

Equity Returns (1928-2021)

Summary Results for 94 1-year Periods (1928-2021)

	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 94 yrs \$100 grows to:	\$917,379	\$2,185,429	\$4,565,555	\$13,233,052	\$917,379	\$4,024,753	\$6,208,587
CRR over 94 years	10.2%	11.2%	12.1%	13.4%	10.2%	11.9%	12.5%
Best 1 year return	54.0%	92.5%	110.8%	124.7%	54.0%	96.0%	110.3%
Worst 1 year return	-43.3%	-61.1%	-48.3%	-55.4%	-43.3%	-51.8%	-58.2%
SD over 94 years	19.7%	22.8%	28.2%	31.3%	19.7%	24.5%	26.5%

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

	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	\$460	\$607	\$661	\$882	\$460	\$652	\$746
Average 15 year CRR	10.7%	12.8%	13.4%	15.6%	10.7%	13.3%	14.3%
Best 15 year CRR	18.9%	21.7%	23.1%	26.4%	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	18.1%	20.2%	26.1%	28.7%	18.1%	22.3%	23.9%
Lowest 15 year SD	12.4%	12.9%	16.5%	18.7%	12.4%	14.9%	15.8%
Highest 15 year SD	30.7%	38.6%	45.7%	52.0%	30.7%	40.7%	44.8%

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

	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	\$6,499	\$15,596	\$16,875	\$39,930	\$6,499	\$17,300	\$26,258
Average 40 year CRR	11.0%	13.5%	13.7%	16.2%	11.0%	13.7%	14.9%
Best 40 year CRR	12.5%	15.6%	16.6%	19.0%	12.5%	15.9%	17.2%
Worst 40 year CRR	8.9%	8.8%	10.5%	11.6%	8.9%	10.8%	10.7%
Average 40 year SD	17.7%	19.3%	26.0%	27.9%	17.7%	21.5%	22.9%
Lowest 40 year SD	15.6%	16.3%	19.6%	21.5%	15.6%	17.4%	18.7%
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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