

# MSCI USA Energy Index (USD)

The **MSCI USA Energy 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 Energy 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) (MAR 2011 – MAR 2026)



## ANNUAL PERFORMANCE (%)

Year	MSCI USA Energy	MSCI USA	MSCI ACWI
2025	6.92	17.31	22.34
2024	5.98	24.58	17.49
2023	-2.39	26.49	22.20
2022	62.78	-19.85	-18.36
2021	51.00	26.45	18.54
2020	-35.11	20.73	16.25
2019	10.39	30.88	26.60
2018	-18.58	-5.04	-9.41
2017	-1.55	21.19	23.97
2016	24.83	10.89	7.86
2015	-22.41	0.69	-2.36
2014	-8.07	12.69	4.16
2013	24.64	31.79	22.80
2012	3.26	15.33	16.13

## INDEX PERFORMANCE – NET RETURNS (%) (MAR 31, 2026)

	1 Mo	3 Mo	1 Yr	YTD	ANNUALIZED				Since Dec 29, 2000
					3 Yr	5 Yr	10 Yr		
MSCI USA Energy	10.46	37.97	34.25	37.97	17.19	23.62	10.03	7.48	
MSCI USA	-4.93	-4.61	17.31	-4.61	17.90	11.15	13.59	7.95	
MSCI ACWI	-7.18	-3.20	20.01	-3.20	16.58	9.49	11.33	6.90	

## FUNDAMENTALS (MAR 31, 2026)

Div Yld (%)	P/E	P/E Fwd	P/BV
2.53	24.50	21.13	2.71
1.24	25.67	19.96	5.14
1.75	21.77	17.12	3.43

## INDEX RISK AND RETURN CHARACTERISTICS (MAR 31, 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 Energy	1.77	19.51	25.20	29.39	0.67	0.83	0.39	0.40	72.74	2014-06-23–2020-03-18
MSCI USA	2.23	12.30	15.48	15.26	1.02	0.55	0.76	0.55	55.36	2007-10-09–2009-03-09
MSCI ACWI	2.47	11.69	14.41	14.39	0.97	0.47	0.66	0.38	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

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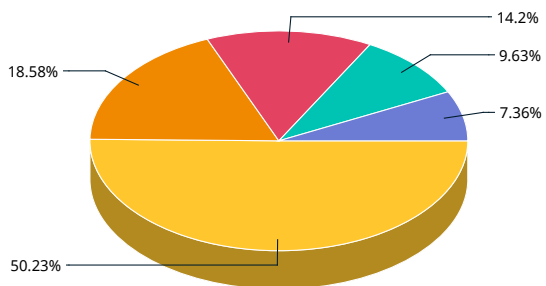
## INDEX CHARACTERISTICS

MSCI USA Energy	
<b>Number of Constituents</b>	22
<b>Mkt Cap (USD Millions)</b>	
<b>Index</b>	2,307,875.34
<b>Largest</b>	715,484.32
<b>Smallest</b>	26,146.27
<b>Average</b>	104,903.42
<b>Median</b>	60,658.78

## TOP 10 CONSTITUENTS

	Float Adj Mkt Cap (USD Billions)	Index Wt. (%)
EXXON MOBIL CORP	715.48	31.00
CHEVRON CORP	395.77	17.15
CONOCOPHILLIPS	163.11	7.07
WILLIAMS COS	88.88	3.85
EOG RESOURCES	78.44	3.40
SLB	76.77	3.33
VALERO ENERGY CORP	75.36	3.27
PHILLIPS 66	73.40	3.18
MARATHON PETROLEUM	73.40	3.18
KINDER MORGAN P	67.14	2.91
<b>Total</b>	<b>1,807.77</b>	<b>78.33</b>

## SUB-INDUSTRY WEIGHTS



- Integrated Oil & Gas 50.23%
- Oil & Gas Exploration & Production 18.58%
- Oil & Gas Storage & Transportation 14.2%
- Oil & Gas Refining & Marketing 9.63%
- Oil & Gas Equipment & Services 7.36%

The MSCI USA Energy 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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