

MSCI USA Mid Cap Equal Weighted Index (USD)

The **MSCI USA Mid Cap Equal Weighted Index** represents an alternative weighting scheme to its market cap weighted parent index, the MSCI USA Index. The index includes the same constituents as its parent index and captures mid cap securities across the U.S. equity markets. However, at each semi-annual rebalance date, all index constituents are weighted equally, effectively removing the influence of each constituents current price (high or low). Between rebalances, index constituent weightings will fluctuate due to price performance.

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 Mid Cap Equal Weighted	MSCI USA
2025	7.69	17.31
2024	13.14	24.58
2023	15.91	26.49
2022	-18.30	-19.85
2021	25.65	26.45
2020	17.57	20.73
2019	28.59	30.88
2018	-10.21	-5.04
2017	17.82	21.19
2016	12.97	10.89
2015	-2.84	0.69
2014	11.37	12.69
2013	35.93	31.79
2012	16.74	15.33

INDEX PERFORMANCE – NET RETURNS (%) (JAN 30, 2026)

FUNDAMENTALS (JAN 30, 2026)

	1 Mo	3 Mo	1 Yr	YTD	ANNUALIZED				Div Yld (%)	P/E	P/E Fwd	P/BV
					3 Yr	5 Yr	10 Yr	Since May 31, 1994				
MSCI USA Mid Cap Equal Weighted	1.57	2.76	5.15	1.57	9.37	8.16	11.11	9.76	1.72	23.79	18.00	3.03
MSCI USA	1.27	1.24	15.32	1.27	20.67	13.89	14.99	10.45	1.16	27.97	22.26	5.57

INDEX RISK AND RETURN CHARACTERISTICS (MAY 31, 1994 – JAN 30, 2026)

	Beta	Tracking Error (%) ¹	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 USA Mid Cap Equal Weighted	1.08	7.22	34.31	15.34	17.36	18.05	0.35	0.35	0.55	0.46	59.97	2007-07-13–2009-03-09
MSCI USA	1.00	0.00	2.16	11.90	15.27	15.23	1.25	0.72	0.85	0.56	55.36	2007-10-09–2009-03-09

¹ Last 12 months

² Based on monthly net returns data

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

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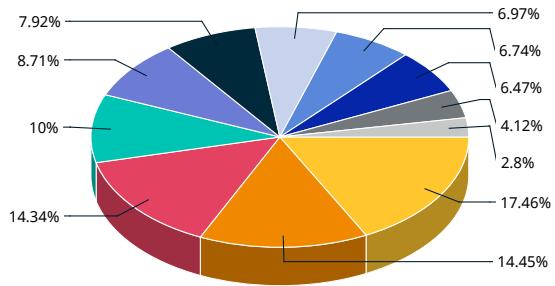
INDEX CHARACTERISTICS

	MSCI USA Mid Cap Equal Weighted	MSCI USA
Number of Constituents	311	544
	Weight (%)	
Largest	0.52	7.70
Smallest	0.14	0.01
Average	0.32	0.18
Median	0.32	0.06

TOP 10 CONSTITUENTS

	Index Wt. (%)	Parent Index Wt. (%)	Sector
ECHOSTAR HOLDING A	0.52	0.03	Comm Svcs
ROCKET LAB CORP	0.51	0.06	Industrials
WESTERN DIGITAL	0.48	0.14	Info Tech
SEAGATE TECHNOLOGY	0.46	0.14	Info Tech
DECKERS OUTDOOR CORP	0.45	0.03	Cons Discr
ENTEGRIS	0.45	0.03	Info Tech
DOLLAR GENERAL CORP	0.44	0.05	Cons Staples
MICROCHIP TECHNOLOGY	0.43	0.07	Info Tech
TERADYNE	0.43	0.06	Info Tech
CH ROBINSON WORLDWIDE	0.41	0.04	Industrials
Total	4.57	0.65	

SECTOR WEIGHTS



- Industrials 17.46% ● Financials 14.45% ● Information Technology 14.34%
- Health Care 10% ● Consumer Discretionary 8.71% ● Real Estate 7.92%
- Consumer Staples 6.97% ● Materials 6.74% ● Utilities 6.47%
- Communication Services 4.12% ● Energy 2.8%

ABOUT MSCI

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