

# MSCI US Broad Market Index (USD)

The **MSCI US Broad Market Index** captures broad US equity coverage. The index includes 2,919 constituents across large, mid, small and micro capitalizations, representing about 99% of the US equity universe.

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

## CUMULATIVE INDEX PERFORMANCE – NET RETURNS (USD) (APR 2010 – APR 2025)



## ANNUAL PERFORMANCE (%)

Year	MSCI US Broad Market	MSCI US Investable Market 2500
2024	23.32	23.32
2023	25.61	25.66
2022	-19.62	-19.62
2021	25.59	25.63
2020	20.39	20.38
2019	30.32	30.34
2018	-5.80	-5.79
2017	20.52	20.53
2016	11.96	11.93
2015	-0.04	0.00
2014	12.02	12.07
2013	32.83	32.72
2012	15.65	15.61
2011	0.49	0.55

## INDEX PERFORMANCE – NET RETURNS (%) (APR 30, 2025)

	1 Mo	3 Mo	1 Yr	YTD	ANNUALIZED			
					3 Yr	5 Yr	10 Yr	Since May 30, 2003
MSCI US Broad Market	-0.71	-8.44	10.83	-5.62	10.92	14.76	11.16	9.95
MSCI US Investable Market 2500	-0.71	-8.43	10.83	-5.61	10.93	14.77	11.17	9.94

## FUNDAMENTALS (APR 30, 2025)

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

## INDEX RISK AND RETURN CHARACTERISTICS (APR 30, 2025)

	Turnover (%) <sup>1</sup>	ANNUALIZED STD DEV (%) <sup>2</sup>			SHARPE RATIO <sup>2,3</sup>				MAXIMUM DRAWDOWN	
		3 Yr	5 Yr	10 Yr	3 Yr	5 Yr	10 Yr	Since May 30, 2003	(%)	Period YYYY-MM-DD
MSCI US Broad Market	1.86	16.91	16.61	15.93	0.44	0.76	0.62	0.59	55.81	2007-10-09—2009-03-09
MSCI US Investable Market 2500	1.91	16.91	16.61	15.93	0.44	0.76	0.62	0.59	55.71	2007-10-09—2009-03-09

<sup>1</sup> Last 12 months

<sup>2</sup> Based on monthly net 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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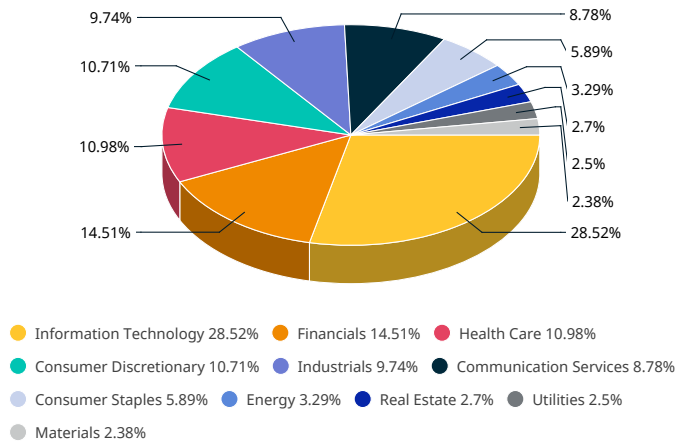
INDEX CHARACTERISTICS

MSCI US Broad Market	
Number of Constituents	2,919
Mkt Cap ( USD Millions)	
Index	53,466,414.85
Largest	3,195,548.23
Smallest	2.53
Average	18,316.69
Median	1,571.16

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	5.22	Info Tech
NVIDIA	2,667.45	4.99	Info Tech
AMAZON.COM	1,745.26	3.26	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	1.52	Cons Discr
ALPHABET C	801.33	1.50	Comm Srvcs
LILLY (ELI) & COMPANY	725.38	1.36	Health Care
Total	15,723.75	29.41	

SECTOR WEIGHTS



The MSCI US Broad Market Index was launched on May 30, 2003. 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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