

# 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) (MAR 2011 – MAR 2026)



## ANNUAL PERFORMANCE (%)

Year	MSCI US Investable Market 2500	MSCI US Broad Market	MSCI World IMI
2025	17.22	17.21	21.49
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

## INDEX PERFORMANCE – GROSS RETURNS (%) (MAR 31, 2026)

	1 Mo	3 Mo	1 Yr	YTD	ANNUALIZED				Since May 30, 2003
					3 Yr	5 Yr	10 Yr		
MSCI US Investable Market 2500	-4.94	-3.91	18.36	-3.91	17.93	11.02	13.81	10.95	
MSCI US Broad Market	-4.94	-3.90	18.38	-3.90	17.92	11.00	13.81	10.95	
MSCI World IMI	-6.46	-2.96	20.15	-2.96	16.93	10.21	12.09	9.92	

## FUNDAMENTALS (MAR 31, 2026)

Div Yld (%)	P/E	P/E Fwd	P/BV
1.27	26.21	19.75	4.60
1.27	26.31	na	4.59
1.72	22.92	17.99	3.38

## INDEX RISK AND RETURN CHARACTERISTICS (MAR 31, 2026)

	Turnover (%) <sup>1</sup>	ANNUALIZED STD DEV (%) <sup>2</sup>			SHARPE RATIO <sup>2,3</sup>			Since May 31, 1994	MAXIMUM DRAWDOWN	
		3 Yr	5 Yr	10 Yr	3 Yr	5 Yr	10 Yr		(%)	Period YYYY-MM-DD
MSCI US Investable Market 2500	1.56	12.63	15.61	15.55	1.00	0.54	0.76	0.65	55.29	2007-10-09–2009-03-09
MSCI US Broad Market	1.53	12.64	15.61	15.55	1.00	0.54	0.76	0.65	55.39	2007-10-09–2009-03-09
MSCI World IMI	1.70	12.00	14.84	14.86	0.98	0.51	0.69	0.44	57.69	2007-10-31–2009-03-09

<sup>1</sup> Last 12 months

<sup>2</sup> Based on monthly gross returns data

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

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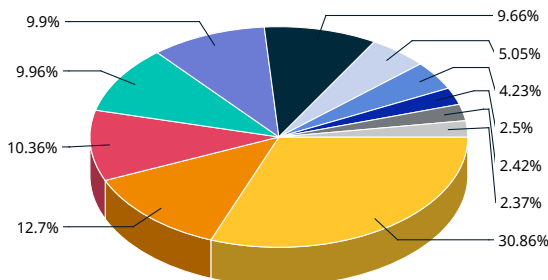
## INDEX CHARACTERISTICS

MSCI US Investable Market 2500	
<b>Number of Constituents</b>	2,454
<b>Mkt Cap (USD Millions)</b>	
<b>Index</b>	62,656,822.96
<b>Largest</b>	4,237,920.00
<b>Smallest</b>	9.88
<b>Average</b>	25,532.53
<b>Median</b>	2,898.93

## TOP 10 CONSTITUENTS

	Float Adj Mkt Cap (USD Billions)	Index Wt. (%)	Sector
NVIDIA	4,237.92	6.76	Info Tech
APPLE	3,730.19	5.95	Info Tech
MICROSOFT CORP	2,613.68	4.17	Info Tech
AMAZON.COM	2,003.81	3.20	Cons Discr
ALPHABET A	1,673.54	2.67	Comm Srvc
ALPHABET C	1,395.95	2.23	Comm Srvc
BROADCOM	1,394.10	2.22	Info Tech
META PLATFORMS A	1,246.24	1.99	Comm Srvc
TESLA	1,050.92	1.68	Cons Discr
JPMORGAN CHASE & CO	800.78	1.28	Financials
<b>Total</b>	<b>20,147.11</b>	<b>32.15</b>	

## SECTOR WEIGHTS



- Information Technology 30.86%
- Financials 12.7%
- Industrials 10.36%
- Consumer Discretionary 9.96%
- Health Care 9.9%
- Communication Services 9.66%
- Consumer Staples 5.05%
- Energy 4.23%
- Utilities 2.5%
- Materials 2.42%
- Real Estate 2.37%

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.

## ABOUT MSCI

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