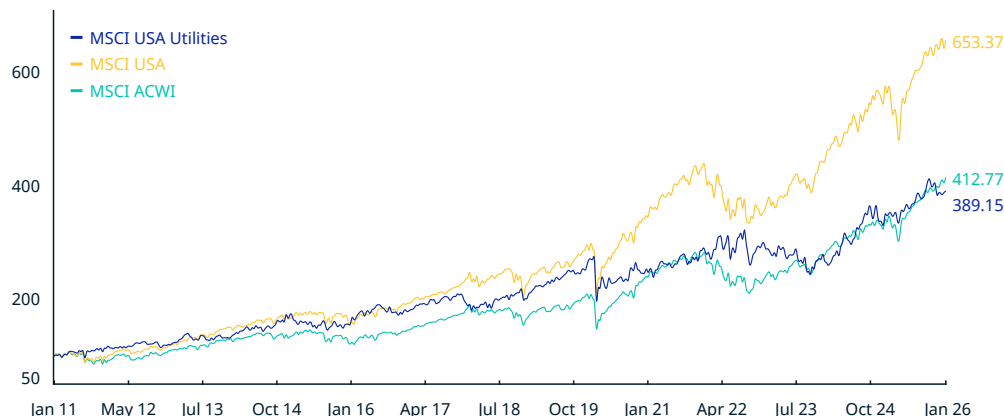


# MSCI USA Utilities Index (USD)

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) (JAN 2011 – JAN 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 (%) (JAN 30, 2026)

	1 Mo	3 Mo	1 Yr	YTD	ANNUALIZED			
					3 Yr	5 Yr	10 Yr	Since Dec 29, 2000
MSCI USA Utilities	1.34	-2.54	12.92	1.34	10.55	9.39	9.06	5.27
MSCI USA	1.27	1.24	15.32	1.27	20.67	13.89	14.99	8.26
MSCI ACWI	2.96	4.03	21.87	2.96	19.06	11.95	12.75	7.21

## FUNDAMENTALS (JAN 30, 2026)

Div Yld (%)	P/E	P/E Fwd	P/BV
2.82	21.38	18.33	2.39
1.16	27.97	22.26	5.57
1.64	23.38	18.98	3.65

## INDEX RISK AND RETURN CHARACTERISTICS (JAN 30, 2026)

	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 Dec 29, 2000	(%)	Period YYYY-MM-DD
MSCI USA Utilities	2.02	14.83	16.75	15.19	0.43	0.43	0.50	0.38	61.17	2000-09-29–2002-10-09
MSCI USA	2.16	11.90	15.27	15.23	1.25	0.72	0.85	0.56	55.36	2007-10-09–2009-03-09
MSCI ACWI	2.56	10.88	13.97	14.31	1.23	0.65	0.76	0.40	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)

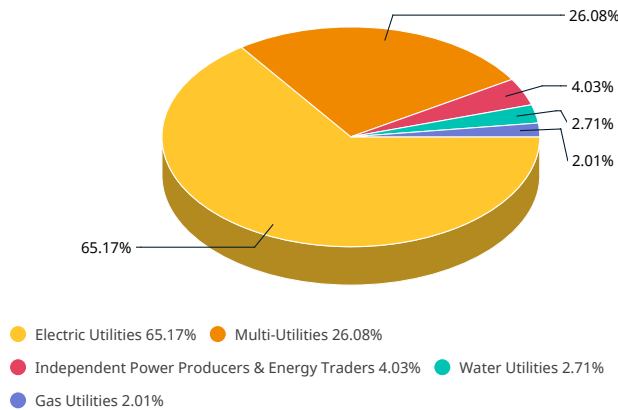
INDEX CHARACTERISTICS

MSCI USA Utilities	
Number of Constituents	31
Mkt Cap ( USD Millions)	
Index	1,331,296.59
Largest	181,011.82
Smallest	8,814.48
Average	42,945.05
Median	29,523.34

TOP 10 CONSTITUENTS

	Float Adj Mkt Cap ( USD Billions)	Index Wt. (%)
NEXTERA ENERGY	181.01	13.60
SOUTHERN COMPANY (THE)	98.25	7.38
DUKE ENERGY CORP	94.36	7.09
CONSTELLATION ENERGY	87.69	6.59
AMERICAN ELECTRIC POWER	64.06	4.81
SEMPRA ENERGY	56.77	4.26
VISTRA ENERGY	53.65	4.03
DOMINION ENERGY	51.33	3.86
EXELON CORP	45.23	3.40
XCEL ENERGY	44.98	3.38
Total	777.32	58.39

SUB-INDUSTRY WEIGHTS



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.

## ABOUT MSCI

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