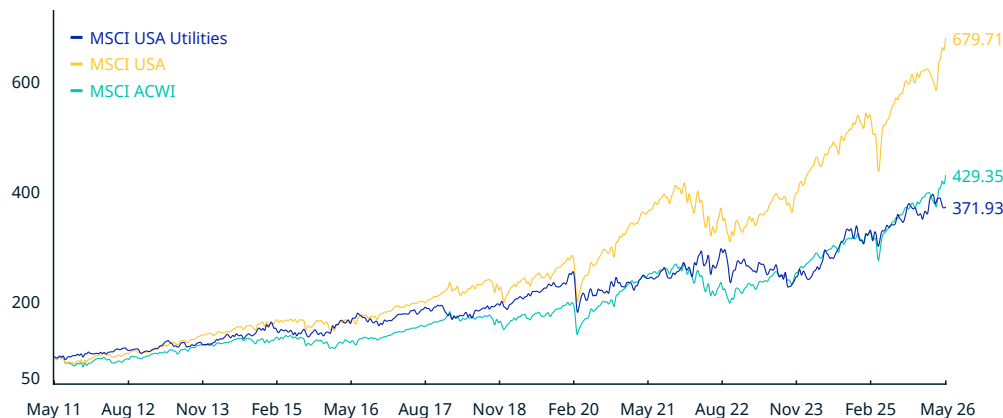


# MSCI USA Utilities Index (USD)

The **MSCI USA Utilities Index** is designed to capture the large and mid cap segments of the US equity universe. All securities in the index are classified in the Utilities sector as per the Global Industry Classification Standard (GICS®).

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

## CUMULATIVE INDEX PERFORMANCE – NET RETURNS (USD) (MAY 2011 – MAY 2026)



## ANNUAL PERFORMANCE (%)

Year	MSCI USA Utilities	MSCI USA	MSCI ACWI
2025	14.71	17.31	22.34
2024	23.59	24.58	17.49
2023	-7.77	26.49	22.20
2022	0.53	-19.85	-18.36
2021	16.34	26.45	18.54
2020	-0.80	20.73	16.25
2019	24.29	30.88	26.60
2018	3.35	-5.04	-9.41
2017	9.98	21.19	23.97
2016	15.08	10.89	7.86
2015	-6.88	0.69	-2.36
2014	26.62	12.69	4.16
2013	12.31	31.79	22.80
2012	0.43	15.33	16.13

## INDEX PERFORMANCE – NET RETURNS (%) (MAY 29, 2026)

	1 Mo	3 Mo	1 Yr	YTD	ANNUALIZED				Since Dec 29, 2000
					3 Yr	5 Yr	10 Yr		
MSCI USA Utilities	-5.29	-6.36	9.96	4.30	13.94	8.97	8.48	5.32	
MSCI USA	5.23	10.52	28.86	10.90	23.22	13.25	15.06	8.54	
MSCI ACWI	5.16	7.54	30.27	12.15	22.30	11.45	12.81	7.48	

## FUNDAMENTALS (MAY 29, 2026)

Div Yld (%)	P/E	P/E Fwd	P/BV
2.84	21.27	18.10	2.30
1.11	28.27	21.72	5.86
1.58	23.77	18.23	3.85

## INDEX RISK AND RETURN CHARACTERISTICS (MAY 29, 2026)

	Turnover (%) <sup>1</sup>	ANNUALIZED STD DEV (%) <sup>2</sup>			SHARPE RATIO <sup>2,3</sup>			Since Dec 29, 2000	MAXIMUM DRAWDOWN	
		3 Yr	5 Yr	10 Yr	3 Yr	5 Yr	10 Yr		(%)	Period YYYY-MM-DD
MSCI USA Utilities	2.10	15.09	16.61	15.43	0.63	0.39	0.45	0.38	61.17	2000-09-29–2002-10-09
MSCI USA	2.23	13.49	16.04	15.59	1.28	0.65	0.83	0.57	55.36	2007-10-09–2009-03-09
MSCI ACWI	2.47	12.81	15.04	14.74	1.28	0.57	0.74	0.41	58.38	2007-10-31–2009-03-09

<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

# MSCI USA Utilities Index (USD)

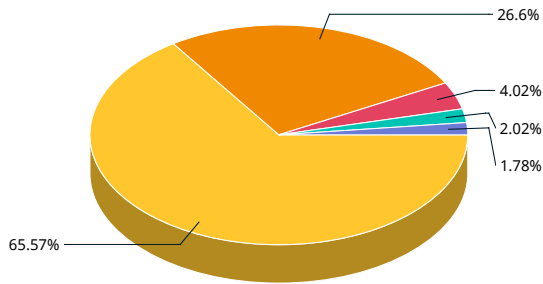
## INDEX CHARACTERISTICS

MSCI USA Utilities	
<b>Number of Constituents</b>	30
<b>Index</b>	1,351,081.52
<b>Largest</b>	179,179.05
<b>Smallest</b>	7,404.08
<b>Average</b>	45,036.05
<b>Median</b>	32,792.76

## TOP 10 CONSTITUENTS

	Float Adj Mkt Cap (USD Billions)	Index Wt. (%)
NEXTERA ENERGY	179.18	13.26
SOUTHERN COMPANY (THE)	101.36	7.50
DUKE ENERGY CORP	95.44	7.06
CONSTELLATION ENERGY	88.63	6.56
AMERICAN ELECTRIC POWER	67.65	5.01
SEMPRA ENERGY	58.17	4.31
DOMINION ENERGY	57.16	4.23
VISTRA ENERGY	54.29	4.02
ENTERGY CORP	48.70	3.60
XCEL ENERGY	47.03	3.48
<b>Total</b>	<b>797.61</b>	<b>59.04</b>

## SUB-INDUSTRY WEIGHTS



- Electric Utilities 65.57%
- Multi-Utilities 26.6%
- Independent Power Producers & Energy Traders 4.02%
- Gas Utilities 2.02%
- Water Utilities 1.78%

The MSCI USA Utilities Index was launched on Sep 15, 1999. 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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