

Summary of 1 Yr Period Results (1928-2017)

	US LCB (S&P 500)	US LCV	US SCB	US SCV	S&P 500	4-Fund Combo (SCV, LCV, SCB, LCB)	2- Fund Combo >All Value< (SCV, LCV)
In 90 yrs \$100 grows to:	\$478,851	\$1,501,193	\$3,071,671	\$8,619,197	\$478,851	\$2,508,644	\$4,138,944
90 year avg CRR	9.9%	11.3%	12.2%	13.5%	9.9%	11.9%	12.5%
Best 1 year return	54.0%	92.5%	111.0%	125.2%	54.0%	96.2%	110.6%
Worst 1 year return	-43.3%	-61.1%	-48.3%	-55.5%	-43.3%	-51.8%	-58.2%
SD over 90 yr period	19.8%	23.0%	28.6%	31.8%	19.8%	24.8%	26.8%

Notes: 1) Source data from Dimensional Fund Advisors, 2) Excludes Advisor fees and fund expenses.

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

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Summary of 15 Yr Period Results (1928-2017)

	US LCB (S&P 500)	US LCV	US SCB	US SCV	S&P 500	4-Fund Combo (SCV, LCV, SCB, LCB)	2- Fund Combo All Value (SCV, LCV)
In 15 yrs \$100, on average, grows to:	\$465	\$631	\$689	\$924	\$465	\$674	\$778
Avg 15 year CRR	10.8%	13.1%	13.7%	16.0%	10.8%	13.6%	14.7%
Best 15 year CRR	18.9%	21.7%	23.1%	26.3%	18.9%	22.1%	24.2%
Worst 15 year CRR	0.6%	-0.6%	1.6%	-1.9%	0.6%	0.6%	-0.9%
Avg SD over all 15 yr periods	18.2%	20.1%	26.3%	29.1%	18.2%	22.4%	24.0%
Lowest 15 year SD	12.4%	12.9%	16.2%	18.9%	12.4%	14.9%	15.7%
Highest SD 15 year period	30.7%	38.6%	45.8%	52.1%	30.7%	40.8%	44.8%

Notes: 1) Source data from Dimensional Fund Advisors, 2) Excludes Advisor fees and fund expenses.

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

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Summary of 40 Yr Period Results (1928-2017)

	US LCB (S&P 500)	US LCV	US SCB	US SCV	S&P 500	4-Fund Combo (SCV, LCV, SCB, LCB)	2- Fund Combo All Value (SCV, LCV)
In 40 yrs \$100, on average, grows to:	\$6,354	\$15,661	\$17,474	\$40,752	\$6,354	\$17,464	\$26,608
Avg 40 year CRR	10.9%	13.5%	13.8%	16.2%	10.9%	13.8%	15.0%
Best 40 year CRR	12.5%	15.6%	16.7%	19.0%	12.5%	15.9%	17.2%
Worst 40 year CRR	8.9%	8.8%	10.7%	11.6%	8.9%	10.8%	10.7%
Avg SD over all 40 yr periods	17.8%	19.4%	26.5%	28.4%	17.8%	21.9%	23.2%
Lowest 40 year SD	15.6%	16.3%	19.6%	21.9%	15.6%	17.4%	18.8%
Highest SD 40 year period	23.2%	28.3%	34.8%	39.4%	23.2%	30.4%	33.3%

Notes: 1) Source data from Dimensional Fund Advisors, 2) Excludes Advisor fees and fund expenses.

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

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