

Table B14B - Fine Tuning Table - S&amp;P 500 vs US SCV Equity Portfolio

Index returns reduced by a representative fund's expense ratio, except S&amp;P 500 Index shown below.

	100%											100%		Out Performance	
Year	S&P	10/90	20/80	30/70	40/60	50/50	60/40	70/30	80/20	90/10	SCV	S&P	US SCV		
1970	4.0%	3.5%	3.0%	2.5%	2.0%	1.5%	0.9%	0.3%	-0.2%	-0.8%	-1.5%	5.4%	0.6%		
1971	14.3%	14.4%	14.6%	14.7%	14.8%	14.8%	14.9%	14.9%	14.9%	14.9%	14.9%				
1972	18.9%	17.8%	16.7%	15.6%	14.5%	13.4%	12.2%	11.1%	9.9%	8.7%	7.6%				
1973	-14.7%	-16.3%	-17.9%	-19.5%	-21.1%	-22.7%	-24.3%	-25.8%	-27.4%	-28.9%	-30.4%				
1974	-26.5%	-25.5%	-24.6%	-23.6%	-22.8%	-21.9%	-21.1%	-20.3%	-19.5%	-18.7%	-18.0%				
1975	37.2%	40.0%	42.8%	45.7%	48.5%	51.3%	54.1%	56.9%	59.7%	62.5%	65.2%				
1976	23.8%	27.0%	30.3%	33.6%	37.0%	40.4%	43.9%	47.4%	51.0%	54.6%	58.2%				
1977	-7.2%	-4.6%	-1.9%	0.9%	3.7%	6.6%	9.6%	12.6%	15.8%	18.9%	22.2%				
1978	6.5%	8.2%	9.8%	11.5%	13.1%	14.8%	16.4%	18.0%	19.6%	21.2%	22.8%				
1979	18.4%	20.0%	21.6%	23.3%	24.9%	26.6%	28.2%	29.9%	31.6%	33.3%	35.0%				
1980	32.4%	31.6%	30.8%	30.0%	29.2%	28.3%	27.5%	26.6%	25.7%	24.9%	24.0%	8.4%	25.1%		
1981	-4.9%	-2.6%	-0.3%	2.1%	4.6%	7.1%	9.6%	12.2%	14.8%	17.5%	20.2%				
1982	21.4%	22.9%	24.4%	25.9%	27.5%	29.0%	30.6%	32.1%	33.7%	35.3%	36.8%				
1983	22.5%	25.0%	27.5%	30.1%	32.7%	35.4%	38.0%	40.8%	43.5%	46.3%	49.1%				
1984	6.2%	5.8%	5.4%	4.9%	4.5%	4.1%	3.7%	3.2%	2.8%	2.4%	1.9%				
1985	32.1%	31.9%	31.6%	31.3%	31.0%	30.7%	30.4%	30.1%	29.8%	29.5%	29.2%				
1986	18.4%	17.4%	16.4%	15.4%	14.4%	13.4%	12.4%	11.4%	10.4%	9.4%	8.4%				
1987	5.2%	4.1%	3.0%	1.9%	0.8%	-0.4%	-1.5%	-2.6%	-3.7%	-4.8%	-6.0%				
1988	16.8%	18.4%	20.1%	21.8%	23.5%	25.2%	26.9%	28.6%	30.3%	32.0%	33.8%				
1989	31.5%	29.6%	27.7%	25.8%	24.0%	22.2%	20.3%	18.5%	16.8%	15.0%	13.2%				
1990	-3.1%	-5.4%	-7.6%	-9.8%	-12.0%	-14.1%	-16.1%	-18.2%	-20.2%	-22.1%	-24.0%	20.9%	16.3%		
1991	30.4%	32.0%	33.6%	35.3%	36.9%	38.5%	40.1%	41.8%	43.4%	45.1%	46.7%				
1992	7.6%	10.1%	12.7%	15.3%	17.9%	20.6%	23.3%	26.1%	28.9%	31.7%	34.5%				
1993	10.0%	11.6%	13.3%	14.9%	16.5%	18.2%	19.9%	21.6%	23.3%	25.0%	26.8%				
1994	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.3%	1.2%				
1995	37.5%	36.7%	35.9%	35.1%	34.3%	33.4%	32.6%	31.8%	30.9%	30.1%	29.3%				
1996	22.9%	22.9%	22.9%	22.8%	22.8%	22.7%	22.7%	22.6%	22.5%	22.4%	22.3%				
1997	33.3%	33.2%	33.0%	32.8%	32.6%	32.3%	32.1%	31.8%	31.5%	31.1%	30.7%				
1998	28.5%	24.5%	20.5%	16.7%	13.0%	9.4%	5.8%	2.4%	-0.9%	-4.2%	-7.3%				
1999	21.0%	20.3%	19.6%	18.9%	18.1%	17.4%	16.5%	15.7%	14.8%	14.0%	13.0%				
2000	-9.1%	-7.3%	-5.5%	-3.7%	-1.9%	-0.1%	1.7%	3.6%	5.4%	7.2%	9.0%	16.2%	18.1%		
2001	-11.9%	-8.8%	-5.7%	-2.4%	0.9%	4.3%	7.8%	11.4%	15.1%	18.8%	22.7%				
2002	-22.1%	-20.8%	-19.5%	-18.2%	-16.9%	-15.6%	-14.3%	-13.0%	-11.8%	-10.5%	-9.3%				
2003	28.7%	31.5%	34.4%	37.4%	40.4%	43.4%	46.5%	49.7%	52.9%	56.1%	59.4%				
2004	10.8%	12.3%	13.7%	15.1%	16.6%	18.0%	19.5%	21.0%	22.4%	23.9%	25.4%				
2005	4.9%	5.2%	5.5%	5.8%	6.1%	6.4%	6.7%	7.0%	7.3%	7.5%	7.8%				
2006	15.8%	16.4%	17.0%	17.6%	18.2%	18.7%	19.3%	19.9%	20.5%	21.0%	21.5%				
2007	5.5%	3.8%	2.1%	0.4%	-1.3%	-2.9%	-4.5%	-6.1%	-7.7%	-9.2%	-10.7%				
2008	-37.0%	-37.0%	-36.9%	-36.8%	-36.8%	-36.8%	-36.8%	-36.8%	-36.8%	-36.8%	-36.8%				
2009	26.4%	27.3%	28.1%	28.9%	29.6%	30.4%	31.1%	31.8%	32.4%	33.0%	33.6%				
2010	15.0%	16.6%	18.2%	19.8%	21.3%	22.9%	24.5%	26.1%	27.7%	29.3%	30.9%	9.6%	15.9%		
2011	2.1%	1.1%	0.2%	-0.8%	-1.8%	-2.7%	-3.7%	-4.6%	-5.6%	-6.6%	-7.5%				
2012	16.0%	16.5%	17.1%	17.7%	18.3%	18.9%	19.4%	20.0%	20.6%	21.2%	21.7%				
2013	32.3%	33.3%	34.3%	35.3%	36.3%	37.3%	38.3%	39.3%	40.4%	41.4%	42.4%				
2014	13.7%	12.6%	11.6%	10.6%	9.6%	8.6%	7.6%	6.5%	5.5%	4.5%	3.5%				
2015	1.4%	0.4%	-0.5%	-1.4%	-2.3%	-3.2%	-4.1%	-5.0%	-6.0%	-6.9%	-7.8%				
2016	11.9%	13.5%	15.1%	16.8%	18.4%	20.0%	21.6%	23.3%	24.9%	26.6%	28.3%				
2017	21.8%	20.3%	18.8%	17.3%	15.9%	14.4%	13.0%	11.5%	10.1%	8.6%	7.2%				
2018	-4.4%	-5.5%	-6.6%	-7.7%	-8.8%	-9.8%	-10.9%	-12.0%	-13.0%	-14.1%	-15.1%				
2019	31.4%	30.1%	28.8%	27.5%	26.2%	24.8%	23.5%	22.2%	20.8%	19.5%	18.1%				
2020	18.4%	16.9%	15.4%	13.9%	12.3%	10.7%	9.1%	7.4%	5.7%	4.0%	2.2%	16.2%	11.1%		
2021	28.7%	29.9%	31.1%	32.3%	33.4%	34.5%	35.6%	36.7%	37.8%	38.8%	39.8%				
2022	-18.1%	-16.7%	-15.3%	-13.9%	-12.4%	-11.0%	-9.5%	-8.0%	-6.5%	-5.0%	-3.5%				
Annualized Return	10.4%	10.8%	11.2%	11.5%	11.9%	12.2%	12.5%	12.8%	13.1%	13.4%	13.6%	S&P vs US SCV Summary			
Standard Deviation	17.1%	17.1%	17.2%	17.4%	17.8%	18.3%	18.9%	19.7%	20.5%	21.5%	22.5%				
Worst 6 Months	-41.8%	-42.7%	-43.6%	-44.4%	-45.3%	-46.1%	-47.0%	-47.8%	-48.7%	-49.5%	-50.3%	S&P	US SCV		
Worst 12 Months	-43.3%	-43.9%	-44.5%	-45.1%	-45.7%	-46.3%	-46.9%	-47.5%	-48.1%	-48.7%	-49.3%	24	29		
Worst 36 Mo (An'lzd)	-16.1%	-15.8%	-16.5%	-17.2%	-17.9%	-18.6%	-19.3%	-20.0%	-20.7%	-21.4%	-22.1%	Avg. Out-Perf Rtn.			
Worst 60 Mos Annualized	-6.7%	-6.8%	-6.9%	-7.0%	-7.2%	-7.3%	-7.5%	-7.6%	-7.8%	-8.0%	-8.2%	S&P	US SCV		
Worst Drawdown	-51.0%	-51.6%	-52.4%	-53.5%	-54.7%	-55.8%	-56.9%	-58.0%	-59.1%	-60.1%	-61.2%	11.0%	16.5%		

© 2023 The Merriman Financial Education Foundation