

## Equity Index Returns (1928-2022)

### Summary Results for 95 1-year Periods (1928-2022)

	US LCB (S&P 500)	US LCV	US SCB	US SCV	US 4-Fund (SCV, LCV, SCB, LCB)	US All Value (SCV, LCV)	US 2-Fund (S&P 500, SCV)
In 95 yrs \$100 grows to:	\$751,234	\$1,996,611	\$4,111,737	\$12,764,806	\$3,617,830	\$5,831,807	\$3,976,839
CRR over 95 years	9.8%	11.0%	11.8%	13.2%	11.7%	12.2%	11.8%
Best 1 year return	54.0%	92.5%	111.2%	124.7%	96.1%	110.4%	89.9%
Worst 1 year return	-43.3%	-61.1%	-48.3%	-55.4%	-51.8%	-58.1%	-49.4%
SD over 95 years	19.8%	22.8%	28.3%	31.2%	24.5%	26.5%	24.3%

### Summary Results for 80 15-year Periods (1928-2021)

	US LCB (S&P 500)	US LCV	US SCB	US SCV	US 4-Fund (SCV, LCV, SCB, LCB)	US All Value (SCV, LCV)	US 2-Fund (S&P 500, SCV)
Avg 15 yr growth of \$100	\$460	\$606	\$666	\$882	\$652	\$745	\$657
Average 15 year CRR	10.7%	12.8%	13.5%	15.6%	13.3%	14.3%	13.4%
Best 15 year CRR	18.9%	21.7%	23.2%	26.5%	22.1%	24.2%	21.7%
Worst 15 year CRR	0.6%	-0.6%	1.6%	-1.9%	0.6%	-0.9%	0.5%
Average 15 year SD	18.1%	20.3%	26.1%	28.8%	22.3%	23.9%	22.1%
Lowest 15 year SD	12.4%	12.9%	16.6%	18.9%	14.9%	15.8%	14.5%
Highest 15 year SD	30.7%	38.6%	45.8%	52.0%	40.7%	44.8%	40.1%

### Summary Results for 55 40-year Periods (1928-2021)

	US LCB (S&P 500)	US LCV	US SCB	US SCV	US 4-Fund (SCV, LCV, SCB, LCB)	US All Value (SCV, LCV)	US 2-Fund (S&P 500, SCV)
Avg 40 yr growth of \$100	\$6,499	\$15,481	\$17,142	\$40,059	\$17,348	\$26,204	\$17,469
Average 40 year CRR	11.0%	13.4%	13.7%	16.2%	13.8%	14.9%	13.8%
Best 40 year CRR	12.5%	15.6%	16.7%	19.0%	15.9%	17.2%	15.8%
Worst 40 year CRR	8.9%	8.8%	10.6%	11.6%	10.8%	10.7%	10.8%
Average 40 year SD	17.7%	19.3%	26.0%	27.9%	21.6%	23.0%	21.3%
Lowest 40 year SD	15.6%	16.3%	19.6%	21.6%	17.4%	18.8%	17.0%
Highest 40 year SD	23.2%	28.3%	34.8%	39.4%	30.4%	33.3%	30.3%

Notes: 1) Source data from Dimensional Fund Advisors, 2) Results exclude advisor fees and fund expenses.

Abbreviations: LCB - US Large Cap Blend, LCV - US Large Cap Value, SCB - US Small Cap Blend, SCV - US Small Cap Value, CRR - Compound Rate of Return, SD - Standard Deviation.

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