

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) (MAY 2011 – MAY 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 (%) (MAY 29, 2026)

	1 Mo	3 Mo	1 Yr	YTD	ANNUALIZED				Since May 31, 1994
					3 Yr	5 Yr	10 Yr	Since May 31, 1994	
MSCI USA Mid Cap Equal Weighted	3.39	3.96	17.40	8.03	15.46	6.19	10.42	9.86	
MSCI USA	5.23	10.52	28.86	10.90	23.22	13.25	15.06	10.65	

FUNDAMENTALS (MAY 29, 2026)

Div Yld (%)	P/E	P/E Fwd	P/BV
1.58	24.68	18.24	3.26
1.11	28.27	21.72	5.86

INDEX RISK AND RETURN CHARACTERISTICS (MAY 31, 1994 – MAY 29, 2026)

	Beta	Tracking Error (%)	Turnover (%) ¹	ANNUALIZED STD DEV (%) ²			SHARPE RATIO ^{2,3}			Since May 31, 1994	MAXIMUM DRAWDOWN	
				3 Yr	5 Yr	10 Yr	3 Yr	5 Yr	10 Yr		(%)	Period YYYY-MM-DD
MSCI USA Mid Cap Equal Weighted	1.07	7.24	33.42	15.88	17.64	18.17	0.69	0.23	0.51	0.47	59.97	2007-07-13–2009-03-09
MSCI USA	1.00	0.00	2.23	13.49	16.04	15.59	1.28	0.65	0.83	0.57	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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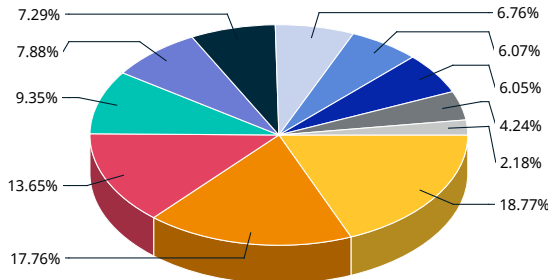
INDEX CHARACTERISTICS

	MSCI USA Mid Cap Equal Weighted	MSCI USA
Number of Constituents	304	536
Weight (%)		
Largest	0.95	7.79
Smallest	0.12	0.01
Average	0.33	0.19
Median	0.31	0.06

TOP 10 CONSTITUENTS

	Index Wt. (%)	Parent Index Wt. (%)	Sector
SEAGATE TECHNOLOGY	0.95	0.29	Info Tech
ROCKET LAB CORP	0.88	0.10	Industrials
CIENA CORP	0.85	0.12	Info Tech
ON SEMICONDUCTOR CORP	0.75	0.07	Info Tech
FLEX	0.73	0.08	Info Tech
BLOOM ENERGY CORP A	0.69	0.10	Industrials
ASTERA LABS	0.67	0.07	Info Tech
TERADYNE	0.64	0.09	Info Tech
COMFORT SYSTEMS USA	0.58	0.10	Industrials
ECHOSTAR HOLDING A	0.57	0.03	Comm Srvcs
Total	7.30	1.06	

SECTOR WEIGHTS



- Information Technology 18.77%
- Industrials 17.76%
- Financials 13.65%
- Health Care 9.35%
- Consumer Discretionary 7.88%
- Materials 7.29%
- Real Estate 6.76%
- Consumer Staples 6.07%
- Utilities 6.05%
- Communication Services 4.24%
- Energy 2.18%

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