

MSCI US Investable Market 2500 Index (USD)

The **MSCI US Investable Market 2500 Index** is designed to measure the performance of the large, mid and small cap segment of the US equity market. The index represents approximately 99% of the free float-adjusted market capitalization in the US equity market.

For a complete description of the index methodology, please see [Index methodology - MSCI](#).

CUMULATIVE INDEX PERFORMANCE – GROSS RETURNS (USD) (APR 2010 – APR 2025)



ANNUAL PERFORMANCE (%)

Year	MSCI US Investable Market 2500	MSCI US Broad Market	MSCI World IMI
2024	23.82	23.81	18.04
2023	26.26	26.21	23.50
2022	-19.24	-19.23	-17.81
2021	26.13	26.10	21.56
2020	21.01	21.02	16.48
2019	31.09	31.07	28.20
2018	-5.27	-5.28	-8.93
2017	21.22	21.21	23.09
2016	12.63	12.67	8.82
2015	0.61	0.57	-0.26
2014	12.71	12.66	5.07
2013	33.51	33.62	28.09
2012	16.40	16.44	16.75
2011	1.15	1.08	-5.53

INDEX PERFORMANCE – GROSS RETURNS (%) (APR 30, 2025)

	1 Mo	3 Mo	1 Yr	YTD	ANNUALIZED				Since May 30, 2003
					3 Yr	5 Yr	10 Yr		
MSCI US Investable Market 2500	-0.69	-8.34	11.27	-5.49	11.43	15.28	11.74	10.55	
MSCI US Broad Market	-0.69	-8.35	11.27	-5.50	11.42	15.27	11.73	10.55	
MSCI World IMI	0.92	-4.37	11.98	-0.98	10.89	14.14	9.58	9.48	

FUNDAMENTALS (APR 30, 2025)

Div Yld (%)	P/E	P/E Fwd	P/BV
1.41	25.12	20.14	4.27
1.41	25.29	na	4.26
1.90	21.22	17.74	3.01

INDEX RISK AND RETURN CHARACTERISTICS (APR 30, 2025)

	Turnover (%) ¹	ANNUALIZED STD DEV (%) ²			SHARPE RATIO ^{2,3}				MAXIMUM DRAWDOWN	
		3 Yr	5 Yr	10 Yr	3 Yr	5 Yr	10 Yr	Since May 31, 1994	(%)	Period YYYY-MM-DD
MSCI US Investable Market 2500	1.91	16.91	16.62	15.93	0.47	0.78	0.66	0.62	55.29	2007-10-09–2009-03-09
MSCI US Broad Market	1.86	16.91	16.62	15.93	0.47	0.78	0.66	0.62	55.39	2007-10-09–2009-03-09
MSCI World IMI	2.05	16.10	15.91	15.28	0.46	0.75	0.55	0.42	57.69	2007-10-31–2009-03-09

¹ Last 12 months

² Based on monthly gross returns data

³ Based on NY FED Overnight SOFR from Sep 1 2021 & on ICE LIBOR 1M prior that date

MSCI US Investable Market 2500 Index (USD)

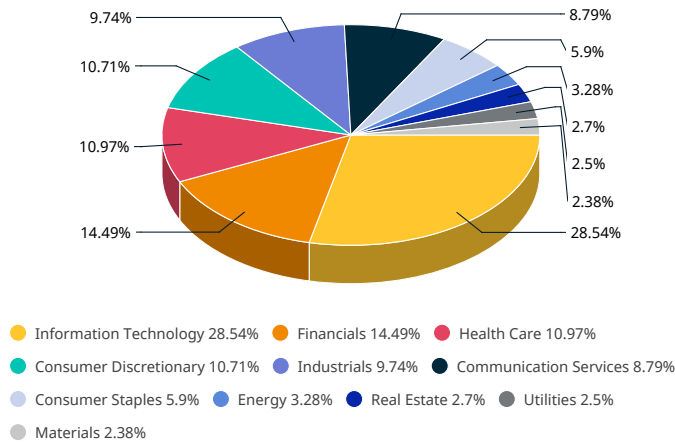
INDEX CHARACTERISTICS

MSCI US Investable Market 2500	
Number of Constituents	2,451
Mkt Cap (USD Millions)	
Index	53,402,234.57
Largest	3,195,548.23
Smallest	8.50
Average	21,787.94
Median	2,462.95

TOP 10 CONSTITUENTS

	Float Adj Mkt Cap (USD Billions)	Index Wt. (%)	Sector
APPLE	3,195.55	5.98	Info Tech
MICROSOFT CORP	2,791.78	5.23	Info Tech
NVIDIA	2,667.45	5.00	Info Tech
AMAZON.COM	1,745.26	3.27	Cons Discr
META PLATFORMS A	1,196.90	2.24	Comm Srvcs
ALPHABET A	927.87	1.74	Comm Srvcs
BROADCOM	857.07	1.60	Info Tech
TESLA	815.18	1.53	Cons Discr
ALPHABET C	801.33	1.50	Comm Srvcs
LILLY (ELI) & COMPANY	725.38	1.36	Health Care
Total	15,723.75	29.44	

SECTOR WEIGHTS



The MSCI US Investable Market 2500 Index was launched on Nov 29, 2002. Data prior to the launch date is back-tested test (i.e. calculations of how the index might have performed over that time period had the index existed). There are frequently material differences between back-tested performance and actual results. Past performance – whether actual or back-tested – is no indication or guarantee of future performance.

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