15.1 | 14.4 | 1997 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997 | 11.8 | 14.4 | 13.8 | 13.2 | 1998 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1998 | 12.0 | 14.0 | 13.5 | 13.0 | 12.8 | 1999 | | | | | | | | | | | | | | | | | | | | | | | |
| 1999 | 12.2 | 13.9 | 13.4 | 13.1 | 13.0 | 13.2 | 2000 | | | | | | | | | | | | | | | | | | | | | | |
| 2000 | 11.3 | 12.5 | 11.9 | 11.3 | 10.7 | 9.6 | 6.1 | 2001 | | | | | | | | | | | | | | | | | | | | | |
| 2001 | 10.2 | 11.1 | 10.4 | 9.6 | 8.7 | 7.4 | 4.6 | 3.1 | 2002 | | | | | | | | | | | | | | | | | | | | |
| 2002 | 8.7 | 9.2 | 8.4 | 7.4 | 6.3 | 4.7 | 2.0 | 0.0 | -3.1 | 2003 | | | | | | | | | | | | | | | | | | | |
| 2003 | 9.2 | 9.8 | 9.0 | 8.3 | 7.5 | 6.5 | 4.8 | 4.4 | 5.1 | 14.0 | 2004 | | | | | | | | | | | | | | | | | | |
| 2004 | 9.3 | 9.8 | 9.2 | 8.5 | 7.9 | 7.1 | 5.9 | 5.8 | 6.8 | 12.0 | 10.2 | 2005 | | | | | | | | | | | | | | | | | |
| 2005 | 9.3 | 9.8 | 9.2 | 8.7 | 8.1 | 7.5 | 6.5 | 6.6 | 7.5 | 11.3 | 10.0 | 9.8 | 2006 | | | | | | | | | | | | | | | | |
| 2006 | 9.6 | 10.1 | 9.6 | 9.1 | 8.7 | 8.2 | 7.5 | 7.7 | 8.6 | 11.8 | 11.0 | 11.5 | 13.2 | 2007 | | | | | | | | | | | | | | | |
| 2007 | 9.0 | 9.4 | 8.9 | 8.4 | 7.9 | 7.4 | 6.7 | 6.7 | 7.4 | 9.6 | 8.5 | 8.0 | 7.1 | 1.2 | 2008 | | | | | | | | | | | | | | |
| 2008 | 7.1 | 7.3 | 6.7 | 6.0 | 5.4 | 4.7 | 3.8 | 3.5 | 3.6 | 4.7 | 3.0 | 1.3 | -1.4 | -8.0 | -16.5 | 2009 | | | | | | | | | | | | | |
| 2009 | 7.8 | 8.0 | 7.5 | 7.0 | 6.5 | 5.9 | 5.2 | 5.1 | 5.4 | 6.6 | 5.4 | 4.5 | 3.3 | 0.1 | -0.4 | 18.7 | 2010 | | | | | | | | | | | | |
| 2010 | 8.0 | 8.2 | 7.7 | 7.3 | 6.8 | 6.3 | 5.7 | 5.7 | 6.0 | 7.2 | 6.3 | 5.6 | 4.8 | 2.8 | 3.4 | 15.0 | 11.3 | 2011 | | | | | | | | | | | |
| 2011 | 7.4 | 7.6 | 7.2 | 6.7 | 6.2 | 5.7 | 5.1 | 5.1 | 5.3 | 6.2 | 5.3 | 4.6 | 3.8 | 2.0 | 2.2 | 9.3 | 4.8 | -1.3 | 2012 | | | | | | | | | | |
| 2012 | 7.6 | 7.8 | 7.3 | 6.9 | 6.5 | 6.1 | 5.5 | 5.5 | 5.7 | 6.6 | 5.9 | 5.3 | 4.7 | 3.4 | 3.8 | 9.6 | 6.7 | 4.4 | 10.4 | 2013 | | | | | | | | | |
| 2013 | 8.0 | 8.2 | 7.8 | 7.4 | 7.1 | 6.7 | 6.3 | 6.3 | 6.6 | 7.5 | 6.9 | 6.5 | 6.1 | 5.1 | 5.8 | 10.9 | 9.0 | 8.2 | 13.3 | 16.3 | 2014 | | | | | | | | |
| 2014 | 8.1 | 8.3 | 7.9 | 7.6 | 7.3 | 6.9 | 6.5 | 6.5 | 6.8 | 7.7 | 7.1 | 6.8 | 6.5 | 5.7 | 6.4 | 10.7 | 9.2 | 8.7 | 12.2 | 13.1 | 9.9 | 2015 | | | | | | | |
| 2015 | 8.0 | 8.2 | 7.8 | 7.5 | 7.2 | 6.8 | 6.5 | 6.5 | 6.7 | 7.5 | 7.0 | 6.7 | 6.4 | 5.7 | 6.2 | 10.0 | 8.6 | 8.0 | 10.5 | 10.5 | 7.7 | 5.5 | 2016 | | | | | | |
| 2016 | 8.1 | 8.2 | 7.9 | 7.6 | 7.3 | 7.0 | 6.6 | 6.7 | 6.9 | 7.7 | 7.2 | 7.0 | 6.7 | 6.1 | 6.6 | 9.9 | 8.7 | 8.3 | 10.3 | 10.3 | 8.4 | 7.6 | 9.7 | 2017 | | | | | |
| 2017 | 8.1 | 8.3 | 7.9 | 7.6 | 7.4 | 7.1 | 6.8 | 6.8 | 7.0 | 7.7 | 7.3 | 7.1 | 6.9 | 6.3 | 6.8 | 9.8 | 8.7 | 8.4 | 10.1 | 10.0 | 8.5 | 8.0 | 9.2 | 8.7 | 2018 | | | | |
| 2018 | 7.6 | 7.8 | 7.4 | 7.1 | 6.9 | 6.6 | 6.2 | 6.2 | 6.4 | 7.0 | 6.6 | 6.4 | 6.1 | 5.5 | 5.9 | 8.5 | 7.4 | 6.9 | 8.1 | 7.7 | 6.1 | 5.2 | 5.0 | 2.8 | -2.8 | 2019 | | | |
| 2019 | 7.9 | 8.0 | 7.7 | 7.4 | 7.2 | 6.9 | 6.6 | 6.6 | 6.8 | 7.4 | 7.0 | 6.8 | 6.6 | 6.1 | 6.6 | 8.9 | 8.0 | 7.6 | 8.8 | 8.6 | 7.4 | 6.8 | 7.2 | 6.4 | 5.2 | 13.8 | 2020 | | |
| 2020 | 7.9 | 8.0 | 7.7 | 7.4 | 7.2 | 6.9 | 6.6 | 6.7 | 6.9 | 7.4 | 7.1 | 6.9 | 6.7 | 6.2 | 6.6 | 8.8 | 8.0 | 7.6 | 8.7 | 8.5 | 7.4 | 7.0 | 7.2 | 6.6 | 6.0 | 10.6 | 7.5 | 2021 | |
| 2021 | 8.0 | 8.2 | 7.9 | 7.6 | 7.4 | 7.2 | 6.9 | 6.9 | 7.1 | 7.7 | 7.4 | 7.2 | 7.0 | 6.6 | 7.0 | 9.1 | 8.3 | 8.1 | 9.0 | 8.9 | 8.0 | 7.7 | 8.1 | 7.8 | 7.5 | 11.2 | 10.0 | 12.4 | 2022 |
| 2022 | 7.4 | 7.6 | 7.3 | 7.0 | 6.8 | 6.5 | 6.2 | 6.2 | 6.4 | 6.9 | 6.5 | 6.3 | 6.1 | 5.7 | 6.0 | 7.8 | 7.0 | 6.7 | 7.4 | 7.1 | 6.2 | 5.7 | 5.7 | 5.1 | 4.4 | 6.2 | 3.8 | 2.0 | -7.5 |
| 2023 | 7.6 | 7.7 | 7.4 | 7.2 | 7.0 | 6.7 | 6.5 | 6.5 | 6.6 | 7.1 | 6.8 | 6.6 | 6.5 | 6.1 | 6.4 | 8.1 | 7.4 | 7.1 | 7.8 | 7.6 | 6.7 | 6.4 | 6.5 | 6.1 | 5.6 | 7.4 | 5.8 | 5.3 | 1.9 |
| 2024 | 7.8 | 7.9 | 7.7 | 7.5 | 7.3 | 7.0 | 6.8 | 6.8 | 7.0 | 7.5 | 7.2 | 7.0 | 6.9 | 6.5 | 6.9 | 8.5 | 7.9 | 7.6 | 8.4 | 8.2 | 7.5 | 7.2 | 7.4 | 7.1 | 6.9 | 8.6 | 7.6 | 7.7 | 6.1 |
| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |

| | 2023 | 2024 |
|---|---|---|
| 2023 | 12.2 | 2024 |
| 2024 | 13.6 | 15.1 |
| | 2023 | 2024 |

# Dimensional Core Index Allocation

## 80% Equity, 20% Fixed Income

1994–2024 in CAD




*See Sources and Descriptions of Data.*

| | 1994 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1994 | 6.2 | 1995 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995 | 10.4 | 14.9 | 1996 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1996 | 12.5 | 15.8 | 16.7 | 1997 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997 | 13.3 | 15.7 | 16.2 | 15.7 | 1998 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1998 | 13.4 | 15.3 | 15.4 | 14.8 | 13.9 | 1999 | | | | | | | | | | | | | | | | | | | | | | | |
| 1999 | 13.9 | 15.5 | 15.6 | 15.3 | 15.0 | 16.3 | 2000 | | | | | | | | | | | | | | | | | | | | | | |
| 2000 | 12.6 | 13.7 | 13.5 | 12.7 | 11.8 | 10.7 | 5.5 | 2001 | | | | | | | | | | | | | | | | | | | | | |
| 2001 | 11.2 | 11.9 | 11.4 | 10.4 | 9.1 | 7.6 | 3.5 | 1.5 | 2002 | | | | | | | | | | | | | | | | | | | | |
| 2002 | 9.0 | 9.4 | 8.6 | 7.3 | 5.7 | 3.8 | -0.1 | -2.8 | -6.9 | 2003 | | | | | | | | | | | | | | | | | | | |
| 2003 | 9.8 | 10.2 | 9.6 | 8.6 | 7.5 | 6.3 | 3.9 | 3.4 | 4.4 | 17.0 | 2004 | | | | | | | | | | | | | | | | | | |
| 2004 | 10.0 | 10.4 | 9.9 | 9.1 | 8.1 | 7.2 | 5.5 | 5.5 | 6.9 | 14.5 | 12.0 | 2005 | | | | | | | | | | | | | | | | | |
| 2005 | 10.2 | 10.6 | 10.1 | 9.4 | 8.7 | 7.9 | 6.6 | 6.8 | 8.2 | 13.8 | 12.2 | 12.4 | 2006 | | | | | | | | | | | | | | | | |
| 2006 | 10.7 | 11.0 | 10.7 | 10.1 | 9.5 | 9.0 | 8.0 | 8.4 | 9.9 | 14.5 | 13.7 | 14.5 | 16.7 | 2007 | | | | | | | | | | | | | | | |
| 2007 | 9.9 | 10.1 | 9.8 | 9.2 | 8.5 | 7.9 | 6.9 | 7.2 | 8.1 | 11.4 | 10.0 | 9.4 | 7.9 | -0.2 | 2008 | | | | | | | | | | | | | | |
| 2008 | 7.2 | 7.3 | 6.7 | 5.9 | 5.1 | 4.2 | 3.0 | 2.7 | 2.9 | 4.6 | 2.3 | 0.0 | -3.9 | -12.8 | -23.8 | 2009 | | | | | | | | | | | | | |
| 2009 | 8.2 | 8.3 | 7.9 | 7.2 | 6.5 | 5.9 | 4.9 | 4.9 | 5.3 | 7.2 | 5.6 | 4.4 | 2.4 | -1.9 | -2.8 | 24.0 | 2010 | | | | | | | | | | | | |
| 2010 | 8.5 | 8.6 | 8.2 | 7.6 | 7.0 | 6.5 | 5.6 | 5.7 | 6.1 | 7.9 | 6.6 | 5.8 | 4.5 | 1.6 | 2.2 | 18.4 | 13.1 | 2011 | | | | | | | | | | | |
| 2011 | 7.8 | 7.8 | 7.4 | 6.8 | 6.2 | 5.7 | 4.8 | 4.8 | 5.1 | 6.5 | 5.3 | 4.3 | 3.1 | 0.5 | 0.7 | 10.5 | 4.3 | -3.7 | 2012 | | | | | | | | | | |
| 2012 | 8.0 | 8.1 | 7.7 | 7.2 | 6.6 | 6.1 | 5.4 | 5.4 | 5.7 | 7.1 | 6.0 | 5.3 | 4.3 | 2.4 | 2.9 | 10.9 | 6.9 | 3.9 | 12.1 | 2013 | | | | | | | | | |
| 2013 | 8.6 | 8.8 | 8.4 | 8.0 | 7.5 | 7.1 | 6.5 | 6.5 | 7.0 | 8.3 | 7.5 | 7.0 | 6.3 | 4.9 | 5.8 | 13.0 | 10.4 | 9.5 | 16.8 | 21.7 | 2014 | | | | | | | | |
| 2014 | 8.8 | 8.9 | 8.6 | 8.2 | 7.7 | 7.4 | 6.8 | 6.9 | 7.3 | 8.6 | 7.9 | 7.4 | 6.9 | 5.8 | 6.6 | 12.8 | 10.6 | 10.0 | 15.1 | 16.6 | 11.7 | 2015 | | | | | | | |
| 2015 | 8.7 | 8.8 | 8.5 | 8.1 | 7.7 | 7.3 | 6.8 | 6.9 | 7.3 | 8.4 | 7.7 | 7.4 | 6.9 | 5.8 | 6.6 | 11.9 | 9.9 | 9.3 | 12.9 | 13.1 | 9.1 | 6.6 | 2016 | | | | | | |
| 2016 | 8.8 | 8.9 | 8.7 | 8.3 | 7.9 | 7.6 | 7.1 | 7.2 | 7.6 | 8.7 | 8.1 | 7.8 | 7.3 | 6.5 | 7.2 | 11.9 | 10.3 | 9.8 | 12.7 | 12.9 | 10.1 | 9.3 | 12.1 | 2017 | | | | | |
| 2017 | 8.9 | 9.0 | 8.8 | 8.4 | 8.1 | 7.8 | 7.3 | 7.4 | 7.8 | 8.9 | 8.3 | 8.0 | 7.7 | 6.9 | 7.6 | 11.8 | 10.4 | 10.0 | 12.5 | 12.6 | 10.4 | 10.0 | 11.7 | 11.3 | 2018 | | | | |
| 2018 | 8.4 | 8.5 | 8.2 | 7.8 | 7.5 | 7.2 | 6.7 | 6.8 | 7.1 | 8.0 | 7.4 | 7.1 | 6.7 | 5.9 | 6.5 | 10.1 | 8.7 | 8.2 | 10.0 | 9.6 | 7.4 | 6.3 | 6.2 | 3.4 | -4.0 | 2019 | | | |
| 2019 | 8.7 | 8.8 | 8.6 | 8.2 | 7.9 | 7.6 | 7.2 | 7.3 | 7.6 | 8.5 | 8.0 | 7.8 | 7.5 | 6.8 | 7.4 | 10.8 | 9.5 | 9.1 | 10.9 | 10.7 | 9.0 | 8.4 | 8.9 | 7.9 | 6.2 | 17.3 | 2020 | | |
| 2020 | 8.7 | 8.8 | 8.6 | 8.2 | 7.9 | 7.7 | 7.3 | 7.4 | 7.7 | 8.5 | 8.1 | 7.8 | 7.5 | 6.9 | 7.5 | 10.6 | 9.4 | 9.1 | 10.6 | 10.4 | 8.9 | 8.4 | 8.8 | 8.0 | 6.9 | 12.8 | 8.4 | 2021 | |
| 2021 | 9.0 | 9.1 | 8.9 | 8.6 | 8.3 | 8.1 | 7.7 | 7.8 | 8.1 | 9.0 | 8.6 | 8.4 | 8.1 | 7.6 | 8.2 | 11.1 | 10.1 | 9.8 | 11.3 | 11.2 | 9.9 | 9.7 | 10.2 | 9.8 | 9.5 | 14.4 | 12.9 | 17.6 | 2022 |
| 2022 | 8.4 | 8.5 | 8.2 | 7.9 | 7.6 | 7.4 | 7.0 | 7.1 | 7.3 | 8.1 | 7.7 | 7.4 | 7.1 | 6.6 | 7.0 | 9.7 | 8.6 | 8.3 | 9.4 | 9.2 | 7.8 | 7.4 | 7.5 | 6.7 | 5.8 | 8.5 | 5.6 | 4.3 | -7.5 |
| 2023 | 8.6 | 8.7 | 8.5 | 8.2 | 7.9 | 7.6 | 7.3 | 7.4 | 7.7 | 8.4 | 8.0 | 7.8 | 7.5 | 7.0 | 7.5 | 10.0 | 9.0 | 8.7 | 9.8 | 9.6 | 8.5 | 8.1 | 8.3 | 7.8 | 7.2 | 9.6 | 7.8 | 7.6 | 2.9 |
| 2024 | 8.9 | 9.0 | 8.8 | 8.5 | 8.3 | 8.1 | 7.8 | 7.8 | 8.1 | 8.9 | 8.5 | 8.3 | 8.1 | 7.7 | 8.1 | 10.5 | 9.7 | 9.4 | 10.5 | 10.4 | 9.4 | 9.2 | 9.5 | 9.2 | 8.9 | 11.2 | 10.0 | 10.4 | 8.1 |
| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |

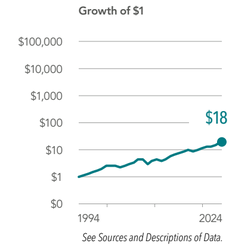
| | 2023 | 2024 |
|---|---|---|
| 2023 | 14.5 | 2024 |
| 2024 | 16.8 | 19.1 |
| | 2023 | 2024 |



# Dimensional Core Index Allocation

## 100% Equity

1994–2024 in CAD




*See Sources and Descriptions of Data.*

| | 1994 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1994 | 8.1 | 1995 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995 | 11.1 | 14.1 | 1996 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1996 | 13.8 | 16.7 | 19.4 | 1997 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997 | 14.9 | 17.2 | 18.7 | 18.1 | 1998 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1998 | 14.8 | 16.6 | 17.4 | 16.4 | 14.8 | 1999 | | | | | | | | | | | | | | | | | | | | | | | |
| 1999 | 15.7 | 17.2 | 18.0 | 17.5 | 17.3 | 19.8 | 2000 | | | | | | | | | | | | | | | | | | | | | | |
| 2000 | 14.0 | 15.0 | 15.2 | 14.2 | 12.9 | 12.0 | 4.7 | 2001 | | | | | | | | | | | | | | | | | | | | | |
| 2001 | 12.1 | 12.7 | 12.5 | 11.1 | 9.4 | 7.7 | 2.1 | -0.4 | 2002 | | | | | | | | | | | | | | | | | | | | |
| 2002 | 9.3 | 9.5 | 8.8 | 7.1 | 5.1 | 2.8 | -2.4 | -5.7 | -10.7 | 2003 | | | | | | | | | | | | | | | | | | | |
| 2003 | 10.3 | 10.5 | 10.1 | 8.8 | 7.3 | 5.9 | 2.7 | 2.0 | 3.2 | 19.4 | 2004 | | | | | | | | | | | | | | | | | | |
| 2004 | 10.6 | 10.8 | 10.5 | 9.4 | 8.2 | 7.1 | 4.8 | 4.8 | 6.6 | 16.4 | 13.6 | 2005 | | | | | | | | | | | | | | | | | |
| 2005 | 10.9 | 11.2 | 10.9 | 10.0 | 9.0 | 8.2 | 6.4 | 6.7 | 8.6 | 15.9 | 14.2 | 14.9 | 2006 | | | | | | | | | | | | | | | | |
| 2006 | 11.6 | 11.9 | 11.7 | 11.0 | 10.2 | 9.6 | 8.3 | 8.9 | 10.8 | 17.0 | 16.2 | 17.5 | 20.2 | 2007 | | | | | | | | | | | | | | | |
| 2007 | 10.6 | 10.8 | 10.6 | 9.8 | 9.0 | 8.4 | 7.0 | 7.3 | 8.7 | 13.1 | 11.5 | 10.9 | 8.9 | -1.3 | 2008 | | | | | | | | | | | | | | |
| 2008 | 7.4 | 7.3 | 6.8 | 5.8 | 4.8 | 3.8 | 2.2 | 1.9 | 2.2 | 4.6 | 1.8 | -0.9 | -5.7 | -16.4 | -29.2 | 2009 | | | | | | | | | | | | | |
| 2009 | 8.5 | 8.6 | 8.2 | 7.4 | 6.5 | 5.8 | 4.5 | 4.4 | 5.1 | 7.5 | 5.7 | 4.2 | 1.7 | -3.8 | -5.1 | 27.3 | 2010 | | | | | | | | | | | | |
| 2010 | 8.9 | 8.9 | 8.6 | 7.9 | 7.1 | 6.5 | 5.4 | 5.4 | 6.1 | 8.4 | 6.9 | 5.9 | 4.1 | 0.5 | 1.1 | 20.8 | 14.6 | 2011 | | | | | | | | | | | |
| 2011 | 8.0 | 8.0 | 7.6 | 6.9 | 6.1 | 5.5 | 4.4 | 4.3 | 4.8 | 6.7 | 5.2 | 4.1 | 2.4 | -0.8 | -0.7 | 11.1 | 3.8 | -5.9 | 2012 | | | | | | | | | | |
| 2012 | 8.2 | 8.2 | 7.9 | 7.2 | 6.5 | 6.0 | 5.0 | 5.0 | 5.5 | 7.3 | 6.0 | 5.1 | 3.7 | 1.2 | 1.7 | 11.4 | 6.6 | 2.8 | 12.3 | 2013 | | | | | | | | | |
| 2013 | 9.1 | 9.1 | 8.9 | 8.3 | 7.7 | 7.2 | 6.4 | 6.5 | 7.1 | 8.9 | 7.9 | 7.3 | 6.4 | 4.5 | 5.6 | 14.3 | 11.3 | 10.3 | 19.3 | 26.8 | 2014 | | | | | | | | |
| 2014 | 9.2 | 9.3 | 9.1 | 8.5 | 8.0 | 7.6 | 6.8 | 6.9 | 7.5 | 9.2 | 8.3 | 7.8 | 7.0 | 5.5 | 6.5 | 14.0 | 11.5 | 10.8 | 17.0 | 19.4 | 12.5 | 2015 | | | | | | | |
| 2015 | 9.2 | 9.2 | 9.0 | 8.5 | 7.9 | 7.6 | 6.8 | 7.0 | 7.5 | 9.1 | 8.3 | 7.8 | 7.1 | 5.7 | 6.7 | 13.1 | 10.9 | 10.2 | 14.6 | 15.4 | 10.0 | 7.6 | 2016 | | | | | | |
| 2016 | 9.4 | 9.4 | 9.2 | 8.7 | 8.3 | 7.9 | 7.2 | 7.4 | 7.9 | 9.4 | 8.7 | 8.3 | 7.7 | 6.5 | 7.4 | 13.2 | 11.3 | 10.8 | 14.5 | 15.0 | 11.3 | 10.8 | 14.0 | 2017 | | | | | |
| 2017 | 9.5 | 9.6 | 9.4 | 9.0 | 8.5 | 8.2 | 7.6 | 7.7 | 8.3 | 9.7 | 9.0 | 8.7 | 8.2 | 7.1 | 8.0 | 13.2 | 11.6 | 11.2 | 14.3 | 14.7 | 11.9 | 11.7 | 13.7 | 13.4 | 2018 | | | | |
| 2018 | 8.9 | 9.0 | 8.7 | 8.3 | 7.8 | 7.5 | 6.9 | 7.0 | 7.4 | 8.7 | 8.0 | 7.6 | 7.1 | 6.1 | 6.8 | 11.3 | 9.6 | 9.0 | 11.3 | 11.1 | 8.2 | 7.2 | 7.1 | 3.8 | -5.1 | 2019 | | | |
| 2019 | 9.3 | 9.4 | 9.2 | 8.7 | 8.3 | 8.0 | 7.5 | 7.6 | 8.1 | 9.3 | 8.7 | 8.4 | 7.9 | 7.1 | 7.8 | 12.0 | 10.6 | 10.1 | 12.3 | 12.3 | 10.1 | 9.6 | 10.1 | 8.8 | 6.6 | 19.7 | 2020 | | |
| 2020 | 9.3 | 9.3 | 9.1 | 8.7 | 8.3 | 8.1 | 7.5 | 7.7 | 8.1 | 9.3 | 8.7 | 8.4 | 8.0 | 7.2 | 7.8 | 11.7 | 10.4 | 10.0 | 11.9 | 11.8 | 9.9 | 9.4 | 9.8 | 8.8 | 7.2 | 14.0 | 8.6 | 2021 | |
| 2021 | 9.7 | 9.8 | 9.6 | 9.3 | 8.9 | 8.7 | 8.2 | 8.3 | 8.8 | 9.9 | 9.4 | 9.2 | 8.9 | 8.1 | 8.8 | 12.5 | 11.4 | 11.1 | 12.9 | 13.0 | 11.4 | 11.2 | 11.8 | 11.4 | 10.9 | 16.8 | 15.4 | 22.7 | 2022 |
| 2022 | 9.1 | 9.2 | 9.0 | 8.6 | 8.2 | 8.0 | 7.5 | 7.6 | 8.0 | 9.1 | 8.5 | 8.3 | 7.9 | 7.2 | 7.7 | 11.0 | 9.9 | 9.5 | 11.0 | 10.9 | 9.2 | 8.8 | 9.0 | 8.2 | 7.2 | 10.5 | 7.6 | 7.1 | -6.6 |
| 2023 | 9.4 | 9.4 | 9.2 | 8.9 | 8.5 | 8.3 | 7.8 | 8.0 | 8.4 | 9.4 | 8.9 | 8.7 | 8.3 | 7.7 | 8.2 | 11.4 | 10.3 | 10.0 | 11.4 | 11.3 | 9.9 | 9.6 | 9.9 | 9.3 | 8.6 | 11.6 | 9.6 | 10.0 | 4.1 |
| 2024 | 9.8 | 9.8 | 9.7 | 9.4 | 9.0 | 8.8 | 8.4 | 8.6 | 9.0 | 10.0 | 9.5 | 9.3 | 9.1 | 8.5 | 9.1 | 12.1 | 11.1 | 10.9 | 12.3 | 12.3 | 11.1 | 10.9 | 11.3 | 10.9 | 10.6 | 13.4 | 12.2 | 13.2 | 10.2 |
| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 |

| | 2023 | 2024 |
|---|---|---|
| 2023 | 16.1 | 2024 |
| 2024 | 19.6 | 23.2 |
| | 2023 | 2024 |

# Dimensional Core Plus Index Allocations

## WEIGHTS (%)

**The Dimensional Index Allocation represent Dimensional's research-driven, systematic approach to asset** allocation. The Core Plus Index Allocations are constructed using mostly Dimensional indices and are designed to have a stronger emphasis on securities with higher expected returns than the Core Index Allocations. The allocations may inform expectations about the performance of different asset allocations over time and about return deviations versus the market.

| EQUITY | 0% | 20% | 40% | 60% | 80% | 100% |
|---|---|---|---|---|---|---|
| Dimensional Canadian Core Equity Index | 0.0 | 4.5 | 9.0 | 13.4 | 17.9 | 22.4 |
| Dimensional Canadian Vector Equity Index | 0.0 | 1.9 | 3.8 | 5.8 | 7.7 | 9.6 |
| Dimensional US Core Equity Index (Canada) | 0.0 | 4.3 | 5.7 | 8.6 | 11.5 | 14.4 |
| Dimensional US Core Equity Index (Canada) (Hedged to CAD) | 0.0 | 1.4 | 5.7 | 8.6 | 11.5 | 14.4 |
| Dimensional US All Cap Vector Index | 0.0 | 2.5 | 4.9 | 5.9 | 5.9 | 6.2 |
| Dimensional US All Cap Vector Index (Hedged to CAD) | 0.0 | 0.0 | 0.0 | 1.5 | 3.9 | 6.2 |
| Dimensional International Core Equity Index (Canada) | 0.0 | 2.4 | 3.2 | 4.8 | 6.4 | 8.1 |
| Dimensional International Core Equity Index (Canada) (Hedged to CAD) | 0.0 | 0.8 | 3.2 | 4.8 | 6.4 | 8.1 |
| Dimensional International Vector Equity Index (Canada) | 0.0 | 1.4 | 2.8 | 3.3 | 3.3 | 3.5 |
| Dimensional International Vector Equity Index (Canada) (Hedged to CAD) | 0.0 | 0.0 | 0.0 | 0.8 | 2.2 | 3.5 |
| S&P Global REIT Index | 0.0 | 0.8 | 1.6 | 2.4 | 3.2 | 4.0 |
| **FIXED INCOME** | **100%** | **80%** | **60%** | **40%** | **20%** | **0%** |
| Dimensional Global Short-Term Government Variable Maturity Index (Hedged to CAD) | 85.0 | 48.0 | 30.0 | 16.0 | 6.0 | 0.0 |
| Dimensional Global Adjusted Investment Grade Bond Index (Hedged to CAD) | 15.0 | 12.0 | 15.0 | 14.0 | 9.0 | 0.0 |
| Dimensional Global Targeted Credit Index (Hedged to CAD) | 0.0 | 20.0 | 15.0 | 10.0 | 5.0 | 0.0 |

Weights as of December 31, 2024. Rebalanced monthly. Totals may not equal 100% due to rounding. For illustrative purposes only. The Index Allocations are unmanaged and are not subject to fees and expenses typically associated with managed accounts or investment funds. Indices are not available for direct investment. **Past performance is no guarantee of future results.**



# Dimensional Core Plus Index Allocations

## SUMMARY STATISTICS

As of December 31, 2024

| EQUITY | 0% | 20% | 40% | 60% | 80% | 100% |
|---|---|---|---|---|---|---|
| **FIXED INCOME** | **100%** | **80%** | **60%** | **40%** | **20%** | **0%** |
| 1-Year Return (%) | 3.39 | 7.20 | 10.23 | 13.33 | 16.36 | 19.48 |
| 3-Year Annualized Return (%) | 0.03 | 2.24 | 3.82 | 5.45 | 7.08 | 8.80 |
| 5-Year Annualized Return (%) | 0.31 | 3.07 | 5.26 | 7.40 | 9.47 | 11.50 |
| 10-Year Annualized Return (%) | 1.17 | 3.47 | 5.30 | 7.02 | 8.61 | 10.10 |
| 15-Year Annualized Return (%) | 2.35 | 4.52 | 6.23 | 7.81 | 9.23 | 10.51 |
| 20-Year Annualized Return (%) | 2.88 | 4.55 | 5.86 | 7.05 | 8.10 | 9.02 |
| Annualized Return (%) 1994–2024 | 4.28 | 5.72 | 6.95 | 8.07 | 9.07 | 9.96 |
| Annualized Standard Deviation (%) 1994–2024 | 2.63 | 3.41 | 5.52 | 7.84 | 10.24 | 12.61 |
| Lowest 1-Year Return (%) | −9.43 (10/21–09/22) | −9.75 (10/21–09/22) | −16.29 (03/08–02/09) | −24.96 (03/08–02/09) | −32.87 (03/08–02/09) | −39.79 (03/08–02/09) |
| Lowest 3-Year Annualized Return (%) | −2.69 (03/20–02/23) | −0.33 (10/19–09/22) | −2.72 (03/06–02/09) | −6.29 (03/06–02/09) | −9.75 (03/06–02/09) | −13.01 (03/06–02/09) |
| Highest 1-Year Return (%) | 18.46 (01/95–12/95) | 17.53 (02/95–01/96) | 25.97 (03/09–02/10) | 35.13 (03/09–02/10) | 45.08 (04/20–03/21) | 56.90 (04/20–03/21) |
| Highest 3-Year Annualized Return (%) | 10.58 (01/95–12/97) | 11.71 (02/95–01/98) | 14.23 (03/95–02/98) | 17.20 (04/03–03/06) | 22.20 (04/03–03/06) | 27.23 (04/03–03/06) |
| Growth of $1 1994–2024 | 3.67 | 5.61 | 8.03 | 11.09 | 14.76 | 18.99 |

Assumes all strategies have been rebalanced monthly. Highest and lowest one-year and three-year returns are calculated from periods overlapping monthly. **Annualized standard deviation is calculated from monthly data. All performance results of the Index Allocations are based on performance of indices with backtested asset allocations; the performance was achieved with the benefit of hindsight; it does not represent actual investment strategies. The allocation's performance does not reflect advisory fees or other expenses associated with the management of an actual portfolio. There are limitations inherent in asset allocations. In particular, performance may not reflect the impact that economic and market factors may have had on the advisor's decision-making if the advisor were actually managing client money. Past performance is no guarantee of future results.**

# Dimensional Core Plus Index Allocation

## 100% Fixed Income

1994–2024 in CAD

| | 1994 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1994 | -2.1 | 1995 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995 | 7.7 | 18.5 | 1996 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1996 | 7.7 | 13.0 | 7.8 | 1997 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997 | 7.3 | 10.6 | 6.8 | 5.9 | 1998 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1998 | 7.6 | 10.2 | 7.6 | 7.4 | 9.0 | 1999 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1999 | 7.0 | 8.9 | 6.7 | 6.3 | 6.5 | 4.1 | 2000 | | | | | | | | | | | | | | | | | | | | | | | |
| 2000 | 7.1 | 8.8 | 6.9 | 6.7 | 7.0 | 6.0 | 7.8 | 2001 | | | | | | | | | | | | | | | | | | | | | | |
| 2001 | 7.2 | 8.6 | 7.0 | 6.9 | 7.1 | 6.5 | 7.7 | 7.5 | 2002 | | | | | | | | | | | | | | | | | | | | | |
| 2002 | 7.4 | 8.6 | 7.3 | 7.2 | 7.4 | 7.0 | 8.0 | 8.1 | 8.8 | 2003 | | | | | | | | | | | | | | | | | | | | |
| 2003 | 7.1 | 8.2 | 6.9 | 6.8 | 7.0 | 6.6 | 7.2 | 7.0 | 6.7 | 4.7 | 2004 | | | | | | | | | | | | | | | | | | | |
| 2004 | 6.9 | 7.8 | 6.7 | 6.6 | 6.6 | 6.3 | 6.7 | 6.4 | 6.1 | 4.7 | 4.7 | 2005 | | | | | | | | | | | | | | | | | | |
| 2005 | 6.5 | 7.3 | 6.2 | 6.1 | 6.1 | 5.7 | 5.9 | 5.6 | 5.1 | 3.9 | 3.5 | 2.3 | 2006 | | | | | | | | | | | | | | | | | |
| 2006 | 6.2 | 6.9 | 6.0 | 5.8 | 5.8 | 5.4 | 5.5 | 5.2 | 4.7 | 3.7 | 3.4 | 2.7 | 3.2 | 2007 | | | | | | | | | | | | | | | | |
| 2007 | 6.2 | 6.8 | 5.9 | 5.7 | 5.7 | 5.4 | 5.5 | 5.2 | 4.8 | 4.1 | 3.9 | 3.6 | 4.3 | 5.5 | 2008 | | | | | | | | | | | | | | | |
| 2008 | 6.3 | 7.0 | 6.1 | 6.0 | 6.0 | 5.7 | 5.9 | 5.6 | 5.4 | 4.8 | 4.8 | 4.9 | 5.7 | 7.0 | 8.6 | 2009 | | | | | | | | | | | | | | |
| 2009 | 6.1 | 6.7 | 5.9 | 5.8 | 5.7 | 5.4 | 5.6 | 5.3 | 5.1 | 4.5 | 4.5 | 4.5 | 5.0 | 5.7 | 5.8 | 3.0 | 2010 | | | | | | | | | | | | | |
| 2010 | 6.1 | 6.6 | 5.9 | 5.7 | 5.7 | 5.5 | 5.6 | 5.4 | 5.1 | 4.7 | 4.7 | 4.7 | 5.2 | 5.7 | 5.8 | 4.4 | 5.7 | 2011 | | | | | | | | | | | | |
| 2011 | 6.1 | 6.6 | 5.9 | 5.8 | 5.8 | 5.5 | 5.7 | 5.5 | 5.3 | 4.9 | 4.9 | 4.9 | 5.4 | 5.8 | 5.9 | 5.0 | 6.0 | 6.3 | 2012 | | | | | | | | | | | |
| 2012 | 6.1 | 6.5 | 5.9 | 5.8 | 5.8 | 5.5 | 5.6 | 5.5 | 5.3 | 4.9 | 5.0 | 5.0 | 5.4 | 5.8 | 5.8 | 5.1 | 5.8 | 5.9 | 5.5 | 2013 | | | | | | | | | | |
| 2013 | 5.8 | 6.3 | 5.6 | 5.5 | 5.5 | 5.2 | 5.3 | 5.1 | 4.9 | 4.6 | 4.6 | 4.6 | 4.8 | 5.1 | 5.0 | 4.3 | 4.6 | 4.3 | 3.3 | 1.2 | 2014 | | | | | | | | | |
| 2014 | 5.8 | 6.2 | 5.6 | 5.5 | 5.5 | 5.2 | 5.3 | 5.1 | 5.0 | 4.6 | 4.6 | 4.6 | 4.9 | 5.1 | 5.1 | 4.5 | 4.8 | 4.5 | 3.9 | 3.2 | 5.3 | 2015 | | | | | | | | |
| 2015 | 5.6 | 6.0 | 5.4 | 5.3 | 5.3 | 5.1 | 5.1 | 4.9 | 4.8 | 4.5 | 4.4 | 4.4 | 4.6 | 4.8 | 4.7 | 4.2 | 4.3 | 4.1 | 3.5 | 2.9 | 3.8 | 2.3 | 2016 | | | | | | | |
| 2016 | 5.5 | 5.8 | 5.3 | 5.2 | 5.1 | 4.9 | 4.9 | 4.8 | 4.6 | 4.3 | 4.3 | 4.2 | 4.4 | 4.5 | 4.4 | 3.9 | 4.0 | 3.8 | 3.3 | 2.7 | 3.3 | 2.3 | 2.3 | 2017 | | | | | | |
| 2017 | 5.3 | 5.6 | 5.1 | 5.0 | 4.9 | 4.7 | 4.7 | 4.6 | 4.4 | 4.1 | 4.1 | 4.0 | 4.1 | 4.2 | 4.1 | 3.6 | 3.7 | 3.4 | 2.9 | 2.4 | 2.8 | 1.9 | 1.8 | 1.2 | 2018 | | | | | |
| 2018 | 5.1 | 5.4 | 4.9 | 4.8 | 4.7 | 4.5 | 4.5 | 4.3 | 4.2 | 3.9 | 3.8 | 3.7 | 3.9 | 3.9 | 3.8 | 3.3 | 3.3 | 3.0 | 2.6 | 2.1 | 2.3 | 1.6 | 1.4 | 0.9 | 0.5 | 2019 | | | | |
| 2019 | 5.1 | 5.4 | 4.8 | 4.7 | 4.7 | 4.5 | 4.5 | 4.3 | 4.1 | 3.9 | 3.8 | 3.8 | 3.9 | 3.9 | 3.8 | 3.4 | 3.4 | 3.1 | 2.7 | 2.4 | 2.6 | 2.0 | 2.0 | 1.9 | 2.2 | 3.9 | 2020 | | | |
| 2020 | 5.0 | 5.3 | 4.8 | 4.7 | 4.6 | 4.4 | 4.4 | 4.3 | 4.1 | 3.8 | 3.8 | 3.7 | 3.8 | 3.9 | 3.8 | 3.4 | 3.4 | 3.2 | 2.8 | 2.5 | 2.7 | 2.3 | 2.3 | 2.3 | 2.6 | 3.7 | 3.5 | 2021 | | |
| 2021 | 4.7 | 5.0 | 4.5 | 4.4 | 4.3 | 4.1 | 4.1 | 4.0 | 3.8 | 3.5 | 3.5 | 3.4 | 3.5 | 3.5 | 3.3 | 2.9 | 2.9 | 2.7 | 2.3 | 2.0 | 2.1 | 1.7 | 1.6 | 1.4 | 1.5 | 1.8 | 0.7 | -1.9 | 2022 | |
| 2022 | 4.3 | 4.5 | 4.0 | 3.9 | 3.8 | 3.6 | 3.6 | 3.4 | 3.2 | 2.9 | 2.8 | 2.7 | 2.7 | 2.7 | 2.5 | 2.1 | 2.0 | 1.7 | 1.3 | 0.9 | 0.9 | 0.4 | 0.1 | -0.2 | -0.5 | -0.8 | -2.3 | -5.1 | -8.1 | 2023 |
| 2023 | 4.3 | 4.5 | 4.1 | 3.9 | 3.9 | 3.7 | 3.6 | 3.5 | 3.3 | 3.0 | 2.9 | 2.9 | 2.9 | 2.9 | 2.7 | 2.3 | 2.3 | 2.0 | 1.7 | 1.3 | 1.4 | 0.9 | 0.8 | 0.5 | 0.4 | 0.4 | -0.4 | -1.7 | -1.6 | 5.4 |
| 2024 | 4.3 | 4.5 | 4.0 | 3.9 | 3.8 | 3.7 | 3.6 | 3.5 | 3.3 | 3.0 | 3.0 | 2.9 | 2.9 | 2.9 | 2.8 | 2.4 | 2.4 | 2.1 | 1.8 | 1.5 | 1.5 | 1.2 | 1.0 | 0.9 | 0.8 | 0.9 | 0.3 | -0.5 | 0.0 | 4.4 |
| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |

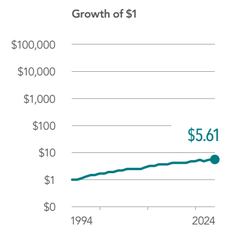
*See Sources and Descriptions of Data.*

# Dimensional Core Plus Index Allocation

## 20% Equity, 80% Fixed Income

1994–2024 in CAD

| | 1994 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1994 | 0.5 | 1995 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995 | 8.3 | 16.8 | 1996 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1996 | 8.8 | 13.2 | 9.7 | 1997 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997 | 8.6 | 11.5 | 8.9 | 8.2 | 1998 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1998 | 8.8 | 11.0 | 9.1 | 8.8 | 9.5 | 1999 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1999 | 8.5 | 10.1 | 8.5 | 8.2 | 8.2 | 6.9 | 2000 | | | | | | | | | | | | | | | | | | | | | | | |
| 2000 | 8.4 | 9.7 | 8.4 | 8.0 | 8.0 | 7.2 | 7.6 | 2001 | | | | | | | | | | | | | | | | | | | | | | |
| 2001 | 8.2 | 9.3 | 8.1 | 7.8 | 7.7 | 7.1 | 7.3 | 7.0 | 2002 | | | | | | | | | | | | | | | | | | | | | |
| 2002 | 7.8 | 8.7 | 7.6 | 7.3 | 7.1 | 6.6 | 6.5 | 5.9 | 4.8 | 2003 | | | | | | | | | | | | | | | | | | | | |
| 2003 | 8.0 | 8.8 | 7.9 | 7.6 | 7.5 | 7.2 | 7.2 | 7.1 | 7.2 | 9.5 | 2004 | | | | | | | | | | | | | | | | | | | |
| 2004 | 7.9 | 8.7 | 7.8 | 7.5 | 7.5 | 7.1 | 7.2 | 7.1 | 7.1 | 8.3 | 7.0 | 2005 | | | | | | | | | | | | | | | | | | |
| 2005 | 7.6 | 8.3 | 7.5 | 7.2 | 7.1 | 6.8 | 6.8 | 6.6 | 6.5 | 7.1 | 5.9 | 4.7 | 2006 | | | | | | | | | | | | | | | | | |
| 2006 | 7.6 | 8.2 | 7.4 | 7.2 | 7.1 | 6.8 | 6.8 | 6.6 | 6.6 | 7.0 | 6.2 | 5.8 | 6.9 | 2007 | | | | | | | | | | | | | | | | |
| 2007 | 7.3 | 7.8 | 7.1 | 6.9 | 6.7 | 6.4 | 6.4 | 6.2 | 6.1 | 6.3 | 5.5 | 5.1 | 5.2 | 3.6 | 2008 | | | | | | | | | | | | | | | |
| 2008 | 6.5 | 7.0 | 6.2 | 6.0 | 5.8 | 5.4 | 5.2 | 4.9 | 4.7 | 4.6 | 3.7 | 2.9 | 2.2 | 0.0 | -3.5 | 2009 | | | | | | | | | | | | | | |
| 2009 | 6.9 | 7.3 | 6.6 | 6.4 | 6.3 | 6.0 | 5.9 | 5.7 | 5.5 | 5.6 | 5.0 | 4.6 | 4.6 | 3.8 | 4.0 | 12.0 | 2010 | | | | | | | | | | | | | |
| 2010 | 6.9 | 7.4 | 6.8 | 6.5 | 6.4 | 6.2 | 6.1 | 6.0 | 5.8 | 6.0 | 5.5 | 5.2 | 5.3 | 4.9 | 5.4 | 10.1 | 8.3 | 2011 | | | | | | | | | | | | |
| 2011 | 6.7 | 7.1 | 6.5 | 6.3 | 6.2 | 5.9 | 5.9 | 5.7 | 5.6 | 5.6 | 5.2 | 4.9 | 4.9 | 4.6 | 4.8 | 7.7 | 5.6 | 3.1 | 2012 | | | | | | | | | | | |
| 2012 | 6.8 | 7.2 | 6.6 | 6.5 | 6.3 | 6.1 | 6.1 | 5.9 | 5.9 | 6.0 | 5.6 | 5.4 | 5.5 | 5.2 | 5.6 | 8.0 | 6.7 | 5.9 | 8.7 | 2013 | | | | | | | | | | |
| 2013 | 6.8 | 7.2 | 6.6 | 6.5 | 6.4 | 6.2 | 6.1 | 6.0 | 5.9 | 6.0 | 5.7 | 5.5 | 5.6 | 5.4 | 5.8 | 7.7 | 6.7 | 6.1 | 7.7 | 6.7 | 2014 | | | | | | | | | |
| 2014 | 6.8 | 7.1 | 6.6 | 6.5 | 6.4 | 6.2 | 6.1 | 6.0 | 6.0 | 6.1 | 5.8 | 5.6 | 5.7 | 5.6 | 5.9 | 7.5 | 6.7 | 6.2 | 7.3 | 6.6 | 6.6 | 2015 | | | | | | | | |
| 2015 | 6.6 | 6.9 | 6.4 | 6.3 | 6.2 | 6.0 | 5.9 | 5.8 | 5.7 | 5.8 | 5.5 | 5.4 | 5.4 | 5.3 | 5.5 | 6.8 | 6.0 | 5.5 | 6.2 | 5.3 | 4.7 | 2.7 | 2016 | | | | | | | |
| 2016 | 6.6 | 6.9 | 6.4 | 6.3 | 6.1 | 6.0 | 5.9 | 5.8 | 5.7 | 5.8 | 5.5 | 5.4 | 5.5 | 5.3 | 5.5 | 6.7 | 5.9 | 5.6 | 6.1 | 5.4 | 5.0 | 4.2 | 5.7 | 2017 | | | | | | |
| 2017 | 6.5 | 6.7 | 6.3 | 6.2 | 6.0 | 5.9 | 5.8 | 5.7 | 5.6 | 5.7 | 5.4 | 5.3 | 5.3 | 5.2 | 5.4 | 6.4 | 5.7 | 5.4 | 5.7 | 5.2 | 4.8 | 4.2 | 4.9 | 4.2 | 2018 | | | | | |
| 2018 | 6.2 | 6.4 | 6.0 | 5.8 | 5.7 | 5.5 | 5.4 | 5.3 | 5.2 | 5.3 | 5.0 | 4.8 | 4.8 | 4.7 | 4.8 | 5.6 | 5.0 | 4.5 | 4.8 | 4.1 | 3.6 | 2.9 | 2.9 | 1.6 | -1.0 | 2019 | | | | |
| 2019 | 6.2 | 6.5 | 6.1 | 5.9 | 5.8 | 5.6 | 5.6 | 5.5 | 5.4 | 5.4 | 5.2 | 5.0 | 5.1 | 4.9 | 5.0 | 5.9 | 5.3 | 4.9 | 5.2 | 4.7 | 4.3 | 3.9 | 4.2 | 3.7 | 3.4 | 8.0 | 2020 | | | |
| 2020 | 6.2 | 6.4 | 6.0 | 5.9 | 5.8 | 5.6 | 5.6 | 5.5 | 5.4 | 5.4 | 5.2 | 5.1 | 5.1 | 5.0 | 5.1 | 5.8 | 5.3 | 5.0 | 5.2 | 4.8 | 4.5 | 4.1 | 4.4 | 4.1 | 4.1 | 6.7 | 5.4 | 2021 | | |
| 2021 | 6.1 | 6.3 | 5.9 | 5.8 | 5.7 | 5.5 | 5.5 | 5.4 | 5.3 | 5.3 | 5.1 | 5.0 | 5.0 | 4.8 | 4.9 | 5.6 | 5.1 | 4.8 | 5.0 | 4.6 | 4.3 | 4.0 | 4.2 | 3.9 | 3.9 | 5.5 | 4.3 | 3.2 | 2022 | |
| 2022 | 5.6 | 5.8 | 5.4 | 5.2 | 5.1 | 4.9 | 4.8 | 4.7 | 4.6 | 4.6 | 4.4 | 4.2 | 4.2 | 4.0 | 4.0 | 4.6 | 4.0 | 3.7 | 3.8 | 3.3 | 2.9 | 2.4 | 2.4 | 1.9 | 1.4 | 2.0 | 0.1 | -2.5 | -7.8 | 2023 |
| 2023 | 5.7 | 5.9 | 5.5 | 5.3 | 5.2 | 5.1 | 5.0 | 4.9 | 4.8 | 4.8 | 4.5 | 4.4 | 4.4 | 4.2 | 4.3 | 4.8 | 4.3 | 4.0 | 4.1 | 3.7 | 3.4 | 3.1 | 3.1 | 2.7 | 2.5 | 3.2 | 2.1 | 1.0 | -0.1 | 8.2 |
| 2024 | 5.7 | 5.9 | 5.5 | 5.4 | 5.3 | 5.1 | 5.1 | 5.0 | 4.9 | 4.9 | 4.7 | 4.5 | 4.5 | 4.4 | 4.5 | 5.0 | 4.5 | 4.3 | 4.4 | 4.0 | 3.8 | 3.5 | 3.6 | 3.3 | 3.2 | 3.9 | 3.1 | 2.5 | 2.2 | 7.7 |
| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |




*See Sources and Descriptions of Data.*

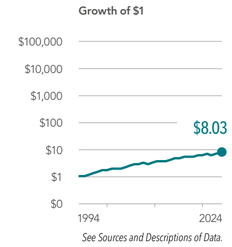


# Dimensional Core Plus Index Allocation

## 40% Equity, 60% Fixed Income

1994–2024 in CAD

| | 1994 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1994 | 1.7 | 1995 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995 | 8.9 | 16.6 | 1996 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1996 | 10.1 | 14.5 | 12.5 | 1997 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997 | 10.3 | 13.3 | 11.7 | 10.9 | 1998 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1998 | 10.2 | 12.4 | 11.1 | 10.4 | 9.9 | 1999 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1999 | 10.2 | 12.0 | 10.9 | 10.3 | 10.0 | 10.1 | 2000 | | | | | | | | | | | | | | | | | | | | | | | |
| 2000 | 9.8 | 11.2 | 10.2 | 9.6 | 9.2 | 8.9 | 7.6 | 2001 | | | | | | | | | | | | | | | | | | | | | | |
| 2001 | 9.3 | 10.4 | 9.4 | 8.8 | 8.3 | 7.8 | 6.7 | 5.8 | 2002 | | | | | | | | | | | | | | | | | | | | | |
| 2002 | 8.3 | 9.2 | 8.2 | 7.5 | 6.8 | 6.1 | 4.7 | 3.3 | 1.0 | 2003 | | | | | | | | | | | | | | | | | | | | |
| 2003 | 8.9 | 9.7 | 8.9 | 8.4 | 8.0 | 7.6 | 7.0 | 6.8 | 7.3 | 13.9 | 2004 | | | | | | | | | | | | | | | | | | | |
| 2004 | 9.0 | 9.7 | 9.0 | 8.5 | 8.2 | 7.9 | 7.5 | 7.5 | 8.0 | 11.7 | 9.6 | 2005 | | | | | | | | | | | | | | | | | | |
| 2005 | 8.9 | 9.6 | 8.9 | 8.5 | 8.2 | 7.9 | 7.6 | 7.6 | 8.0 | 10.5 | 8.8 | 8.0 | 2006 | | | | | | | | | | | | | | | | | |
| 2006 | 9.0 | 9.6 | 9.0 | 8.7 | 8.4 | 8.2 | 8.0 | 8.0 | 8.5 | 10.4 | 9.3 | 9.1 | 10.2 | 2007 | | | | | | | | | | | | | | | | |
| 2007 | 8.5 | 9.1 | 8.5 | 8.1 | 7.8 | 7.6 | 7.3 | 7.2 | 7.5 | 8.8 | 7.6 | 6.9 | 6.4 | 2.7 | 2008 | | | | | | | | | | | | | | | |
| 2008 | 7.0 | 7.4 | 6.7 | 6.2 | 5.8 | 5.4 | 4.9 | 4.6 | 4.4 | 5.0 | 3.3 | 1.8 | -0.3 | -5.1 | -12.3 | 2009 | | | | | | | | | | | | | | |
| 2009 | 7.6 | 8.0 | 7.4 | 7.1 | 6.7 | 6.5 | 6.1 | 5.9 | 6.0 | 6.7 | 5.5 | 4.8 | 3.9 | 1.9 | 1.6 | 17.7 | 2010 | | | | | | | | | | | | | |
| 2010 | 7.8 | 8.2 | 7.6 | 7.3 | 7.0 | 6.8 | 6.5 | 6.4 | 6.5 | 7.2 | 6.2 | 5.7 | 5.2 | 4.0 | 4.5 | 14.0 | 10.5 | 2011 | | | | | | | | | | | | |
| 2011 | 7.4 | 7.7 | 7.2 | 6.8 | 6.6 | 6.3 | 6.0 | 5.9 | 5.9 | 6.4 | 5.5 | 4.9 | 4.4 | 3.3 | 3.5 | 9.4 | 5.4 | 0.6 | 2012 | | | | | | | | | | | |
| 2012 | 7.5 | 7.9 | 7.4 | 7.1 | 6.8 | 6.6 | 6.3 | 6.2 | 6.3 | 6.8 | 6.1 | 5.6 | 5.3 | 4.5 | 4.8 | 9.7 | 7.1 | 5.4 | 10.5 | 2013 | | | | | | | | | | |
| 2013 | 7.7 | 8.1 | 7.6 | 7.3 | 7.1 | 6.9 | 6.7 | 6.6 | 6.7 | 7.2 | 6.6 | 6.2 | 6.0 | 5.4 | 5.9 | 10.0 | 8.1 | 7.3 | 10.9 | 11.3 | 2014 | | | | | | | | | |
| 2014 | 7.7 | 8.1 | 7.6 | 7.4 | 7.2 | 7.0 | 6.8 | 6.7 | 6.8 | 7.3 | 6.7 | 6.4 | 6.2 | 5.8 | 6.2 | 9.7 | 8.1 | 7.5 | 10.0 | 9.7 | 8.1 | 2015 | | | | | | | | |
| 2015 | 7.5 | 7.8 | 7.4 | 7.1 | 6.9 | 6.7 | 6.5 | 6.4 | 6.5 | 6.9 | 6.4 | 6.1 | 5.9 | 5.4 | 5.8 | 8.6 | 7.2 | 6.5 | 8.1 | 7.3 | 5.4 | 2.7 | 2016 | | | | | | | |
| 2016 | 7.6 | 7.8 | 7.4 | 7.2 | 7.0 | 6.8 | 6.6 | 6.6 | 6.6 | 7.1 | 6.5 | 6.3 | 6.1 | 5.7 | 6.1 | 8.6 | 7.4 | 6.9 | 8.2 | 7.6 | 6.4 | 5.6 | 8.6 | 2017 | | | | | | |
| 2017 | 7.5 | 7.8 | 7.4 | 7.2 | 7.0 | 6.8 | 6.7 | 6.6 | 6.7 | 7.0 | 6.6 | 6.3 | 6.2 | 5.8 | 6.2 | 8.4 | 7.3 | 6.9 | 8.0 | 7.5 | 6.6 | 6.1 | 7.8 | 6.9 | 2018 | | | | | |
| 2018 | 7.1 | 7.3 | 6.9 | 6.7 | 6.5 | 6.3 | 6.1 | 6.1 | 6.1 | 6.4 | 5.9 | 5.7 | 5.5 | 5.1 | 5.3 | 7.3 | 6.2 | 5.6 | 6.4 | 5.7 | 4.6 | 3.8 | 4.2 | 2.0 | -2.7 | 2019 | | | | |
| 2019 | 7.3 | 7.5 | 7.1 | 6.9 | 6.7 | 6.6 | 6.4 | 6.4 | 6.4 | 6.7 | 6.3 | 6.1 | 5.9 | 5.6 | 5.8 | 7.7 | 6.7 | 6.3 | 7.0 | 6.6 | 5.8 | 5.3 | 6.0 | 5.2 | 4.3 | 11.8 | 2020 | | | |
| 2020 | 7.3 | 7.5 | 7.1 | 6.9 | 6.7 | 6.6 | 6.4 | 6.4 | 6.4 | 6.7 | 6.3 | 6.1 | 6.0 | 5.7 | 5.9 | 7.6 | 6.7 | 6.3 | 7.0 | 6.6 | 5.9 | 5.6 | 6.2 | 5.5 | 5.1 | 9.2 | 6.7 | 2021 | | |
| 2021 | 7.3 | 7.5 | 7.2 | 7.0 | 6.8 | 6.7 | 6.5 | 6.5 | 6.5 | 6.8 | 6.4 | 6.2 | 6.1 | 5.8 | 6.1 | 7.6 | 6.8 | 6.5 | 7.1 | 6.8 | 6.2 | 5.9 | 6.5 | 6.1 | 5.9 | 8.9 | 7.5 | 8.2 | 2022 | |
| 2022 | 6.7 | 6.9 | 6.6 | 6.3 | 6.2 | 6.0 | 5.8 | 5.7 | 5.7 | 6.0 | 5.6 | 5.4 | 5.2 | 4.9 | 5.1 | 6.4 | 5.6 | 5.2 | 5.6 | 5.2 | 4.5 | 4.1 | 4.3 | 3.6 | 2.9 | 4.3 | 2.0 | -0.3 | -8.2 | 2023 |
| 2023 | 6.8 | 7.0 | 6.7 | 6.5 | 6.3 | 6.2 | 6.0 | 6.0 | 6.0 | 6.2 | 5.8 | 5.6 | 5.5 | 5.2 | 5.4 | 6.7 | 6.0 | 5.6 | 6.0 | 5.6 | 5.1 | 4.8 | 5.0 | 4.5 | 4.1 | 5.5 | 4.1 | 3.2 | 0.8 | 10.5 |
| 2024 | 7.0 | 7.1 | 6.8 | 6.6 | 6.5 | 6.3 | 6.2 | 6.1 | 6.1 | 6.4 | 6.0 | 5.9 | 5.7 | 5.5 | 5.7 | 6.9 | 6.2 | 5.9 | 6.4 | 6.0 | 5.6 | 5.3 | 5.6 | 5.2 | 5.0 | 6.3 | 5.3 | 4.9 | 3.8 | 10.4 |
| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |

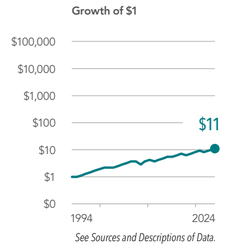



*See Sources and Descriptions of Data.*

# Dimensional Core Plus Index Allocation

## 60% Equity, 40% Fixed Income

1994–2024 in CAD



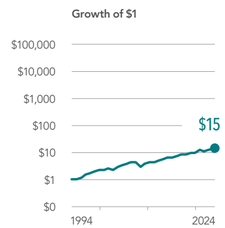

*See Sources and Descriptions of Data.*

| | 1994 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1994 | 2.9 | 1995 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995 | 9.4 | 16.4 | 1996 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1996 | 11.4 | 15.9 | 15.5 | 1997 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997 | 12.0 | 15.1 | 14.5 | 13.6 | 1998 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1998 | 11.6 | 13.9 | 13.0 | 11.8 | 10.1 | 1999 | | | | | | | | | | | | | | | | | | | | | | | |
| 1999 | 11.9 | 13.8 | 13.2 | 12.4 | 11.8 | 13.5 | 2000 | | | | | | | | | | | | | | | | | | | | | | |
| 2000 | 11.3 | 12.7 | 12.0 | 11.2 | 10.4 | 10.5 | 7.5 | 2001 | | | | | | | | | | | | | | | | | | | | | |
| 2001 | 10.4 | 11.5 | 10.7 | 9.8 | 8.8 | 8.4 | 6.0 | 4.4 | 2002 | | | | | | | | | | | | | | | | | | | | |
| 2002 | 8.8 | 9.6 | 8.6 | 7.5 | 6.4 | 5.5 | 2.9 | 0.7 | -2.9 | 2003 | | | | | | | | | | | | | | | | | | | |
| 2003 | 9.7 | 10.5 | 9.8 | 9.0 | 8.3 | 7.9 | 6.5 | 6.2 | 7.1 | 18.3 | 2004 | | | | | | | | | | | | | | | | | | |
| 2004 | 9.9 | 10.7 | 10.1 | 9.4 | 8.8 | 8.6 | 7.6 | 7.7 | 8.8 | 15.2 | 12.1 | 2005 | | | | | | | | | | | | | | | | | |
| 2005 | 10.1 | 10.7 | 10.2 | 9.6 | 9.1 | 9.0 | 8.3 | 8.4 | 9.4 | 13.9 | 11.7 | 11.4 | 2006 | | | | | | | | | | | | | | | | |
| 2006 | 10.3 | 11.0 | 10.5 | 10.0 | 9.6 | 9.6 | 9.0 | 9.2 | 10.2 | 13.8 | 12.4 | 12.5 | 13.6 | 2007 | | | | | | | | | | | | | | | |
| 2007 | 9.7 | 10.2 | 9.8 | 9.2 | 8.8 | 8.7 | 8.1 | 8.2 | 8.8 | 11.3 | 9.6 | 8.8 | 7.6 | 1.9 | 2008 | | | | | | | | | | | | | | |
| 2008 | 7.4 | 7.7 | 7.1 | 6.4 | 5.8 | 5.4 | 4.5 | 4.1 | 4.1 | 5.3 | 2.9 | 0.7 | -2.6 | -9.9 | -20.3 | 2009 | | | | | | | | | | | | | |
| 2009 | 8.3 | 8.7 | 8.2 | 7.6 | 7.1 | 6.9 | 6.2 | 6.1 | 6.3 | 7.7 | 6.0 | 4.8 | 3.2 | 0.0 | -1.0 | 23.1 | 2010 | | | | | | | | | | | | |
| 2010 | 8.6 | 8.9 | 8.4 | 8.0 | 7.5 | 7.3 | 6.8 | 6.7 | 7.0 | 8.3 | 6.9 | 6.1 | 5.1 | 3.0 | 3.4 | 17.8 | 12.7 | 2011 | | | | | | | | | | | |
| 2011 | 8.0 | 8.3 | 7.8 | 7.3 | 6.8 | 6.6 | 6.0 | 5.9 | 6.0 | 7.1 | 5.8 | 4.9 | 3.9 | 2.0 | 2.0 | 10.8 | 5.1 | -1.9 | 2012 | | | | | | | | | | |
| 2012 | 8.2 | 8.5 | 8.0 | 7.6 | 7.2 | 7.0 | 6.5 | 6.4 | 6.6 | 7.6 | 6.4 | 5.7 | 5.0 | 3.6 | 3.9 | 11.1 | 7.4 | 4.8 | 11.9 | 2013 | | | | | | | | | |
| 2013 | 8.5 | 8.8 | 8.4 | 8.0 | 7.7 | 7.5 | 7.1 | 7.1 | 7.3 | 8.3 | 7.4 | 6.8 | 6.3 | 5.3 | 5.9 | 12.0 | 9.4 | 8.4 | 13.9 | 16.0 | 2014 | | | | | | | | |
| 2014 | 8.6 | 8.9 | 8.5 | 8.1 | 7.8 | 7.6 | 7.3 | 7.2 | 7.5 | 8.4 | 7.5 | 7.1 | 6.6 | 5.8 | 6.3 | 11.6 | 9.4 | 8.6 | 12.3 | 12.6 | 9.3 | 2015 | | | | | | | |
| 2015 | 8.3 | 8.6 | 8.2 | 7.8 | 7.5 | 7.3 | 7.0 | 6.9 | 7.1 | 7.9 | 7.1 | 6.7 | 6.2 | 5.4 | 5.9 | 10.2 | 8.2 | 7.4 | 9.8 | 9.1 | 5.9 | 2.6 | 2016 | | | | | | |
| 2016 | 8.4 | 8.7 | 8.3 | 8.0 | 7.7 | 7.6 | 7.2 | 7.2 | 7.4 | 8.2 | 7.4 | 7.0 | 6.7 | 6.0 | 6.5 | 10.4 | 8.7 | 8.0 | 10.1 | 9.7 | 7.7 | 6.9 | 11.5 | 2017 | | | | | |
| 2017 | 8.5 | 8.7 | 8.4 | 8.1 | 7.8 | 7.7 | 7.4 | 7.3 | 7.5 | 8.3 | 7.6 | 7.2 | 6.9 | 6.3 | 6.8 | 10.3 | 8.8 | 8.3 | 10.0 | 9.7 | 8.2 | 7.8 | 10.5 | 9.6 | 2018 | | | | |
| 2018 | 7.9 | 8.1 | 7.8 | 7.5 | 7.2 | 7.0 | 6.7 | 6.7 | 6.8 | 7.4 | 6.7 | 6.4 | 6.0 | 5.4 | 5.7 | 8.7 | 7.2 | 6.6 | 7.9 | 7.2 | 5.5 | 4.6 | 5.3 | 2.4 | -4.4 | 2019 | | | |
| 2019 | 8.2 | 8.4 | 8.1 | 7.8 | 7.5 | 7.4 | 7.1 | 7.1 | 7.2 | 7.9 | 7.3 | 6.9 | 6.6 | 6.1 | 6.5 | 9.3 | 8.0 | 7.5 | 8.7 | 8.3 | 7.1 | 6.6 | 7.7 | 6.5 | 4.9 | 15.2 | 2020 | | |
| 2020 | 8.2 | 8.4 | 8.1 | 7.8 | 7.5 | 7.4 | 7.1 | 7.1 | 7.3 | 7.8 | 7.3 | 7.0 | 6.7 | 6.2 | 6.5 | 9.1 | 8.0 | 7.5 | 8.6 | 8.2 | 7.1 | 6.8 | 7.6 | 6.7 | 5.8 | 11.3 | 7.5 | 2021 | |
| 2021 | 8.4 | 8.6 | 8.3 | 8.0 | 7.8 | 7.7 | 7.4 | 7.4 | 7.6 | 8.1 | 7.6 | 7.3 | 7.1 | 6.7 | 7.0 | 9.5 | 8.4 | 8.0 | 9.1 | 8.8 | 7.9 | 7.7 | 8.6 | 8.0 | 7.6 | 12.0 | 10.4 | 13.4 | 2022 |
| 2022 | 7.7 | 7.9 | 7.6 | 7.3 | 7.1 | 7.0 | 6.7 | 6.6 | 6.7 | 7.3 | 6.7 | 6.4 | 6.1 | 5.7 | 5.9 | 8.1 | 7.0 | 6.6 | 7.4 | 6.9 | 6.0 | 5.6 | 6.0 | 5.1 | 4.3 | 6.6 | 3.8 | 2.0 | -8.2 | 2023 |
| 2023 | 7.9 | 8.1 | 7.8 | 7.5 | 7.3 | 7.2 | 6.9 | 6.9 | 7.0 | 7.5 | 7.0 | 6.7 | 6.5 | 6.1 | 6.3 | 8.4 | 7.4 | 7.0 | 7.8 | 7.4 | 6.6 | 6.3 | 6.8 | 6.2 | 5.6 | 7.8 | 6.0 | 5.5 | 1.7 | 12.7 | 2024 |
| 2024 | 8.1 | 8.2 | 8.0 | 7.7 | 7.5 | 7.4 | 7.2 | 7.2 | 7.3 | 7.8 | 7.3 | 7.1 | 6.8 | 6.5 | 6.7 | 8.7 | 7.8 | 7.5 | 8.2 | 7.9 | 7.2 | 7.0 | 7.5 | 7.1 | 6.7 | 8.7 | 7.4 | 7.4 | 5.4 | 13.0 | 13.3 |
| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |

# Dimensional Core Plus Index Allocation

## 80% Equity, 20% Fixed Income

1994–2024 in CAD




*See Sources and Descriptions of Data.*

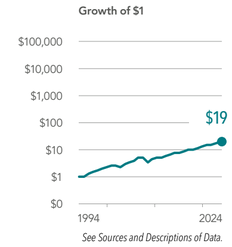
| | 1994 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1994 | 4.0 | 1995 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995 | 9.9 | 16.2 | 1996 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1996 | 12.7 | 17.4 | 18.6 | 1997 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997 | 13.6 | 17.0 | 17.4 | 16.2 | 1998 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1998 | 12.8 | 15.2 | 14.8 | 13.0 | 10.0 | 1999 | | | | | | | | | | | | | | | | | | | | | | | |
| 1999 | 13.6 | 15.6 | 15.5 | 14.4 | 13.6 | 17.3 | 2000 | | | | | | | | | | | | | | | | | | | | | | |
| 2000 | 12.7 | 14.2 | 13.8 | 12.6 | 11.5 | 12.3 | 7.4 | 2001 | | | | | | | | | | | | | | | | | | | | | |
| 2001 | 11.4 | 12.5 | 11.9 | 10.6 | 9.2 | 9.0 | 5.1 | 2.8 | 2002 | | | | | | | | | | | | | | | | | | | | |
| 2002 | 9.2 | 9.9 | 9.0 | 7.5 | 5.8 | 4.8 | 0.9 | -2.2 | -6.9 | 2003 | | | | | | | | | | | | | | | | | | | |
| 2003 | 10.5 | 11.2 | 10.6 | 9.5 | 8.5 | 8.2 | 6.0 | 5.5 | 6.9 | 22.8 | 2004 | | | | | | | | | | | | | | | | | | |
| 2004 | 10.9 | 11.6 | 11.1 | 10.2 | 9.3 | 9.2 | 7.7 | 7.8 | 9.5 | 18.7 | 14.7 | 2005 | | | | | | | | | | | | | | | | | |
| 2005 | 11.2 | 11.9 | 11.4 | 10.7 | 10.0 | 10.0 | 8.8 | 9.1 | 10.8 | 17.4 | 14.7 | 14.8 | 2006 | | | | | | | | | | | | | | | | |
| 2006 | 11.6 | 12.3 | 11.9 | 11.3 | 10.8 | 10.9 | 10.0 | 10.4 | 12.0 | 17.3 | 15.5 | 15.9 | 17.1 | 2007 | | | | | | | | | | | | | | | |
| 2007 | 10.9 | 11.4 | 11.0 | 10.3 | 9.8 | 9.8 | 8.8 | 9.1 | 10.1 | 13.9 | 11.8 | 10.8 | 8.9 | 1.3 | 2008 | | | | | | | | | | | | | | |
| 2008 | 7.7 | 8.0 | 7.4 | 6.5 | 5.7 | 5.3 | 4.0 | 3.6 | 3.7 | 5.6 | 2.4 | -0.4 | -5.0 | -14.4 | -27.7 | 2009 | | | | | | | | | | | | | |
| 2009 | 8.9 | 9.3 | 8.8 | 8.1 | 7.4 | 7.2 | 6.2 | 6.1 | 6.5 | 8.6 | 6.4 | 4.8 | 2.4 | -2.0 | -3.7 | 28.3 | 2010 | | | | | | | | | | | | |
| 2010 | 9.3 | 9.6 | 9.2 | 8.5 | 8.0 | 7.8 | 7.0 | 6.9 | 7.4 | 9.3 | 7.5 | 6.4 | 4.8 | 1.9 | 2.2 | 21.4 | 14.9 | 2011 | | | | | | | | | | | |
| 2011 | 8.5 | 8.7 | 8.3 | 7.6 | 7.0 | 6.8 | 6.0 | 5.9 | 6.2 | 7.7 | 6.0 | 4.8 | 3.2 | 0.6 | 0.5 | 12.1 | 4.8 | -4.4 | 2012 | | | | | | | | | | |
| 2012 | 8.7 | 9.0 | 8.5 | 7.9 | 7.4 | 7.2 | 6.5 | 6.4 | 6.8 | 8.2 | 6.7 | 5.8 | 4.5 | 2.6 | 2.9 | 12.3 | 7.4 | 3.9 | 12.9 | 2013 | | | | | | | | | |
| 2013 | 9.3 | 9.5 | 9.2 | 8.7 | 8.2 | 8.1 | 7.5 | 7.5 | 7.9 | 9.3 | 8.0 | 7.3 | 6.4 | 5.0 | 5.6 | 13.9 | 10.6 | 9.2 | 16.7 | 20.6 | 2014 | | | | | | | | |
| 2014 | 9.3 | 9.6 | 9.2 | 8.7 | 8.3 | 8.2 | 7.6 | 7.6 | 8.0 | 9.4 | 8.2 | 7.6 | 6.8 | 5.6 | 6.2 | 13.3 | 10.5 | 9.4 | 14.4 | 15.2 | 10.0 | 2015 | | | | | | | |
| 2015 | 9.0 | 9.2 | 8.9 | 8.4 | 8.0 | 7.8 | 7.3 | 7.3 | 7.6 | 8.8 | 7.7 | 7.1 | 6.3 | 5.2 | 5.7 | 11.6 | 9.0 | 7.9 | 11.2 | 10.6 | 6.0 | 2.1 | 2016 | | | | | | |
| 2016 | 9.2 | 9.4 | 9.1 | 8.7 | 8.3 | 8.2 | 7.7 | 7.7 | 8.0 | 9.2 | 8.2 | 7.7 | 7.0 | 6.1 | 6.6 | 11.9 | 9.8 | 8.9 | 11.8 | 11.5 | 8.7 | 8.0 | 14.2 | 2017 | | | | | |
| 2017 | 9.3 | 9.5 | 9.2 | 8.8 | 8.5 | 8.4 | 7.9 | 7.9 | 8.3 | 9.4 | 8.5 | 8.0 | 7.5 | 6.6 | 7.2 | 12.0 | 10.1 | 9.4 | 11.9 | 11.7 | 9.5 | 9.4 | 13.2 | 12.2 | 2018 | | | | |
| 2018 | 8.6 | 8.8 | 8.5 | 8.1 | 7.7 | 7.6 | 7.1 | 7.1 | 7.4 | 8.3 | 7.4 | 6.9 | 6.3 | 5.5 | 5.9 | 10.0 | 8.1 | 7.3 | 9.1 | 8.5 | 6.2 | 5.3 | 6.3 | 2.6 | -6.2 | 2019 | | | |
| 2019 | 9.0 | 9.2 | 8.9 | 8.5 | 8.2 | 8.1 | 7.7 | 7.7 | 7.9 | 8.9 | 8.1 | 7.6 | 7.2 | 6.4 | 6.9 | 10.7 | 9.1 | 8.5 | 10.2 | 9.8 | 8.1 | 7.8 | 9.2 | 7.6 | 5.4 | 18.4 | 2020 | | |
| 2020 | 8.9 | 9.1 | 8.9 | 8.5 | 8.2 | 8.1 | 7.7 | 7.7 | 7.9 | 8.8 | 8.1 | 7.7 | 7.2 | 6.5 | 6.9 | 10.5 | 9.0 | 8.4 | 9.9 | 9.6 | 8.1 | 7.8 | 8.9 | 7.6 | 6.1 | 12.9 | 7.7 | 2021 | |
| 2021 | 9.3 | 9.5 | 9.2 | 8.9 | 8.6 | 8.5 | 8.1 | 8.2 | 8.5 | 9.3 | 8.6 | 8.3 | 7.9 | 7.3 | 7.7 | 11.1 | 9.8 | 9.3 | 10.8 | 10.6 | 9.4 | 9.3 | 10.5 | 9.8 | 9.2 | 14.9 | 13.1 | 18.8 | 2022 |
| 2022 | 8.6 | 8.8 | 8.5 | 8.2 | 7.9 | 7.8 | 7.4 | 7.4 | 7.6 | 8.4 | 7.7 | 7.3 | 6.9 | 6.3 | 6.6 | 9.6 | 8.3 | 7.8 | 8.9 | 8.5 | 7.3 | 7.0 | 7.7 | 6.6 | 5.5 | 8.7 | 5.6 | 4.6 | -8.0 | 2023 |
| 2023 | 8.8 | 9.0 | 8.8 | 8.4 | 8.1 | 8.1 | 7.7 | 7.7 | 7.9 | 8.7 | 8.0 | 7.7 | 7.3 | 6.7 | 7.1 | 9.9 | 8.7 | 8.3 | 9.4 | 9.1 | 8.0 | 7.8 | 8.5 | 7.7 | 7.0 | 9.8 | 7.8 | 7.8 | 2.7 | 14.6 | 2024 |
| 2024 | 9.1 | 9.2 | 9.0 | 8.7 | 8.4 | 8.4 | 8.0 | 8.0 | 8.3 | 9.0 | 8.4 | 8.1 | 7.8 | 7.3 | 7.6 | 10.3 | 9.2 | 8.8 | 9.9 | 9.7 | 8.7 | 8.6 | 9.4 | 8.8 | 8.3 | 10.9 | 9.5 | 9.9 | 7.1 | 15.5 | 16.4 |
| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |



# Dimensional Core Plus Index Allocation

## 100% Equity

1994–2024 in CAD

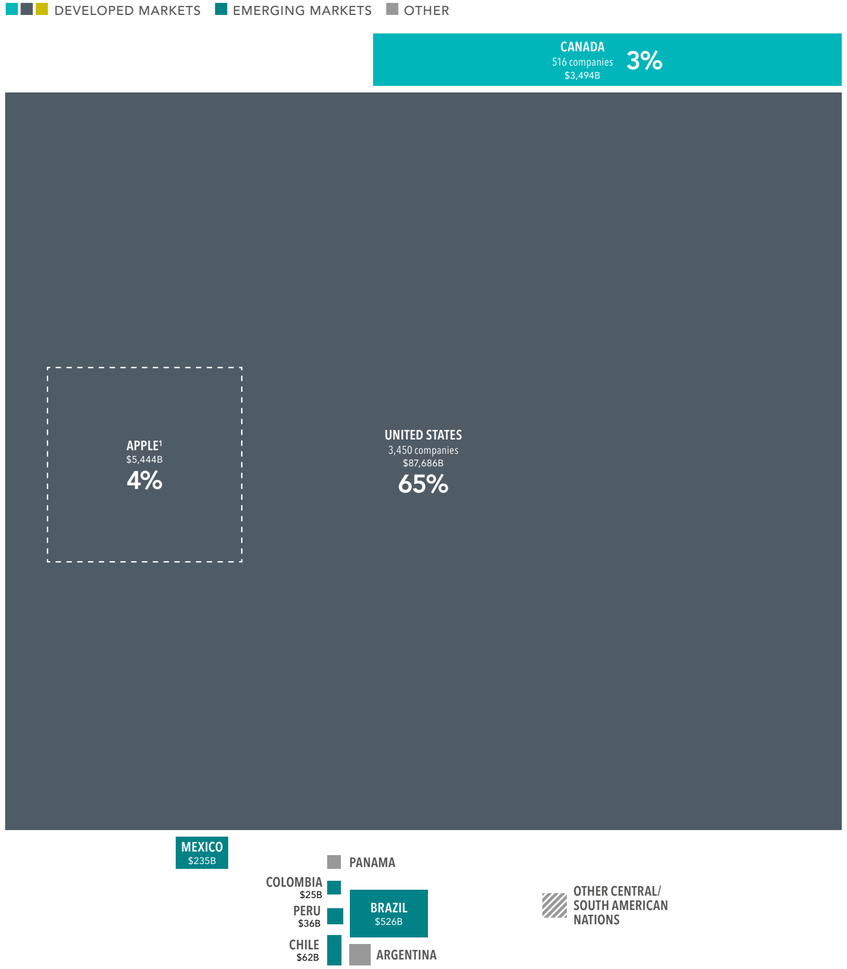



*See Sources and Descriptions of Data.*

| | 1994 | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1994 | 5.1 | 1995 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1995 | 10.4 | 15.9 | 1996 | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1996 | 14.1 | 18.8 | 21.9 | 1997 | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1997 | 15.2 | 18.8 | 20.3 | 18.7 | 1998 | | | | | | | | | | | | | | | | | | | | | | | | |
| 1998 | 14.1 | 16.4 | 16.6 | 14.1 | 9.6 | 1999 | | | | | | | | | | | | | | | | | | | | | | | |
| 1999 | 15.3 | 17.4 | 17.8 | 16.4 | 15.3 | 21.3 | 2000 | | | | | | | | | | | | | | | | | | | | | | |
| 2000 | 14.1 | 15.6 | 15.6 | 14.0 | 12.5 | 14.0 | 7.1 | 2001 | | | | | | | | | | | | | | | | | | | | | |
| 2001 | 12.4 | 13.4 | 13.0 | 11.3 | 9.6 | 9.5 | 4.1 | 1.1 | 2002 | | | | | | | | | | | | | | | | | | | | |
| 2002 | 9.5 | 10.1 | 9.2 | 7.3 | 5.1 | 4.0 | -1.2 | -5.1 | -10.9 | 2003 | | | | | | | | | | | | | | | | | | | |
| 2003 | 11.2 | 11.8 | 11.3 | 9.9 | 8.5 | 8.3 | 5.3 | 4.7 | 6.5 | 27.2 | 2004 | | | | | | | | | | | | | | | | | | |
| 2004 | 11.7 | 12.4 | 12.0 | 10.8 | 9.7 | 9.7 | 7.6 | 7.7 | 9.9 | 22.1 | 17.2 | 2005 | | | | | | | | | | | | | | | | | |
| 2005 | 12.2 | 12.9 | 12.6 | 11.6 | 10.7 | 10.9 | 9.2 | 9.7 | 11.9 | 20.8 | 17.6 | 18.1 | 2006 | | | | | | | | | | | | | | | | |
| 2006 | 12.8 | 13.5 | 13.3 | 12.5 | 11.8 | 12.1 | 10.8 | 11.4 | 13.6 | 20.7 | 18.6 | 19.4 | 20.6 | 2007 | | | | | | | | | | | | | | | |
| 2007 | 11.9 | 12.5 | 12.2 | 11.3 | 10.6 | 10.7 | 9.5 | 9.8 | 11.3 | 16.4 | 13.8 | 12.8 | 10.2 | 0.6 | 2008 | | | | | | | | | | | | | | |
| 2008 | 8.0 | 8.2 | 7.7 | 6.6 | 5.5 | 5.1 | 3.5 | 3.0 | 3.3 | 5.8 | 2.0 | -1.4 | -7.2 | -18.6 | -34.2 | 2009 | | | | | | | | | | | | | |
| 2009 | 9.4 | 9.7 | 9.3 | 8.4 | 7.6 | 7.4 | 6.1 | 6.0 | 6.6 | 9.4 | 6.7 | 4.7 | 1.6 | -4.1 | -6.4 | 33.2 | 2010 | | | | | | | | | | | | |
| 2010 | 9.9 | 10.2 | 9.8 | 9.0 | 8.3 | 8.2 | 7.0 | 7.0 | 7.7 | 10.3 | 8.1 | 6.6 | 4.5 | 0.8 | 0.8 | 24.8 | 16.9 | 2011 | | | | | | | | | | | |
| 2011 | 8.9 | 9.1 | 8.7 | 7.9 | 7.1 | 6.9 | 5.8 | 5.7 | 6.2 | 8.3 | 6.1 | 4.6 | 2.5 | -0.8 | -1.1 | 13.3 | 4.4 | -6.7 | 2012 | | | | | | | | | | |
| 2012 | 9.1 | 9.3 | 9.0 | 8.2 | 7.5 | 7.4 | 6.4 | 6.3 | 6.8 | 8.8 | 6.9 | 5.7 | 4.0 | 1.5 | 1.6 | 13.3 | 7.3 | 2.8 | 13.4 | 2013 | | | | | | | | | |
| 2013 | 9.9 | 10.1 | 9.8 | 9.1 | 8.6 | 8.5 | 7.6 | 7.7 | 8.2 | 10.2 | 8.6 | 7.7 | 6.5 | 4.6 | 5.2 | 15.6 | 11.6 | 9.9 | 19.2 | 25.3 | 2014 | | | | | | | | |
| 2014 | 9.9 | 10.1 | 9.8 | 9.2 | 8.7 | 8.6 | 7.8 | 7.9 | 8.4 | 10.2 | 8.8 | 8.0 | 6.9 | 5.3 | 6.0 | 14.7 | 11.3 | 10.0 | 16.2 | 17.6 | 10.4 | 2015 | | | | | | | |
| 2015 | 9.5 | 9.7 | 9.4 | 8.8 | 8.3 | 8.2 | 7.4 | 7.4 | 7.9 | 9.5 | 8.2 | 7.4 | 6.4 | 4.9 | 5.4 | 12.8 | 9.7 | 8.3 | 12.4 | 12.1 | 6.0 | 1.7 | 2016 | | | | | | |
| 2016 | 9.8 | 10.0 | 9.8 | 9.2 | 8.7 | 8.7 | 8.0 | 8.0 | 8.5 | 10.0 | 8.8 | 8.1 | 7.3 | 6.0 | 6.6 | 13.3 | 10.7 | 9.7 | 13.3 | 13.2 | 9.5 | 9.0 | 16.8 | 2017 | | | | | |
| 2017 | 10.0 | 10.2 | 10.0 | 9.4 | 9.0 | 9.0 | 8.3 | 8.4 | 8.9 | 10.3 | 9.2 | 8.6 | 7.9 | 6.8 | 7.4 | 13.4 | 11.2 | 10.4 | 13.5 | 13.5 | 10.7 | 10.9 | 15.8 | 14.7 | 2018 | | | | |
| 2018 | 9.2 | 9.4 | 9.1 | 8.6 | 8.1 | 8.1 | 7.4 | 7.4 | 7.8 | 9.1 | 8.0 | 7.3 | 6.6 | 5.5 | 5.9 | 11.1 | 8.8 | 7.9 | 10.1 | 9.6 | 6.7 | 5.8 | 7.2 | 2.7 | -8.0 | 2019 | | | |
| 2019 | 9.7 | 9.9 | 9.6 | 9.1 | 8.7 | 8.6 | 8.0 | 8.1 | 8.5 | 9.8 | 8.7 | 8.2 | 7.5 | 6.6 | 7.1 | 12.0 | 10.0 | 9.3 | 11.5 | 11.2 | 9.0 | 8.7 | 10.5 | 8.5 | 5.6 | 21.2 | 2020 | | |
| 2020 | 9.6 | 9.8 | 9.5 | 9.0 | 8.6 | 8.6 | 8.0 | 8.1 | 8.4 | 9.6 | 8.7 | 8.2 | 7.5 | 6.7 | 7.1 | 11.6 | 9.8 | 9.1 | 11.0 | 10.7 | 8.8 | 8.5 | 9.9 | 8.3 | 6.2 | 14.2 | 7.5 | 2021 | |
| 2021 | 10.1 | 10.3 | 10.1 | 9.6 | 9.3 | 9.2 | 8.7 | 8.8 | 9.2 | 10.4 | 9.5 | 9.1 | 8.5 | 7.8 | 8.3 | 12.5 | 10.9 | 10.4 | 12.3 | 12.2 | 10.6 | 10.7 | 12.2 | 11.3 | 10.5 | 17.5 | 15.7 | 24.4 | 2022 |
| 2022 | 9.4 | 9.6 | 9.4 | 8.9 | 8.5 | 8.5 | 8.0 | 8.0 | 8.3 | 9.4 | 8.5 | 8.1 | 7.5 | 6.7 | 7.2 | 11.0 | 9.4 | 8.8 | 10.3 | 10.0 | 8.5 | 8.2 | 9.2 | 8.0 | 6.7 | 10.7 | 7.4 | 7.4 | -7.4 | 2023 |
| 2023 | 9.7 | 9.8 | 9.6 | 9.2 | 8.8 | 8.8 | 8.3 | 8.4 | 8.7 | 9.7 | 8.9 | 8.5 | 8.0 | 7.3 | 7.7 | 11.3 | 9.9 | 9.4 | 10.8 | 10.6 | 9.2 | 9.1 | 10.1 | 9.1 | 8.2 | 11.8 | 9.6 | 10.3 | 3.8 | 16.3 | 2024 |
| 2024 | 10.0 | 10.1 | 9.9 | 9.5 | 9.2 | 9.2 | 8.7 | 8.8 | 9.1 | 10.2 | 9.4 | 9.0 | 8.6 | 7.9 | 8.4 | 11.8 | 10.5 | 10.1 | 11.5 | 11.3 | 10.1 | 10.1 | 11.1 | 10.4 | 9.8 | 13.1 | 11.5 | 12.5 | 8.8 | 17.9 | 19.5 |
| | 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |

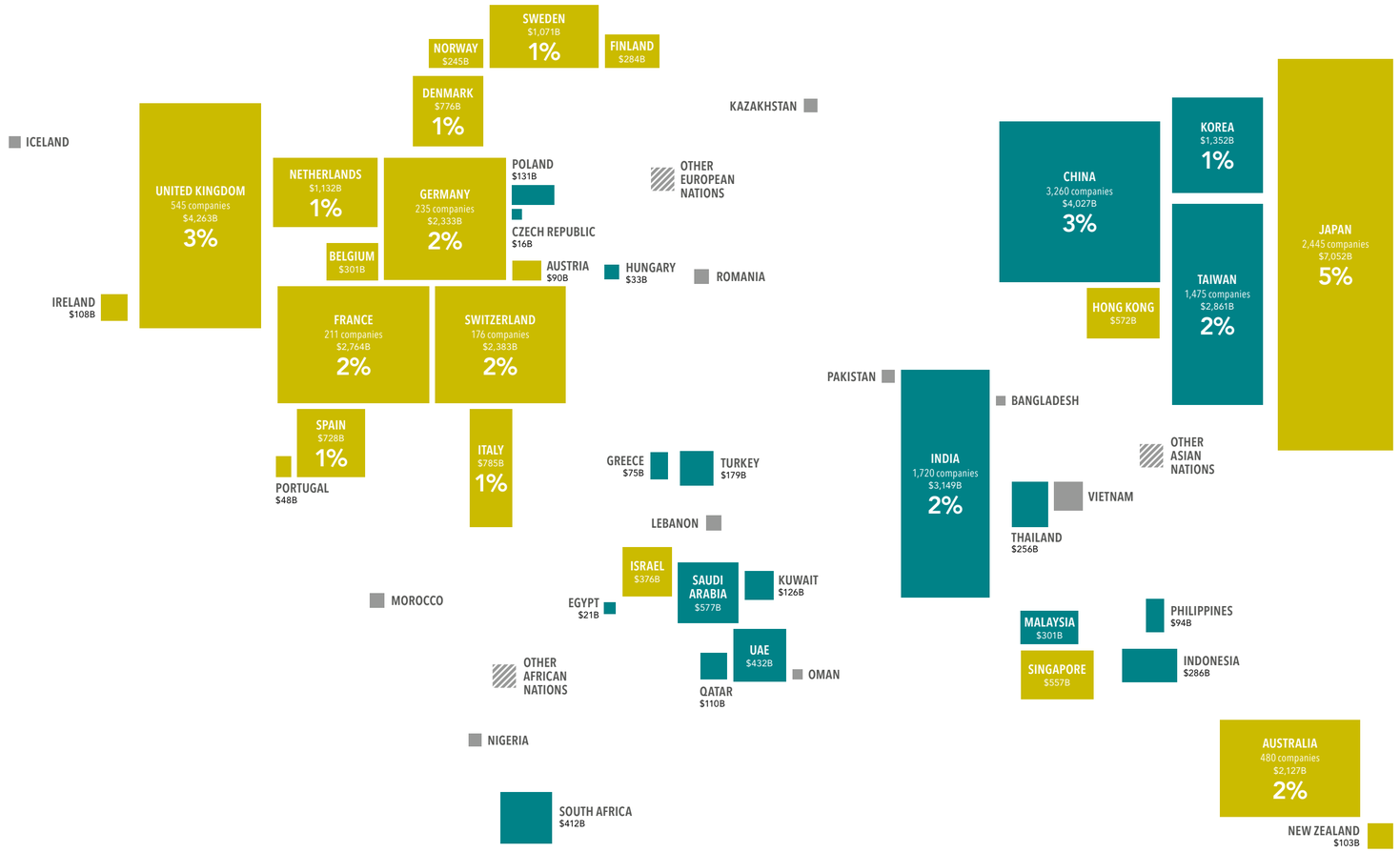
# World Equity Market Capitalization

As of December 31, 2024




How do we measure the world? Thinking only in terms of landmass can distort investment decisions. Directly comparing the markets of nations produces some surprising results.

Measures such as population, gross domestic product, or exports do not directly indicate the size or suitability of investments in a market. This cartogram illustrates the balance of equity investment opportunities around the world. The size of each country has been adjusted to reflect its total relative capitalization. Of course, the world is in motion—there is no fixed relationship between markets, and their proportions can change over time. Viewing the world this way brings the scope of diversification into new light and helps clarify allocation decisions.




## BY ASSET CLASS

1. An example large cap stock provided for comparison. Percentage is of world market cap. This information is intended for educational purposes and should not be considered a recommendation to buy or sell a particular security. Named securities may be held in accounts managed by Dimensional.

## BY COUNTRY

| Country | $ Billions | Companies |
|---|---|---|
| United States | 87,686 | 3,450 |
| Japan | 7,052 | 2,445 |
| United Kingdom | 4,263 | 545 |
| China | 4,027 | 3,260 |
| Canada | 3,494 | 516 |
| India | 3,149 | 1,720 |
| Taiwan | 2,861 | 1,475 |
| France | 2,764 | 211 |
| Switzerland | 2,383 | 176 |
| Germany | 2,333 | 235 |
| Australia | 2,127 | 480 |
| Korea | 1,352 | 1,479 |
| Netherlands | 1,132 | 76 |
| Sweden | 1,071 | 301 |

| Country | $ Billions | Companies |
|---|---|---|
| Italy | 785 | 159 |
| Denmark | 776 | 68 |
| Spain | 728 | 82 |
| Saudi Arabia | 577 | 321 |
| Hong Kong | 572 | 202 |
| Singapore | 557 | 122 |
| Brazil | 526 | 211 |
| UAE | 432 | 94 |
| South Africa | 412 | 113 |
| Israel | 376 | 250 |
| Belgium | 301 | 69 |
| Malaysia | 301 | 333 |
| Indonesia | 286 | 207 |
| Finland | 284 | 76 |

| Country | $ Billions | Companies |
|---|---|---|
| Thailand | 256 | 264 |
| Norway | 245 | 147 |
| Mexico | 235 | 55 |
| Turkey | 179 | 444 |
| Vietnam | 131 | 368 |
| Poland | 131 | 90 |
| Kuwait | 126 | 113 |
| Qatar | 110 | 45 |
| Ireland | 108 | 20 |
| New Zealand | 103 | 44 |
| Philippines | 94 | 49 |
| Austria | 90 | 34 |
| Greece | 75 | 50 |
| Argentina | 63 | 57 |

| Country | $ Billions | Companies |
|---|---|---|
| Chile | 62 | 35 |
| Portugal | 48 | 16 |
| Peru | 36 | 10 |
| Lebanon | 35 | 11 |
| Morocco | 34 | 57 |
| Romania | 33 | 42 |
| Hungary | 33 | 7 |
| Kazakhstan | 29 | 16 |
| Pakistan | 26 | 145 |
| Nigeria | 26 | 44 |
| Colombia | 25 | 15 |
| Egypt | 21 | 68 |
| Iceland | 21 | 27 |
| Oman | 19 | 55 |

| Country | $ Billions | Companies |
|---|---|---|
| Czech Republic | 16 | 5 |
| Bangladesh | 15 | 88 |
| Panama | 14 | 12 |
| Croatia | 13 | 42 |
| Slovenia | 12 | 26 |
| Jordan | 12 | 39 |
| Sri Lanka | 10 | 74 |
| Bahrain | 9 | 29 |
| Jamaica | 9 | 34 |
| Mauritius | 9 | 33 |
| Kenya | 8 | 21 |
| Senegal | 6 | 3 |
| Trinidad and Tobago | 5 | 14 |
| Serbia | 5 | 8 |

| Country | $ Billions | Companies |
|---|---|---|
| Luxembourg | 4 | 8 |
| Ecuador | 4 | 12 |
| Bulgaria | 4 | 48 |
| Côte D'Ivoire | 4 | 22 |
| Tunisia | 3 | 31 |
| Estonia | 3 | 10 |
| Botswana | 3 | 17 |
| Lithuania | 2 | 14 |
| Ghana | 2 | 11 |
| Burkina Faso | 1 | 3 |
| Namibia | 1 | 8 |
| Ukraine | 1 | 6 |
| Zambia | 1 | 10 |
| Slovakia | 1 | 5 |

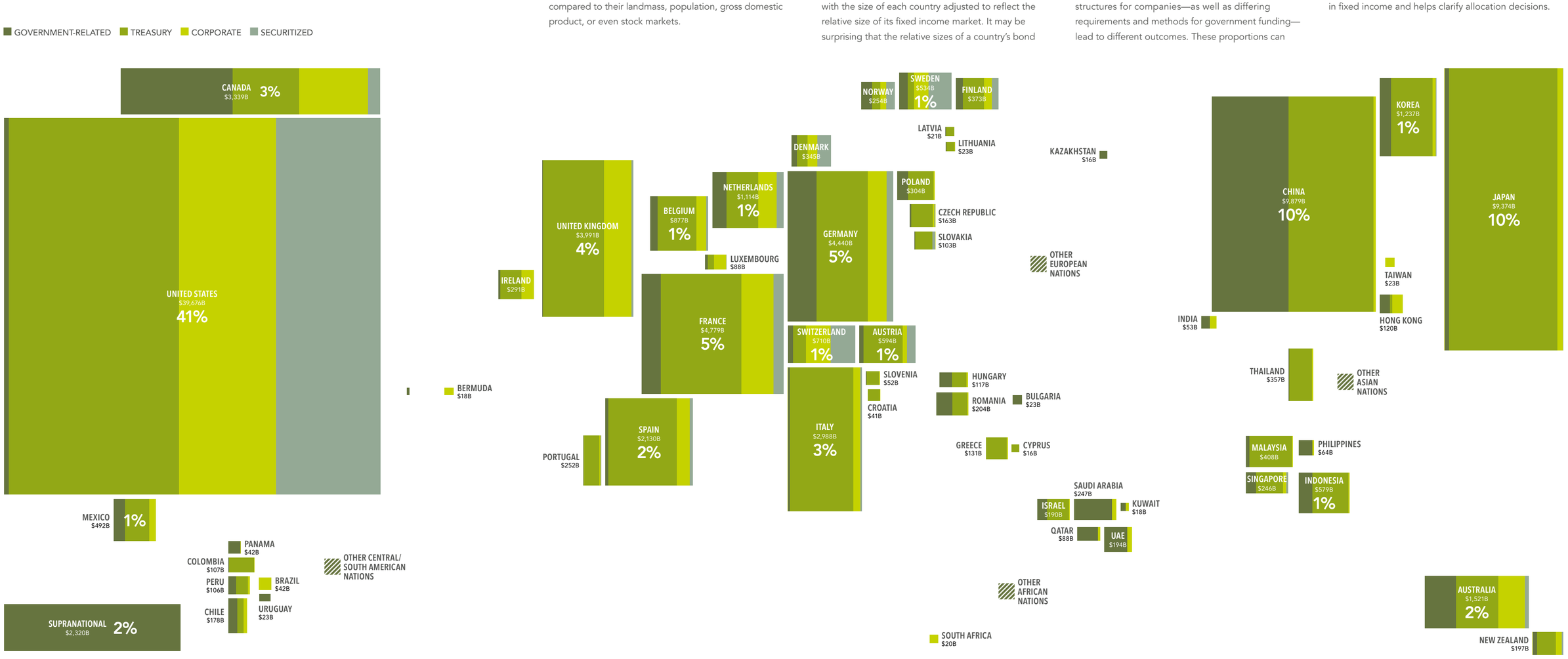
In CAD. Market cap data is free-float adjusted and meets minimum liquidity and listing requirements. Dimensional makes case-by-case determinations about the suitability of investing in each emerging market, making considerations that include local market accessibility, government stability, and property rights before making investments. China A-shares that are available for foreign investors through the Hong Kong Stock Connect program are included in China. 30% foreign ownership limit and 25% inclusion factor are applied to China A-shares. Many nations not displayed. Totals may not equal 100% due to rounding. For educational purposes; should not be used as investment advice. Bloomberg data provided by Bloomberg. **Diversification neither assures a profit nor guarantees against loss in a declining market.**

# Global Bond Market

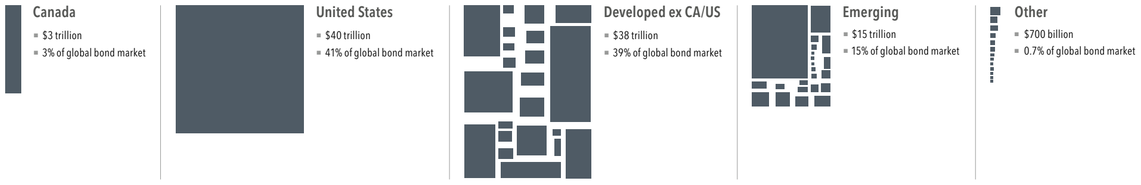
As of December 31, 2024

**Viewing the world in terms of bond markets produces** a very different perspective on countries and regions, as compared to their landmass, population, gross domestic product, or even stock markets.

This cartogram shows the balance of the investment-grade fixed income opportunities around the world, with the size of each country adjusted to reflect the relative size of its fixed income market. It may be surprising that the relative sizes of a country's bond and equity markets are not necessarily the same. Different regulations and preferences regarding capital structures for companies—as well as differing requirements and methods for government funding—lead to different outcomes. These proportions can change over time, but viewing the fixed income world this way highlights opportunities for diversification in fixed income and helps clarify allocation decisions.




## BY ASSET CLASS




## BY COUNTRY

| Country | $ Billions |
|---|---|
| United States | 39,676 |
| China | 9,879 |
| Japan | 9,374 |
| France | 4,779 |
| Germany | 4,440 |
| United Kingdom | 3,991 |
| Canada | 3,339 |
| Italy | 2,988 |
| Supranational | 2,320 |
| Spain | 2,130 |
| Australia | 1,521 |
| Korea | 1,237 |

| Country | $ Billions |
|---|---|
| Netherlands | 1,114 |
| Belgium | 877 |
| Switzerland | 710 |
| Austria | 594 |
| Indonesia | 579 |
| Sweden | 534 |
| Mexico | 492 |
| Malaysia | 408 |
| Finland | 373 |
| Thailand | 357 |
| Denmark | 345 |
| Poland | 304 |

| Country | $ Billions |
|---|---|
| Ireland | 291 |
| Norway | 254 |
| Portugal | 252 |
| Saudi Arabia | 247 |
| Singapore | 246 |
| Romania | 204 |
| New Zealand | 197 |
| UAE | 194 |
| Israel | 190 |
| Chile | 178 |
| Czech Republic | 163 |
| Greece | 131 |

| Country | $ Billions |
|---|---|
| Hong Kong | 120 |
| Hungary | 117 |
| Colombia | 107 |
| Peru | 106 |
| Slovakia | 103 |
| Luxembourg | 88 |
| Qatar | 88 |
| Philippines | 64 |
| India | 53 |
| Slovenia | 52 |
| Brazil | 42 |
| Panama | 42 |

| Country | $ Billions |
|---|---|
| Croatia | 41 |
| Bulgaria | 23 |
| Lithuania | 23 |
| Taiwan | 23 |
| Uruguay | 23 |
| Latvia | 21 |
| South Africa | 20 |
| Bermuda | 18 |
| Kuwait | 18 |
| Kazakhstan | 16 |
| Cyprus | 16 |
| Estonia | 8 |

| Country | $ Billions |
|---|---|
| Iceland | 8 |
| Macao | 7 |
| Malta | 2 |
| Andorra | 1 |
| Jersey | 1 |
| Bahrain | 1 |
| Liechtenstein | 1 |

In CAD. Data is from Bloomberg Global Aggregate Bond Index. The index excludes noninvestment-grade securities, bonds with less than one year to maturity, tax-exempt municipal securities, linked bonds, and floating-rate issues. The treasury sector includes both nominal and inflation-linked native currency debt issued by central governments, which are backed by the full faith and credit of a central government. Government-related sector groups are issuers with government affiliations, including agencies, sovereigns, supranationals, and local authorities. The corporate sector categorizes issuers based on primary lines of business, revenue streams, and operations used to service debt and includes industrials, financial institutions, and utilities.

The securitized sector is designed to capture fixed income instruments whose payments are backed or directly derived from a pool of assets protected or ring-fenced from the credit of a particular issuer (either by a bankruptcy remote special purpose vehicle or bond covenant). Underlying collateral for securitized bonds can include residential mortgages, commercial mortgages, public-sector loans, auto loans, or credit card payments. Many nations are not displayed. Totals may not equal 100% due to rounding. For educational purposes; should not be used as investment advice. Bloomberg data provided by Bloomberg. **Diversification neither assures a profit nor guarantees against loss in a declining market.**

# The Randomness of Global Equity Returns

As of December 31, 2024

**These two tables rank historical annual stock market** performance for different developed and emerging markets from highest to lowest in each year.

Each colour corresponds to a different country, and the patchwork dispersion of colours shows no predictable pattern in either the developed or the emerging markets. Investors who follow a structured, diversified strategy are therefore more likely to capture the returns wherever they happen to occur in any given year.

This diversified strategy also reduces the risk of being too heavily invested in any one country that happens to perform particularly badly in any given year.

## Developed Markets Annual Returns (%)

HIGH ↑ RETURNS ↓ LOW

| 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Canada 25.1 | Spain 48.8 | Finland 26.1 | Japan −11.5 | Norway 58.9 | Sweden 26.8 | Ireland 16.5 | Belgium 36.5 | Finland 55.8 | USA 22.8 | Denmark 48.0 | Canada 20.3 | Austria 47.9 | Finland 5.3 | New Zealand 31.2 | Denmark 41.2 | Austria 40.3 | Portugal 7.5 | Italy 33.4 | Singapore 44.2 |
| Japan 22.4 | Portugal 46.8 | Hong Kong 19.8 | Switzerland −13.1 | Australia 49.8 | Denmark 23.9 | New Zealand 8.2 | Denmark 28.4 | Ireland 50.6 | New Zealand 17.0 | Ireland 39.7 | New Zealand 14.3 | Hong Kong 27.2 | New Zealand 4.7 | Ireland 30.5 | Netherlands 22.0 | Netherlands 26.5 | Hong Kong 2.2 | Spain 28.4 | USA 35.9 |
| Austria 21.5 | Ireland 46.3 | Germany 14.7 | USA −21.9 | Singapore 47.7 | Hong Kong 16.8 | USA 3.9 | Singapore 28.1 | USA 40.6 | Denmark 15.7 | Belgium 34.4 | Norway 9.4 | Singapore 26.7 | USA 3.5 | Switzerland 25.6 | Sweden 21.7 | USA 25.4 | Denmark 2.1 | Denmark 27.7 | Austria 29.0 |
| Denmark 21.4 | Singapore 46.1 | Norway 11.5 | Spain −25.7 | Sweden 39.4 | Singapore 15.8 | UK −0.1 | Germany 28.0 | Germany 40.2 | Hong Kong 14.5 | Japan 31.4 | Australia 7.6 | Denmark 25.8 | Hong Kong 0.5 | Netherlands 25.4 | USA 18.6 | Canada 24.9 | UK 2.1 | USA 23.1 | Ireland 24.3 |
| Norway 21.1 | Norway 44.6 | Canada 9.9 | France −29.0 | Hong Kong 36.0 | Canada 14.2 | Switzerland −4.5 | New Zealand 26.4 | Spain 40.1 | Belgium 13.5 | Austria 24.1 | Austria 7.4 | Netherlands 23.5 | Norway −0.4 | USA 24.3 | Finland 18.3 | Norway 21.0 | Australia 1.6 | Netherlands 22.5 | Canada 22.0 |
| Finland 13.8 | Sweden 42.8 | Singapore 8.9 | Canada −31.8 | Belgium 33.7 | Japan 9.4 | Norway −7.8 | Hong Kong 25.4 | Netherlands 40.1 | Singapore 12.3 | Italy 22.7 | USA 7.1 | France 20.3 | Switzerland −0.9 | Denmark 21.7 | New Zealand 17.8 | Sweden 20.8 | Norway −0.3 | Ireland 21.0 | Italy 21.3 |
| Switzerland 13.4 | Denmark 38.2 | Australia 8.8 | Germany −32.3 | Canada 32.6 | USA 8.8 | Belgium −8.4 | Austria 23.1 | Belgium 36.2 | Ireland 11.5 | Finland 22.3 | France 1.3 | Italy 20.0 | Singapore −1.3 | Canada 21.1 | Ireland 13.0 | France 18.5 | Spain −0.5 | Sweden 20.5 | Germany 20.2 |
| Australia 13.1 | Belgium 36.1 | Denmark 6.5 | Singapore −34.1 | New Zealand 27.7 | Australia 8.5 | Australia −8.8 | Australia 19.4 | Japan 35.7 | Canada 10.7 | Netherlands 21.5 | Netherlands 1.2 | Norway 19.8 | Portugal −3.1 | Italy 20.9 | Japan 12.5 | Switzerland 18.3 | Singapore −4.5 | Germany 19.7 | Spain 19.8 |
| Singapore 11.5 | Austria 36.0 | Portugal 5.2 | Denmark −34.4 | Spain 21.8 | Switzerland 6.0 | Netherlands −9.9 | Sweden 19.3 | Switzerland 35.1 | Switzerland 8.9 | Portugal 21.0 | Portugal 0.0 | Germany 19.3 | Australia −4.1 | France 19.4 | Portugal 12.4 | Denmark 18.0 | Belgium −6.1 | France 18.1 | Belgium 18.4 |
| Netherlands 11.0 | Germany 35.5 | Spain 5.1 | Netherlands −35.2 | UK 21.7 | Norway 5.2 | Spain −10.1 | France 18.6 | France 34.8 | Finland 8.2 | USA 20.8 | Germany −0.8 | Spain 18.7 | France −4.9 | Portugal 17.4 | Switzerland 9.7 | UK 17.5 | Canada −6.5 | Japan 17.1 | Japan 18.1 |
| Sweden 7.5 | France 34.0 | Netherlands 2.3 | UK −35.4 | Austria 21.6 | Finland 4.5 | Canada −10.6 | Netherlands 17.9 | Denmark 33.7 | Australia 5.3 | Switzerland 20.5 | Japan −1.2 | Japan 15.8 | Japan −5.0 | Australia 16.7 | Germany 9.6 | Italy 14.0 | France −7.0 | Austria 14.1 | UK 17.3 |
| Germany 7.2 | Italy 32.0 | France −4.0 | Sweden −37.3 | Netherlands 20.8 | Austria 4.1 | Japan −12.2 | Switzerland 17.7 | Sweden 32.9 | Netherlands 5.2 | France 19.8 | Hong Kong −1.3 | Portugal 15.7 | Netherlands −5.3 | Sweden 15.1 | Australia 6.8 | Australia 8.5 | New Zealand −7.3 | Switzerland 12.6 | Netherlands 10.6 |
| France 7.1 | Netherlands 30.9 | New Zealand −7.6 | Italy −37.4 | Portugal 19.2 | UK 3.1 | Sweden −13.9 | Norway 16.0 | UK 28.8 | Japan 4.6 | Hong Kong 19.3 | Singapore −2.1 | Switzerland 14.5 | Sweden −5.9 | UK 14.9 | Hong Kong 4.0 | Finland 8.1 | Italy −8.2 | Canada 12.3 | Australia 10.4 |
| Belgium 6.3 | Australia 30.4 | UK −8.1 | Australia −38.3 | Denmark 16.0 | Germany 2.8 | Denmark −13.9 | USA 12.8 | Italy 28.5 | Spain 3.9 | Germany 17.7 | Sweden −2.9 | Finland 14.4 | UK −6.4 | Germany 14.7 | Canada 3.5 | Ireland 7.6 | Finland −9.1 | Australia 11.7 | Hong Kong 9.2 |
| Hong Kong 5.7 | UK 30.1 | Italy −10.1 | Hong Kong −39.0 | France 12.0 | New Zealand 2.7 | Hong Kong −13.9 | UK 12.7 | Austria 21.0 | UK 3.1 | Sweden 13.9 | UK −3.6 | UK 14.3 | Denmark −7.8 | Belgium 14.2 | France 2.2 | Singapore 4.8 | Japan −10.6 | UK 11.0 | New Zealand 7.4 |
| UK 4.7 | Hong Kong 29.9 | USA −10.6 | Portugal −40.2 | Italy 7.5 | Netherlands −3.6 | France −14.8 | Finland 12.0 | New Zealand 18.7 | Sweden 0.8 | New Zealand 12.4 | Spain −4.4 | USA 13.2 | Spain −8.6 | Japan 13.6 | Italy 0.0 | Germany 4.4 | Switzerland −12.4 | Portugal 4.7 | Switzerland 6.9 |
| USA 2.5 | Finland 29.4 | Switzerland −10.7 | New Zealand −42.2 | USA 7.2 | Belgium −5.6 | Singapore −15.9 | Italy 10.0 | Hong Kong 18.5 | Italy −1.4 | UK 10.9 | Finland −8.0 | Sweden 12.7 | Canada −9.7 | Singapore 9.2 | Norway −3.5 | Belgium 1.3 | USA −14.0 | New Zealand 3.3 | Sweden 5.0 |
| Spain 1.8 | Switzerland 26.9 | Austria −13.3 | Finland −43.9 | Switzerland 6.4 | France −9.1 | Germany −16.1 | Canada 6.7 | Portugal 18.4 | France −1.8 | Australia 8.0 | Switzerland −8.2 | Australia 12.1 | Italy −10.3 | Austria 8.7 | Austria −5.0 | Japan 0.8 | Germany −16.7 | Belgium 3.1 | Norway 4.4 |
| Italy −0.7 | Canada 17.4 | Sweden −14.7 | Norway −55.3 | Germany 6.3 | Portugal −15.9 | Portugal −21.1 | Japan 5.8 | Norway 16.7 | Germany −2.3 | Norway 2.0 | Ireland −10.3 | Belgium 10.8 | Germany −15.2 | Spain 6.3 | Spain −6.5 | Spain 0.5 | Ireland −20.9 | Norway 3.0 | France 3.3 |
| New Zealand −0.8 | New Zealand 16.1 | Belgium −17.5 | Belgium −58.1 | Ireland −4.7 | Italy −19.4 | Italy −21.3 | Ireland 3.4 | Canada 12.7 | Norway −15.0 | Spain 1.2 | Belgium −10.8 | Ireland 10.4 | Ireland −18.6 | Norway 4.8 | Singapore −9.1 | Portugal −0.7 | Austria −21.1 | Singapore 2.5 | Finland 1.1 |
| Portugal −4.3 | USA 14.2 | Japan −18.8 | Austria −60.5 | Finland −5.6 | Ireland −22.4 | Finland −30.2 | Portugal 1.2 | Australia 11.2 | Austria −23.4 | Singapore −1.3 | Italy −13.6 | Canada 8.4 | Belgium −20.3 | Hong Kong 4.8 | Belgium −9.7 | Hong Kong −4.7 | Netherlands −22.5 | Finland −8.1 | Denmark −5.0 |
| Ireland −4.7 | Japan 5.8 | Ireland −32.2 | Ireland −64.9 | Japan −9.8 | Spain −26.0 | Austria −34.9 | Spain 0.7 | Singapore 8.5 | Portugal −32.7 | Canada −9.0 | Denmark −18.7 | New Zealand 4.4 | Austria −20.9 | Finland 3.9 | UK −12.0 | New Zealand −17.8 | Sweden −23.2 | Hong Kong −17.1 | Portugal −18.4 |

In CAD. MSCI country indices (net dividends) for each country listed. Does not include Israel, which MSCI classified as an emerging market prior to May 2010.

## Emerging Markets Annual Returns (%)

HIGH ↑ RETURNS ↓ LOW

| 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Egypt 155.0 | China 82.2 | Peru 64.8 | Colombia −6.3 | Brazil 93.7 | Thailand 47.6 | Indonesia 8.6 | Turkey 60.6 | Taiwan 16.4 | Egypt 41.0 | Hungary 63.5 | Brazil 60.5 | Poland 44.6 | Peru 10.7 | Egypt 34.6 | Korea 42.1 | Czech Rep. 53.7 | Turkey 104.3 | Hungary 46.8 | Taiwan 46.6 |
| Colombia 102.0 | Indonesia 73.1 | Brazil 52.3 | Chile −19.7 | Indonesia 92.1 | Peru 45.3 | Malaysia 2.6 | Egypt 43.8 | Egypt 15.4 | Indonesia 38.0 | India 12.6 | Peru 50.2 | China 43.9 | Brazil 8.5 | Taiwan 29.5 | Taiwan 38.5 | India 25.2 | Chile 28.0 | Poland 44.6 | Malaysia 31.7 |
| Korea 53.0 | Peru 61.5 | Turkey 47.6 | South Africa −22.3 | India 72.2 | Chile 36.6 | Philippines 1.6 | Philippines 43.2 | Malaysia 14.9 | Philippines 36.9 | Korea 11.9 | Hungary 30.7 | Korea 37.6 | Czech Rep. 4.2 | Colombia 24.2 | China 27.2 | Taiwan 25.1 | Brazil 22.4 | Egypt 37.8 | China 30.3 |
| Brazil 52.5 | Philippines 57.5 | India 46.8 | Peru −25.2 | Turkey 67.7 | Colombia 35.9 | Thailand −0.3 | Poland 36.2 | Korea 10.9 | India 35.0 | Philippines 11.8 | Thailand 22.2 | Chile 32.9 | Thailand 3.0 | Brazil 19.9 | India 13.5 | Mexico 21.5 | Peru 17.4 | Mexico 37.1 | Turkey 28.4 |
| Turkey 52.2 | India 50.4 | China 41.0 | Malaysia −26.5 | Chile 57.6 | Malaysia 29.9 | Colombia −2.7 | Colombia 32.9 | China 10.6 | Turkey 29.4 | China 10.5 | Colombia 22.1 | Hungary 30.8 | Malaysia 2.4 | China 17.2 | Malaysia 1.8 | Hungary 11.1 | Thailand 12.6 | Peru 33.0 | Peru 26.3 |
| Mexico 45.4 | Brazil 44.7 | Egypt 34.4 | Mexico −28.6 | Colombia 56.5 | South Africa 27.2 | Czech Rep. −3.6 | Thailand 31.5 | Poland 9.5 | Thailand 27.0 | Taiwan 5.9 | Taiwan 14.4 | India 29.6 | Hungary 2.3 | Hungary 13.4 | Mexico −3.6 | Poland 7.5 | Indonesia 11.1 | Czech Rep. 29.6 | Hungary 24.3 |
| Czech Rep. 42.1 | Mexico 40.9 | Czech Rep. 31.7 | Czech Rep. −28.8 | Taiwan 52.2 | Indonesia 26.9 | Korea −9.8 | Mexico 26.2 | Mexico 6.9 | Peru 20.5 | Mexico 2.7 | South Africa 13.8 | Peru 29.3 | India 1.0 | Korea 6.8 | Philippines −5.1 | Egypt 6.6 | Mexico 5.1 | Brazil 29.1 | India 21.3 |
| India 34.1 | Poland 40.1 | Indonesia 30.8 | Taiwan −33.0 | Hungary 50.8 | Philippines 26.9 | Mexico −9.9 | India 23.2 | Philippines 3.8 | Taiwan 19.2 | Chile −1.3 | Indonesia 12.9 | Turkey 29.3 | Taiwan −0.7 | Mexico 5.7 | South Africa −5.6 | South Africa 2.7 | South Africa 3.1 | Taiwan 26.9 | Colombia 17.6 |
| Peru 31.4 | Malaysia 36.6 | Malaysia 23.9 | Thailand −35.6 | Thailand 49.9 | Mexico 21.0 | South Africa −12.2 | Hungary 20.1 | India 2.6 | China 17.7 | Czech Rep. −2.2 | Chile 11.6 | South Africa 27.2 | Indonesia −1.0 | Turkey 5.5 | Czech Rep. −5.7 | Indonesia 1.2 | Malaysia 1.1 | Korea 19.9 | South Africa 16.4 |
| South Africa 25.1 | Czech Rep. 33.4 | Thailand 23.9 | China −38.5 | Peru 46.0 | Korea 20.1 | China −16.4 | China 20.0 | Hungary 0.5 | South Africa 14.7 | Indonesia −3.4 | Korea 5.0 | Czech Rep. 26.6 | Colombia −3.6 | Philippines 4.9 | Peru −6.4 | Thailand −2.2 | Colombia 0.9 | India 17.6 | Czech Rep. 13.4 |
| Poland 21.1 | Hungary 33.2 | Philippines 19.1 | Egypt −40.4 | Korea 45.5 | Taiwan 15.5 | Chile −18.4 | Korea 18.5 | South Africa 0.1 | Czech Rep. 4.2 | Malaysia −4.1 | China −2.6 | Thailand 25.7 | Poland −5.0 | South Africa 4.5 | Chile −7.3 | Philippines −4.7 | India −1.3 | Colombia 9.4 | Thailand 10.5 |
| Philippines 19.5 | Chile 28.2 | Korea 11.8 | Philippines −40.7 | Philippines 40.6 | India 14.6 | Taiwan −18.9 | Peru 17.5 | Czech Rep. −4.5 | Mexico −1.2 | Thailand −8.3 | Poland −3.3 | Taiwan 19.2 | Egypt −6.3 | Thailand 4.0 | Indonesia −9.7 | Malaysia −7.0 | Philippines −7.7 | Indonesia 4.5 | Philippines 8.3 |
| Chile 17.9 | South Africa 20.1 | Poland 6.2 | Poland −43.5 | China 37.8 | Turkey 14.5 | Peru −19.4 | South Africa 16.1 | Thailand −8.9 | Malaysia −2.6 | Egypt −8.4 | India −4.8 | Malaysia 16.8 | Mexico −7.9 | Indonesia 3.6 | Turkey −10.4 | Korea −9.2 | Czech Rep. −8.2 | Chile 0.9 | Poland 1.8 |
| China 16.8 | Taiwan 19.5 | Chile 4.4 | Korea −44.1 | South Africa 34.0 | Poland 9.2 | Brazil −19.9 | Taiwan 14.1 | Brazil −10.4 | Korea −3.1 | Poland −10.5 | Malaysia −7.2 | Philippines 16.4 | Philippines −9.0 | India 2.1 | Poland −12.9 | Colombia −14.6 | China −16.3 | Philippines 0.7 | Chile 0.9 |
| Hungary 15.0 | Egypt 16.6 | South Africa 0.2 | Brazil −45.2 | Mexico 33.0 | Egypt 6.6 | Poland −28.4 | Malaysia 11.7 | Colombia −15.8 | Chile −5.2 | South Africa −10.6 | Czech Rep. −8.3 | Indonesia 16.1 | China −11.6 | Peru −0.5 | Hungary −13.2 | Chile −18.0 | Egypt −17.0 | South Africa −1.2 | Indonesia −5.1 |
| Indonesia 12.2 | Colombia 13.1 | Hungary −0.9 | Indonesia −45.6 | Malaysia 29.1 | Brazil 1.0 | Hungary −32.0 | Chile 5.4 | Chile −16.7 | Brazil −6.3 | Peru −18.0 | Philippines −9.8 | Brazil 16.0 | Chile −12.4 | Czech Rep. −1.0 | Thailand −13.2 | Brazil −18.1 | Poland −22.0 | Malaysia −6.1 | Korea −16.5 |
| Thailand 6.0 | Korea 12.2 | Colombia −2.5 | Hungary −51.9 | Poland 20.2 | China −0.8 | Turkey −33.8 | Indonesia 2.3 | Indonesia −18.3 | Poland −6.5 | Turkey −18.3 | Turkey −11.6 | Colombia 8.7 | Korea −13.8 | Malaysia −7.0 | Colombia −20.4 | Peru −20.6 | Korea −24.2 | Turkey −8.2 | Mexico −20.5 |
| Taiwan 3.7 | Thailand 10.7 | Mexico −4.9 | Turkey −52.8 | Egypt 18.7 | Czech Rep. −7.6 | India −35.6 | Czech Rep. 0.2 | Turkey −21.8 | Colombia −12.6 | Brazil −29.7 | Mexico −12.3 | Mexico 8.4 | South Africa −18.0 | Poland −10.6 | Brazil −20.4 | China −22.4 | Taiwan −24.7 | Thailand −12.9 | Brazil −23.4 |
| Malaysia −0.3 | Turkey −7.6 | Taiwan −8.1 | India −55.8 | Czech Rep. 7.4 | Hungary −14.3 | Egypt −45.5 | Brazil −2.2 | Peru −25.1 | Hungary −20.9 | Colombia −30.2 | Egypt −14.6 | Egypt −1.8 | Turkey −36.1 | Chile −21.1 | Egypt −23.8 | Turkey −29.0 | Hungary −26.1 | China −13.6 | Egypt −24.9 |

In CAD. MSCI country indices (net dividends) for each country listed. Does not include Greece, which MSCI classified as a developed market prior to November 2013, or Russia, which MSCI classified as a standalone market as of March 2022. Additional countries excluded due to data availability or due to downgrades by MSCI from emerging to frontier market. MSCI data © MSCI 2025, all rights reserved. **Past performance is no guarantee of future results.** Indices are not available for direct investment; therefore, their performance does not reflect the expenses associated with the management of an actual portfolio.

# Sources and Descriptions of Data

## US Equities

### S&P 500 INDEX

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### NASDAQ COMPOSITE INDEX

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### RUSSELL 3000 INDEX

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### DIMENSIONAL US SMALL CAP INDEX

**January 1975–present**

Compiled by Dimensional from CRSP and Compustat data. Market-capitalization-weighted index of securities of the smallest US companies whose market capitalization falls in the lowest 8% of the total market capitalization of the eligible market. The eligible market is composed of securities of US companies traded on the NYSE, NYSE MKT (formerly AMEX), and Nasdaq Global Market. Exclusions: non-US companies, REITs, UITs, investment companies, and companies with the lowest profitability and highest relative price within the small cap universe. The index also excludes those companies with the highest asset growth within the small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The index has been retrospectively calculated by Dimensional and did not exist prior to March 2007. Accordingly, the results shown during the periods prior to March 2007 do not represent actual returns of the index. Other periods selected may have different results, including losses. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in December 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

**Prior to January 1975**

Compiled by Dimensional from CRSP and Compustat data. Market-capitalization-weighted index of securities of the smallest US companies whose market capitalization falls in the lowest 8% of the total market capitalization of the eligible market. The eligible market is composed of securities of US companies traded on the NYSE, NYSE MKT (formerly AMEX), and Nasdaq Global Market. Exclusions: non-US companies, REITs, UITs, and investment companies.

### DIMENSIONAL US MARKETWIDE VALUE INDEX

**January 1975–present**

Compiled by Dimensional from CRSP and Compustat data. The eligible universe consists of companies whose relative price is in the bottom 33% of the US market after the exclusion of utilities, companies lacking financial data, and companies with negative relative price. The index emphasizes securities with higher profitability, lower relative price, and lower market capitalization, excluding those with the lowest profitability within the small cap universe. The index also excludes those companies with the highest asset growth within the small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The eligible market is composed of securities of US companies traded on the NYSE, NYSE MKT (formerly AMEX), and Nasdaq Global Market. Exclusions: non-US companies, REITs, UITs, and investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to March 2007. Accordingly, the results shown during the periods prior to March 2007 do not represent actual returns of the index. Other periods selected may have different results, including losses. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in December 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

**Prior to January 1975**

Compiled by Dimensional from CRSP and Compustat data. Market-capitalization-weighted index of securities of all US companies whose relative price is in the bottom 20% of the US Large Cap Index after the exclusion of utilities, companies lacking financial data, and companies with negative relative price. The eligible market is composed of securities of US companies traded on the NYSE, AMEX, and Nasdaq Global Market. Exclusions: non-US companies, REITs, UITs, and investment companies.

### DIMENSIONAL US SMALL CAP VALUE INDEX

**January 1975–present**

Compiled by Dimensional from CRSP and Compustat data. The index composition is a subset of the US Small Cap Index. The subset is defined as companies whose relative price is in the bottom 35% of the US Small Cap Index after the exclusion of utilities, companies lacking financial data, and companies with negative relative price. The eligible market is composed of securities of US companies traded on the NYSE, NYSE MKT (formerly AMEX), and Nasdaq Global Market. Exclusions: non-US companies, REITs, UITs, investment companies, and companies with the lowest profitability within the small cap value universe. The index also excludes those companies with the highest asset growth within the small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The index has been retrospectively calculated by Dimensional and did not exist prior to March 2007. Accordingly, the results shown during the periods prior to March 2007 do not represent actual returns of the index. Other periods selected may have different results, including losses. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in December 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

**Prior to January 1975**

Compiled by Dimensional from CRSP and Compustat data. The index composition is a subset of the US Small Cap Index. The subset is defined as companies whose relative price is in the bottom 25% of the US Small Cap Index after the exclusion of utilities, companies lacking financial data, and companies with negative relative price. The eligible market is composed of securities of US companies traded on the NYSE, NYSE MKT (formerly AMEX), and Nasdaq Global Market. Exclusions: non-US companies, REITs, UITs, and investment companies.

## Canadian Equities

### S&P/TSX COMPOSITE INDEX

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### DIMENSIONAL CANADA SMALL INDEX

**January 1990–present**

Compiled by Dimensional from Bloomberg securities data. Market-capitalization-weighted index of small company securities in the eligible markets, excluding those with the lowest profitability and highest relative price within their country's small cap universe. The index also excludes those companies with the highest asset growth within their country's small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The index monthly returns are computed as the simple average of the monthly returns of four subindices, each one reconstituted once a year at the end of each quarter of the year. Exclusions: REITs and investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to April 2008. Accordingly, the results shown during the periods prior to April 2008 do not represent actual returns of the index. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in November 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

**Prior to January 1990**

Market-capitalization-weighted index of small company securities. The index monthly returns are computed as the simple average of the monthly returns of four subindices, each one reconstituted once a year at the end of each quarter of the year. Exclusions: REITs and investment companies.

### FAMA/FRENCH CANADA VALUE INDEX

Provided by Fama/French from Bloomberg and MSCI data. Consists of companies whose relative price is in the bottom 30% for the region. The index is reconstituted once a year at the end of December.

## International Equities

### MSCI EAFE INDEX

Shown gross of dividend withholding tax. MSCI EAFE Index (gross dividends) © MSCI 2025, all rights reserved.

### DIMENSIONAL INTERNATIONAL SMALL CAP INDEX

**January 1990–present**

Compiled by Dimensional from Bloomberg securities data. Market-capitalization-weighted index of small company securities in the eligible markets, excluding those with the lowest profitability and highest relative price within their country's small cap universe. The index also excludes those companies with the highest asset growth within their country's small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The index monthly returns are computed as the simple average of the monthly returns of four subindices, each one reconstituted once a year at the end of each quarter of the year. Maximum index weight of any one company is capped at 5%. Countries currently included are Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Hong Kong, Ireland, Israel, Italy, Japan, the Netherlands, New Zealand, Norway, Portugal, Singapore, Spain, Sweden, Switzerland, and the UK. Exclusions: REITs and investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to April 2008. Accordingly, the results shown during the periods prior to April 2008 do not represent actual returns of the index. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in November 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

**July 1981–December 1989**

Created by Dimensional. Includes securities of MSCI EAFE countries in the bottom 10% of market capitalization, excluding the bottom 1%. All securities are market capitalization weighted. Each country is capped at 50%. Rebalanced semiannually.

**Prior to July 1981**

50% Hoare Govett Small Companies Index, 50% Nomura Small Companies Index.

### FAMA/FRENCH INTERNATIONAL VALUE INDEX

Provided by Fama/French from Bloomberg and MSCI data. Consists of companies whose relative price is in the bottom 30% for the region. The index is reconstituted once a year at the end of December.

### MSCI EMERGING MARKETS INDEX

Shown gross of dividend withholding tax. MSCI Emerging Markets Index © MSCI 2025, all rights reserved.

### DIMENSIONAL EMERGING MARKETS SMALL INDEX

**January 1994–present**

Compiled by Dimensional from Bloomberg securities data. Market-capitalization-weighted index of small company securities in the eligible markets, excluding those with the lowest profitability and highest relative price within their country's small cap universe. The index also excludes those companies with the highest asset growth within their country's small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The index monthly returns are computed as the simple average of the monthly returns of four subindices, each one reconstituted once a year at the end of each quarter of the year. Maximum index weight of any one company is capped at 5%. Countries currently included are Brazil, Chile, China, Colombia, the Czech Republic, Greece, Hungary, India, Indonesia, Kuwait, Malaysia, Mexico, Peru, the Philippines, Poland, Qatar, Saudi Arabia, South Africa, South Korea, Taiwan, Thailand, Turkey, and the UAE. Exclusions: REITs and investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to April 2008. Accordingly, the results shown during the periods prior to April 2008 do not represent actual returns of the index. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in November 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

**Prior to January 1994**

Fama/French Emerging Markets Small Cap Index.

### MSCI WORLD INDEX

Shown gross of dividend withholding tax. MSCI World Index © MSCI 2025, all rights reserved.

### DIMENSIONAL EMERGING MARKETS VALUE INDEX

Compiled by Dimensional from Bloomberg securities data. Consists of companies whose relative price is in the bottom 33% of their country's respective constituents, after the exclusion of utilities and companies with either negative or missing relative price data. The index emphasizes companies with smaller capitalization, lower relative price, and higher profitability, excluding those with the lowest profitability within their country's small cap universe. The index also excludes those companies with the highest asset growth within their country's small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The index monthly returns are computed as the simple average of the monthly returns of four subindices, each one reconstituted once a year at the end of each quarter of the year. Maximum index weight of any one company is capped at 5%. Countries currently included are Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Hong Kong, Ireland, Israel, Italy, Japan, the Netherlands, New Zealand, Norway, Portugal, Singapore, Spain, Sweden, Switzerland, the UK, and the US. Exclusions: REITs and investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to April 2008. Accordingly, the results shown during the periods prior to April 2008 do not represent actual returns of the index. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in November 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

**July 1981–December 1989**

Dimensional US Small Cap Index and Dimensional International Small Cap Index combined using market cap weights.

**Prior to July 1981**

50% Dimensional US Small Cap Index; 50% Dimensional International Small Cap Index.

### DIMENSIONAL GLOBAL MARKETWIDE VALUE INDEX

Compiled by Dimensional from Bloomberg securities data. Consists of companies whose relative price is in the bottom 33% of their country's respective constituents, after the exclusion of utilities and companies with either negative or missing relative price data. The index emphasizes companies with smaller capitalization, lower relative price, and higher profitability, excluding those with the lowest profitability within their country's small cap universe. The index also excludes those companies with the highest asset growth within their country's small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The index monthly returns are computed as the simple average of the monthly returns of four subindices, each one reconstituted once a year at the end of each quarter of the year. Maximum index weight of any one company is capped at 5%. Countries currently included are Australia, Austria, Belgium, Canada, Denmark, Finland, France, Germany, Hong Kong, Ireland, Israel, Italy, Japan, the Netherlands, New Zealand, Norway, Portugal, Singapore, Spain, Sweden, Switzerland, the UK, and the US. Exclusions: REITs and investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to April 2008. Accordingly, the results shown during the periods prior to April 2008 do not represent actual returns of the index. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in November 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

### S&P GLOBAL REIT INDEX

Shown in gross dividends. S&P Global REIT data © 2025 S&P Dow Jones Indices LLC, a division of S&P Global. All rights reserved.

## Fixed Income

### ONE-MONTH US TREASURY BILLS

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### DIMENSIONAL US 20-YEAR TREASURY INDEX

**February 1999–present**

Compiled by Dimensional from Bloomberg securities data. Based on securities in the universe of the Bloomberg US Treasury Index, the index selects the bond with beginning-of-month maturity closest to 20 years. If there are two bonds with the same time to maturity, the most recently issued bond is selected. Rebalanced monthly. The index has been retrospectively calculated by Dimensional and did not exist prior to February 2025. Accordingly, results shown during the periods prior to February 2025 do not represent actual returns of the index. Other periods selected may have different results, including losses.

**Prior to February 1999**

Morningstar Long-Term Government Bonds.

### FTSE CANADA 30-DAY TREASURY BILLS

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### FTSE CANADA SHORT-TERM BOND INDEX

FTSE fixed income indices © 2025 FTSE Fixed Income LLC. All rights reserved. Includes bonds with remaining effective terms greater than one year and less than or equal to five years.

### FTSE CANADA LONG-TERM BOND INDEX

FTSE fixed income indices © 2025 FTSE Fixed Income LLC. All rights reserved. All maturities greater than 10 years. Includes securities rated BBB or higher.

### FTSE CANADA UNIVERSE BOND INDEX

FTSE fixed income indices © 2025 FTSE Fixed Income LLC. All rights reserved. All maturities greater than one year. Includes securities rated BBB or higher.

### FTSE WORLD GOVERNMENT BOND INDEX 1–5 YEARS (HEDGED TO CAD)

FTSE fixed income indices © 2025 FTSE Fixed Income LLC. All rights reserved. All maturities greater than one year. Includes securities rated BBB or higher.

### BLOOMBERG GLOBAL AGGREGATE BOND INDEX (HEDGED TO CAD)

Bloomberg data provided by Bloomberg.

## Inflation

### INFLATION: CANADIAN CONSUMER PRICE INDEX

Provided by the Bank of Canada. Not seasonally adjusted.

### US DOLLAR VS. CANADIAN DOLLAR

**November 2003–present**

Provided by WM/Reuters from the Bank of Canada. Includes currency returns at London close.

**Prior to November 2003**

Provided by Statistics Canada from the Bank of Canada. Includes currency returns at New York close.

## Index Allocations

### DIMENSIONAL CANADIAN CORE EQUITY INDEX

Compiled by Dimensional from Bloomberg securities data. Targets all the securities in the eligible markets with an emphasis on companies with smaller capitalization, lower relative price, and higher profitability, excluding those with the lowest profitability and highest relative price within their country's small cap universe. The index also excludes those companies with the highest asset growth within their country's small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The index monthly returns are computed as the simple average of the monthly returns of four subindices, each one reconstituted once a year at the end of each quarter of the year. Maximum index weight of any one company is capped at 10%. The country currently included is Canada. Exclusion: investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to April 2008. Accordingly, the results shown during the periods prior to April 2008 do not represent actual returns of the index. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in November 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

### DIMENSIONAL US CORE EQUITY INDEX (CANADA)

**January 1975–present**

Compiled by Dimensional from CRSP and Compustat data. Targets all the securities in the eligible market with an emphasis on companies with smaller capitalization, lower relative price, and higher profitability, excluding those with the lowest profitability and highest relative price within the small cap universe. The index also excludes those companies with the highest asset growth within the small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The eligible market is composed of securities of US companies traded on the NYSE, NYSE MKT (formerly AMEX), and Nasdaq Global Market. Exclusions: non-US companies, REITs, UITs, and investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to November 2007. Accordingly, the results shown during the periods prior to November 2007 do not represent actual returns of the index. Other periods selected may have different results, including losses. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in December 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

**Prior to January 1975**

Targets all the securities in the eligible market with an emphasis on companies with smaller capitalization and lower relative price. The eligible market is composed of securities of US companies traded on the NYSE, NYSE MKT (formerly AMEX), and Nasdaq Global Market. Exclusions: non-US companies, REITs, UITs, and investment companies.

### DIMENSIONAL INTERNATIONAL CORE EQUITY INDEX (CANADA)

Compiled by Dimensional from Bloomberg securities data. Targets all the securities in the eligible markets with an emphasis on companies with smaller capitalization, lower relative price, and higher profitability, excluding those with the lowest profitability and highest relative price within their country's small cap universe. The index also excludes those companies with the highest asset growth within their country's small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The index monthly returns are computed as the simple average of the monthly returns of four subindices, each one reconstituted once a year at the end of each quarter of the year. Maximum index weight of any one company is capped at 5%. Countries currently included are Australia, Austria, Belgium, Brazil, Chile, China, Colombia, the Czech Republic, Denmark, Finland, France, Germany, Greece, Hong Kong, Hungary, India, Indonesia, Ireland, Israel, Italy, Japan, Kuwait, Malaysia, Mexico, the Netherlands, New Zealand, Norway, Peru, the Philippines, Poland, Portugal, Qatar, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan, Thailand, Turkey, the UAE, and the UK. Exclusion: investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to April 2008. Accordingly, the results shown during the periods prior to April 2008 do not represent actual returns of the index. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in November 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

### DIMENSIONAL GLOBAL SHORT-TERM GOVERNMENT VARIABLE MATURITY INDEX (HEDGED TO CAD)

Compiled by Dimensional using FTSE data. Includes securities in the FTSE World Government Bond 1–3 Years and 3–5 Years indices. Countries: Australia, Austria, Belgium, Canada, France, Germany, Japan, the Netherlands, New Zealand, Norway, Spain, Sweden, Switzerland, the UK, and the US. Countries with the steepest yield curves are overweighted with respect to their market cap weight. For countries included, duration corresponds to the steepest segment of that country's yield curve. Rebalanced monthly. The index has been retrospectively calculated by Dimensional and did not exist prior to January 2019. Accordingly, results shown during the periods prior to January 2019 do not represent actual returns of the index. Other periods selected may have different results, including losses.

### DIMENSIONAL GLOBAL TARGETED CREDIT INDEX (HEDGED TO CAD)

**January 2003–present**

Compiled by Dimensional using data provided by Bloomberg. Based on securities in the universe of Bloomberg Global Aggregate Bond Index and Global High Yield Index and includes global investment-grade corporate 1–5 year bonds and global BB corporate 1–5 year bonds only. Eligible currencies: AUD, CAD, CHF, EUR, GBP, JPY, and USD. Within the universe, the index identifies the yield curves that offer higher expected returns, and the duration ranges on those yield curves offering higher expected returns, and assesses the increased expected returns associated with allocation to bonds with different credit qualities. It then overweights (with respect to their market cap weight) bonds of yield curves, duration ranges, and credit qualities that offer higher expected returns. It also employs credit quality, currency, and duration requirements relative to the eligible market. Rebalanced monthly. The index has been retrospectively calculated by Dimensional and did not exist prior to January 2020. Accordingly, results shown during the periods prior to January 2020 do not represent actual returns of the index. Other periods selected may have different results, including losses.

**January 1990–December 2002**

Bloomberg US Aggregate Credit 1–3 Year Index (hedged to CAD).

### DIMENSIONAL GLOBAL ADJUSTED INVESTMENT GRADE BOND INDEX (HEDGED TO CAD)

**February 1999–present**

Compiled by Dimensional using data provided by Bloomberg. Based on securities in the universe of Bloomberg Global Aggregate Bond Index and includes global investment-grade government bonds and global investment-grade corporate bonds. Eligible currencies: AUD, CAD, CHF, EUR, GBP, JPY, and USD. Within the universe, the index identifies the yield curves that offer higher expected returns, and the duration ranges on those yield curves offering higher expected returns, and assesses the increased expected returns associated with allocation to bonds with different credit qualities. It then overweights (with respect to their market cap weight) bonds

### DIMENSIONAL GLOBAL ADJUSTED INVESTMENT GRADE BOND INDEX (HEDGED TO CAD)

**February 1999–present**

Compiled by Dimensional using data provided by Bloomberg. Based on securities in the universe of Bloomberg Global Aggregate Bond Index and includes global investment-grade government bonds and global investment-grade corporate bonds. Eligible currencies: AUD, CAD, CHF, EUR, GBP, JPY, and USD. Within the universe, the index identifies the yield curves that offer higher expected returns, and the duration ranges on those yield curves offering higher expected returns, and assesses the increased expected returns associated with allocation to bonds with different credit qualities. It then overweights (with respect to their market cap weight) bonds of yield curves, duration ranges, and credit qualities that offer higher expected returns. It also employs credit quality, currency, and duration requirements relative to the eligible market. Rebalanced monthly. The index has been retrospectively calculated by Dimensional and did not exist prior to January 2018. Accordingly, results shown during the periods prior to January 2018 do not represent actual returns of the index. Other periods selected may have different results, including losses.

**January 1990–January 1999**

Bloomberg Global Aggregate Bond Index (hedged to CAD).

### DIMENSIONAL CANADIAN VECTOR EQUITY INDEX

Compiled by Dimensional from Bloomberg securities data. Includes companies in the eligible market with lower relative price and/or higher profitability and excludes companies with the lowest profitability and highest relative price within their country's small cap universe. The index also excludes those companies with the highest asset growth within their country's small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The index monthly returns are computed as the simple average of the monthly returns of four subindices, each one reconstituted once a year at the end of each quarter of the year. Maximum index weight of any one company is capped at 10%. Exclusions: REITs and investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to April 2008. Accordingly, the results shown during the periods prior to April 2008 do not represent actual returns of the index. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in November 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

### DIMENSIONAL US CORE EQUITY INDEX (CANADA) (HEDGED TO CAD)

**January 1975–present**

Compiled by Dimensional from CRSP and Compustat data. Targets all the securities in the eligible market with an emphasis on companies with smaller capitalization, lower relative price, and higher profitability, excluding those with the lowest profitability and highest relative price within the small cap universe. The index also excludes those companies with the highest asset growth within the small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The eligible market is composed of securities of US companies traded on the NYSE, NYSE MKT (formerly AMEX), and Nasdaq Global Market. Exclusions: non-US companies, REITs, UITs, and investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to November 2007. Accordingly, the results shown during the periods prior to November 2007 do not represent actual returns of the index. Other periods selected may have different results, including losses. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in December 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

**Prior to January 1975**

Targets all the securities in the eligible market with an emphasis on companies with smaller capitalization and lower relative price. The eligible market is composed of securities of US companies traded on the NYSE, NYSE MKT (formerly AMEX), and Nasdaq Global Market. Exclusions: non-US companies, REITs, UITs, and investment companies.

### DIMENSIONAL US VECTOR EQUITY INDEX (CANADA)

Compiled by Dimensional from CRSP and Compustat data. Includes US companies with lower relative price and/or higher profitability and excludes companies with the lowest profitability and highest relative price within the small cap universe. The index also excludes those companies with the highest asset growth within the small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The index monthly returns are computed as the simple average of the monthly returns of four subindices, each one reconstituted once a year at the end of each quarter of the year. Maximum index weight of any one company is capped at 5%. Countries currently included are Australia, Austria, Belgium, Brazil, Chile, China, Colombia, the Czech Republic, Denmark, Finland, France, Germany, Greece, Hong Kong, Hungary, India, Indonesia, Ireland, Israel, Italy, Japan, Kuwait, Malaysia, Mexico, the Netherlands, New Zealand, Norway, Peru, the Philippines, Poland, Portugal, Qatar, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan, Thailand, Turkey, the UAE, and the UK. Exclusion: investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to April 2008. Accordingly, the results shown during the periods prior to April 2008 do not represent actual returns of the index. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in November 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

### DIMENSIONAL INTERNATIONAL VECTOR EQUITY INDEX (CANADA)

Compiled by Dimensional from Bloomberg securities data. Includes companies in the eligible markets with lower relative price and/or higher profitability and excludes companies with the lowest profitability and highest relative price within their country's small cap universe. The index also excludes those companies with the highest asset growth within their country's small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The index monthly returns are computed as the simple average of the monthly returns of four subindices, each one reconstituted once a year at the end of each quarter of the year. Maximum index weight of any one company is capped at 5%. Countries currently included are Australia, Austria, Belgium, Brazil, Chile, China, Colombia, the Czech Republic, Denmark, Finland, France, Germany, Greece, Hong Kong, Hungary, India, Indonesia, Ireland, Israel, Italy, Japan, Kuwait, Malaysia, Mexico, the Netherlands, New Zealand, Norway, Peru, the Philippines, Poland, Portugal, Qatar, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan, Thailand, Turkey, the UAE, and the UK. Exclusions: REITs and investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to April 2008. Accordingly, the results shown during the periods prior to April 2008 do not represent actual returns of the index. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in November 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

### DIMENSIONAL INTERNATIONAL CORE EQUITY INDEX (CANADA) (HEDGED TO CAD)

Compiled by Dimensional from Bloomberg securities data. Targets all the securities in the eligible markets with an emphasis on companies with smaller capitalization, lower relative price, and higher profitability, excluding those with the lowest profitability and highest relative price within their country's small cap universe. The index also excludes those companies with the highest asset growth within their country's small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The returns are hedged to CAD. The index monthly returns are computed as the simple average of the monthly returns of four subindices, each one reconstituted once a year at the end of each quarter of the year. Maximum index weight of any one company is capped at 5%. Countries currently included are Australia, Austria, Belgium, Brazil, Chile, China, Colombia, the Czech Republic, Denmark, Finland, France, Germany, Greece, Hong Kong, Hungary, India, Indonesia, Ireland, Israel, Italy, Japan, Kuwait, Malaysia, Mexico, the Netherlands, New Zealand, Norway, Peru, the Philippines, Poland, Portugal, Qatar, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan, Thailand, Turkey, the UAE, and the UK. Exclusions: REITs and investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to April 2008. Accordingly, the results shown during the periods prior to April 2008 do not represent actual returns of the index. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in November 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

### DIMENSIONAL INTERNATIONAL VECTOR EQUITY INDEX (CANADA) (HEDGED TO CAD)

Compiled by Dimensional from Bloomberg securities data. Includes companies in the eligible markets with lower relative price and/or higher profitability and excludes companies with the lowest profitability and highest relative price within their country's small cap universe. The index also excludes those companies with the highest asset growth within their country's small cap universe. Profitability is defined as operating income before depreciation and amortization minus interest expense divided by book equity. Asset growth is defined as change in total assets from the prior fiscal year to current fiscal year. The returns are hedged to CAD. The index monthly returns are computed as the simple average of the monthly returns of four subindices, each one reconstituted once a year at the end of each quarter of the year. Maximum index weight of any one company is capped at 5%. Countries currently included are Australia, Austria, Belgium, Brazil, Chile, China, Colombia, the Czech Republic, Denmark, Finland, France, Germany, Greece, Hong Kong, Hungary, India, Indonesia, Ireland, Israel, Italy, Japan, Kuwait, Malaysia, Mexico, the Netherlands, New Zealand, Norway, Peru, the Philippines, Poland, Portugal, Qatar, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Switzerland, Taiwan, Thailand, Turkey, the UAE, and the UK. Exclusions: REITs and investment companies. The index has been retrospectively calculated by Dimensional and did not exist prior to April 2008. Accordingly, the results shown during the periods prior to April 2008 do not represent actual returns of the index. The calculation methodology for the index was amended in January 2014 to include profitability as a factor in selecting securities for inclusion in the index. The calculation methodology for the index was amended in November 2019 to include asset growth as a factor in selecting securities for inclusion in the index.

### DIMENSIONAL CORE 0/100 INDEX ALLOCATION (CANADA)

Dimensional Index Allocation data compiled by Dimensional. The Dimensional Core 0/100 Index Allocation (Canada) is the Dimensional Global Short-Term Government Variable Maturity Index (hedged to CAD) (100%). The Index Allocation has been retrospectively calculated by Dimensional and did not exist prior to March 2020.

### DIMENSIONAL CORE 20/80 INDEX ALLOCATION (CANADA)

Dimensional Index Allocation data compiled by Dimensional. 20% of the weight is allocated to the Dimensional Core 100/0 Index Allocation (Canada), and 80% of the weight is allocated to the following fixed income indices: Dimensional Global Short-Term Government Variable Maturity Index (hedged to CAD) (60%), Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) (10%), and Dimensional Global Targeted Credit Index (hedged to CAD) (10%). The Index Allocation returns are calculated monthly as a weighted average of the returns of the underlying indices. The Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) is represented by the Bloomberg Global Aggregate Bond Index (hedged to CAD) from January 1994 to January 1999. The Dimensional Global Targeted Credit Index (hedged to CAD) is represented by the Bloomberg US Aggregate Credit 1–3 Year Index (hedged to CAD) from January 1994 to December 2002. The Index Allocation has been retrospectively calculated by Dimensional and did not exist prior to March 2020.

### DIMENSIONAL CORE 40/60 INDEX ALLOCATION (CANADA)

Dimensional Index Allocation data compiled by Dimensional. 40% of the weight is allocated to the Dimensional Core 100/0 Index Allocation (Canada), and 60% of the weight is allocated to the following fixed income indices: Dimensional Global Short-Term Government Variable Maturity Index (hedged to CAD) (40%), Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) (10%), and Dimensional Global Targeted Credit Index (hedged to CAD) (10%). The Index Allocation returns are calculated monthly as a weighted average of the returns of the underlying indices. The Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) is represented by the Bloomberg Global Aggregate Bond Index (hedged to CAD) from January 1994 to January 1999. The Dimensional Global Targeted Credit Index (hedged to CAD) is represented by the Bloomberg US Aggregate Credit 1–3 Year Index (hedged to CAD) from January 1994 to December 2002. The Index Allocation has been retrospectively calculated by Dimensional and did not exist prior to March 2020.

### DIMENSIONAL CORE 60/40 INDEX ALLOCATION (CANADA)

Dimensional Index Allocation data compiled by Dimensional. 60% of the weight is allocated to the Dimensional Core 100/0 Index Allocation (Canada), and 40% of the weight is allocated to the following fixed income indices: Dimensional Global Short-Term Government Variable Maturity Index (hedged to CAD) (25%), Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) (10%), and Dimensional Global Targeted Credit Index (hedged to CAD) (5%). The Index Allocation returns are calculated monthly as a weighted average of the returns of the underlying indices. The Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) is represented by the Bloomberg Global Aggregate Bond Index (hedged to CAD) from January 1994 to January 1999. The Dimensional Global Targeted Credit Index (hedged to CAD) is represented by the Bloomberg US Aggregate Credit 1–3 Year Index (hedged to CAD) from January 1994 to December 2002. The Index Allocation has been retrospectively calculated by Dimensional and did not exist prior to March 2020.

### DIMENSIONAL CORE 80/20 INDEX ALLOCATION (CANADA)

Dimensional Index Allocation data compiled by Dimensional. 80% of the weight is allocated to the Dimensional Core 100/0 Index Allocation (Canada), and 20% of the weight is allocated to the following fixed income indices: Dimensional Global Short-Term Government Variable Maturity Index (hedged to CAD) (5%), Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) (10%), and Dimensional Global Targeted Credit Index (hedged to CAD) (5%). The Index Allocation returns are calculated monthly as a weighted average of the returns of the underlying indices. The Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) is represented by the Bloomberg Global Aggregate Bond Index (hedged to CAD) from January 1994 to January 1999. The Dimensional Global Targeted Credit Index (hedged to CAD) is represented by the Bloomberg US Aggregate Credit 1–3 Year Index (hedged to CAD) from January 1994 to December 2002. The Index Allocation has been retrospectively calculated by Dimensional and did not exist prior to March 2020.

### DIMENSIONAL CORE 100/0 INDEX ALLOCATION (CANADA)

Dimensional Index Allocation data compiled by Dimensional. The Dimensional Core 100/0 Index Allocation (Canada) combines the following indices: Dimensional Canadian Core Equity Index (CAD), Dimensional US Core Equity Index (Canada) (CAD), Dimensional International Core Equity Index (Canada) (CAD), and the S&P Global REIT Index (gross dividends) (CAD). The weight of the REIT index is based on the market capitalization weight of equity REITs within the global universe of eligible stocks and equity REITs, rounded to the nearest 1%. Within the remaining non-REIT equity allocation, Canadian equities are held at 33.33%, then rescaled and rounded to the nearest 1%. US and international equities are held at their respective market capitalization weights and then rescaled to sum to the total non-REIT, non-Canadian equity weight of the Index Allocation, rounded to the nearest 1%. Regional weights are determined at each quarter-end and held constant for the next three months. The Index Allocation returns are calculated monthly as a weighted average of the returns of the underlying indices. The Index Allocation has been retrospectively calculated by Dimensional and did not exist prior to March 2020.

### DIMENSIONAL CORE PLUS 0/100 INDEX ALLOCATION (CANADA)

Dimensional Index Allocation data compiled by Dimensional. The Dimensional Core Plus 0/100 Index Allocation (Canada) combines the following indices: Dimensional Global Short-Term Government Variable Maturity Index (hedged to CAD) (85%) and Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) (15%). The Index Allocation returns are calculated monthly as a weighted average of the returns of the underlying indices. The Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) is represented by the Bloomberg Global Aggregate Bond Index (hedged to CAD) from January 1994 to January 1999. The Index Allocation has been retrospectively calculated by Dimensional and did not exist prior to March 2020.

### DIMENSIONAL CORE PLUS 20/80 INDEX ALLOCATION (CANADA)

Dimensional Index Allocation data compiled by Dimensional. 20% of the weight is allocated to global equity indices (described below), and 80% of the weight is allocated to the following fixed income indices: Dimensional Global Short-Term Government Variable Maturity Index (hedged to CAD) (48%), Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) (12%), and Dimensional Global Targeted Credit Index (hedged to CAD) (20%). The equity allocation combines the following indices: Dimensional Canadian Core Equity Index (CAD), Dimensional Canadian Vector Equity Index (CAD), Dimensional US Core Equity Index (Canada) (CAD), Dimensional US Core Equity Index (Canada) (hedged to CAD), Dimensional US Vector Equity Index (Canada) (CAD), Dimensional International Core Equity Index (Canada) (CAD), Dimensional International Core Equity Index (Canada) (hedged to CAD), Dimensional International Vector Equity Index (Canada) (CAD), and the S&P Global REIT Index (gross dividends) (CAD). The weight of the REIT index is fixed at 4% of the equity allocation. Within the remaining non-REIT equity allocation, Canadian equities are held at 33.33%, then rescaled and rounded to the nearest 1%. US and international equities are held at their respective market capitalization weights and then rescaled to sum to the total non-REIT, non-Canada equity weight of the Index Allocation, rounded to the nearest 1%. Regional weights are determined at each quarter-end and held constant for the next three months. Within the Canadian equity allocation, each month the weights are allocated to the core and vector indices at 70% and 30%, respectively. Within each of the US and international equity allocations, each month the weights are allocated to the core, core (hedged to CAD), and vector indices at 52.5%, 17.5%, and 30%, respectively. The Index Allocation returns are calculated monthly as a weighted average of the returns of the underlying indices. The Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) is represented by the

### DIMENSIONAL CORE PLUS 40/60 INDEX ALLOCATION (CANADA)

Dimensional Index Allocation data compiled by Dimensional. 40% of the weight is allocated to global equity indices (described below), and 60% of the weight is allocated to the following fixed income indices: Dimensional Global Short-Term Government Variable Maturity Index (hedged to CAD) (30%), Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) (15%), and Dimensional Global Targeted Credit Index (hedged to CAD) (15%). The equity allocation combines the following indices: Dimensional Canadian Core Equity Index (CAD), Dimensional Canadian Vector Equity Index (CAD), Dimensional US Core Equity Index (Canada) (CAD), Dimensional US Core Equity Index (Canada) (hedged to CAD), Dimensional US Vector Equity Index (Canada) (CAD), Dimensional International Core Equity Index (Canada) (CAD), Dimensional International Core Equity Index (Canada) (hedged to CAD), Dimensional International Vector Equity Index (Canada) (CAD), and the S&P Global REIT Index (gross dividends) (CAD). The weight of the REIT index is fixed at 4% of the equity allocation. Within the remaining non-REIT equity allocation, Canadian equities are held at 33.33%, then rescaled and rounded to the nearest 1%. US and international equities are held at their respective market capitalization weights and then rescaled to sum to the total non-REIT, non-Canada equity weight of the Index Allocation, rounded to the nearest 1%. Regional weights are determined at each quarter-end and held constant for the next three months. Within the Canadian equity allocation, each month the weights are allocated to the core and vector indices at 70% and 30%, respectively. Within each of the US and international equity allocations, each month the weights are allocated to the core, core (hedged to CAD), and vector indices at 35%, 35%, and 30%, respectively. The Index Allocation returns are calculated monthly as a weighted average of the returns of the underlying indices. The Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) is represented by the Bloomberg Global Aggregate Bond Index (hedged to CAD) from January 1994 to January 1999. The Dimensional Global Targeted Credit Index (hedged to CAD) is represented by the Bloomberg US Aggregate Credit 1–3 Year Index (hedged to CAD) from January 1994 to December 2002. The Index Allocation has been retrospectively calculated by Dimensional and did not exist prior to March 2020.

### DIMENSIONAL CORE PLUS 60/40 INDEX ALLOCATION (CANADA)

Dimensional Index Allocation data compiled by Dimensional. 60% of the weight is allocated to global equity indices (described below), and 40% of the weight is allocated to the following fixed income indices: Dimensional Global Short-Term Government Variable Maturity Index (hedged to CAD) (16%), Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) (14%), and Dimensional Global Targeted Credit Index (hedged to CAD) (10%). The equity allocation combines the following indices: Dimensional Canadian Core Equity Index (CAD), Dimensional Canadian Vector Equity Index (CAD), Dimensional US Core Equity Index (Canada) (CAD), Dimensional US Core Equity Index (Canada) (hedged to CAD), Dimensional US Vector Equity Index (Canada) (CAD), Dimensional US Vector Equity Index (Canada) (hedged to CAD), Dimensional International Core Equity Index (Canada) (CAD), Dimensional International Core Equity Index (Canada) (hedged to CAD), Dimensional International Vector Equity Index (Canada) (CAD), Dimensional International Vector Equity Index (Canada) (hedged to CAD), and the S&P Global REIT Index (gross dividends) (CAD). The weight of the REIT index is fixed at 4% of the equity allocation. Within the remaining non-REIT equity allocation, Canadian equities are held at 33.33%, then rescaled and rounded to the nearest 1%. US and international equities are held at their respective market capitalization weights and then rescaled to sum to the total non-REIT, non-Canada equity weight of the Index Allocation, rounded to the nearest 1%. Regional weights are determined at each quarter-end and held constant for the next three months. Within the Canadian equity allocation, each month the weights are allocated to the core and vector indices at 70% and 30%, respectively. Within each of the US and international equity allocations, each month the weights are allocated to the core, core (hedged to CAD), vector, and vector (hedged to CAD) indices at 35%, 35%, 24%, and 6%, respectively. The Index Allocation returns are calculated monthly as a weighted average of the returns of the underlying indices. The Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) is represented by the Bloomberg Global Aggregate Bond Index (hedged to CAD) from January 1994 to January 1999. The Dimensional Global Targeted Credit Index (hedged to CAD) is represented by the Bloomberg US Aggregate Credit 1–3 Year Index (hedged to CAD) from January 1994 to December 2002. The Index Allocation has been retrospectively calculated by Dimensional and did not exist prior to March 2020.

### DIMENSIONAL CORE PLUS 80/20 INDEX ALLOCATION (CANADA)

Dimensional Index Allocation data compiled by Dimensional. 80% of the weight is allocated to global equity indices (described below), and 20% of the weight is allocated to the following fixed income indices: Dimensional Global Short-Term Government Variable Maturity Index (hedged to CAD) (6%), Dimensional Global Adjusted Investment Grade Bond Index (hedged to CAD) (9%), and Dimensional Global Targeted Credit Index (hedged to CAD) (5%). The equity allocation combines the following indices: Dimensional Canadian Core Equity Index (CAD), Dimensional Canadian Vector Equity Index (CAD), Dimensional US Core Equity Index (Canada) (CAD), Dimensional US Core Equity Index (Canada) (hedged to CAD), Dimensional US Vector Equity Index (Canada) (CAD), Dimensional US Vector Equity Index (Canada) (hedged to CAD), Dimensional International Core Equity Index (Canada) (CAD), Dimensional International Core Equity Index (Canada) (hedged to CAD), Dimensional International Vector Equity Index (Canada) (CAD), and the S&P Global REIT Index (gross dividends) (CAD). The weight of the REIT index is fixed at 4% of the equity allocation. Within the remaining non-REIT equity allocation, Canadian equities are held at 33.33%, then rescaled and rounded to the nearest 1%. US and international equities are held at their respective market capitalization weights and then rescaled to sum to the total non-REIT, non-Canada equity weight of the Index Allocation, rounded to the nearest 1%. Regional weights are determined at each quarter-end and held constant for the next three months. Within the Canadian equity allocation, each month the weights are allocated to the core and vector indices at 70% and 30%, respectively. Within each of the US and international equity allocations, each month the weights are allocated to the core, core (hedged to CAD), vector, and vector (hedged to CAD) indices at 35%, 35%, 15%, and 15%, respectively. The Index Allocation returns are calculated monthly as a weighted average of the returns of the underlying indices. The Index Allocation has been retrospectively calculated by Dimensional and did not exist prior to March 2020.

### DIMENSIONAL CORE PLUS 100/0 INDEX ALLOCATION (CANADA)

Dimensional Index Allocation data compiled by Dimensional. The Dimensional Core Plus 100/0 Index Allocation (Canada) combines the following indices: Dimensional Canadian Core Equity Index (CAD), Dimensional Canadian Vector Equity Index (CAD), Dimensional US Core Equity Index (Canada) (CAD), Dimensional US Core Equity Index (Canada) (hedged to CAD), Dimensional US Vector Equity Index (Canada) (CAD), Dimensional US Vector Equity Index (Canada) (hedged to CAD), Dimensional International Core Equity Index (Canada) (CAD), Dimensional International Core Equity Index (Canada) (hedged to CAD), Dimensional International Vector Equity Index (Canada) (CAD), Dimensional International Vector Equity Index (Canada) (hedged to CAD), and the S&P Global REIT Index (gross dividends) (CAD). The weight of the REIT index is fixed at 4% of the equity allocation. Within the remaining non-REIT equity allocation, Canadian equities are held at 33.33%, then rescaled and rounded to the nearest 1%. US and international equities are held at their respective market capitalization weights and then rescaled to sum to the total non-REIT, non-Canada equity weight of the Index Allocation, rounded to the nearest 1%. Regional weights are determined at each quarter-end and held constant for the next three months. Within the Canadian equity allocation, each month the weights are allocated to the core and vector indices at 70% and 30%, respectively. Within each of the US and international equity allocations, each month the weights are allocated to the core, core (hedged to CAD), vector, and vector (hedged to CAD) indices at 35%, 35%, 15%, and 15%, respectively. The Index Allocation returns are calculated monthly as a weighted average of the returns of the underlying indices. The Index Allocation has been retrospectively calculated by Dimensional and did not exist prior to March 2020.

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