

US SCV Index Portfolio Historical Risk & Return

1928-2022 Annualized Calendar Year Total Returns *

Time Period	Range of Annualized Returns	Average CAGR	No. of Periods	No. Negative Returns
1 Year	-55.4% to 124.7%	17.5%	95 (1-yr)	30 (31.6%)
2 Years	-49.8% to 65.1%	15.5%	94 (2-yr)	19 (20.2%)
3 Years	-45.9% to 65.2%	14.8%	93 (3-yr)	13 (14.0%)
5 Years	-28.5% to 43.2%	14.8%	91 (5-yr)	8 (8.8%)
10 Years	-7.1% to 32.5%	15.2%	86 (10-yr)	3 (3.5%)
15 Years	-1.9% to 26.5%	15.6%	81 (15-yr)	1 (1.2%)
20 Years	4.4% to 23.4%	15.9%	76 (20-yr)	0 (0.0%)
25 Years	6.6% to 22.4%	16.0%	71 (25-yr)	0 (0.0%)
30 Years	8.4% to 22.7%	16.1%	66 (30-yr)	0 (0.0%)
35 Years	9.4% to 19.4%	16.1%	61 (35-yr)	0 (0.0%)
40 Years	11.6% to 19.1%	16.2%	56 (40-yr)	0 (0.0%)

* Source: Dimensional Returns Web

Index Portfolio Asset Classes: US SCV