

Equity Returns (1928-2019)

Summary Results for 92 1-year Periods (1928-2019)

	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 92 yrs \$100 grows to:	\$602,019	\$1,652,371	\$3,302,600	\$8,843,907	\$602,019	\$2,793,954	\$4,403,679
CRR over 92 years	9.9%	11.1%	12.0%	13.2%	9.9%	11.8%	12.3%
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 92 years	19.8%	23.0%	28.5%	31.6%	19.8%	24.7%	26.7%

Summary Results for 77 15-year Periods (1928-2019)

	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)
Avg 15 yr growth of \$100	\$461	\$618	\$678	\$901	\$461	\$662	\$761
Average 15 year CRR	10.7%	12.9%	13.6%	15.8%	10.7%	13.4%	14.5%
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%
Average 15 year SD	18.2%	20.2%	26.2%	29.0%	18.2%	22.3%	24.0%
Lowest 15 year SD	12.4%	12.9%	16.2%	18.9%	12.4%	14.9%	15.7%
Highest 15 year SD	30.7%	38.6%	45.8%	52.1%	30.7%	40.8%	44.8%

Summary Results for 52 40-year Periods (1928-2019)

	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)
Avg 40 yr growth of \$100	\$6,418	\$15,599	\$17,405	\$40,240	\$6,418	\$17,410	\$26,374
Average 40 year CRR	11.0%	13.5%	13.8%	16.2%	11.0%	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%
Average 40 year SD	17.7%	19.4%	26.2%	28.2%	17.7%	21.7%	23.1%
Lowest 40 year SD	15.6%	16.3%	19.6%	21.9%	15.6%	17.4%	18.8%
Highest 40 year SD	23.2%	28.3%	34.8%	39.4%	23.2%	30.4%	33.3%

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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