

## Table J1b - Equity Index Returns: 1-yr Periods (1928-2025)

### Summary Results for 98 1-year Periods (1928-2025)

|                           | US LCB<br>(S&P 500) | US LCV      | US SCB      | US SCV       | US 4-Fund<br>(SCV, LCV,<br>SCB, LCB) | US All<br>Value<br>(SCV, LCV) | US 2-Fund<br>(S&P 500,<br>SCV) |
|---------------------------|---------------------|-------------|-------------|--------------|--------------------------------------|-------------------------------|--------------------------------|
| In 98 yrs \$100 grows to: | \$1,398,153         | \$2,995,154 | \$5,934,277 | \$17,581,909 | \$5,590,514                          | \$8,435,109                   | \$6,425,538                    |
| CRR over 98 years         | 10.2%               | 11.1%       | 11.9%       | 13.1%        | 11.8%                                | 12.3%                         | 12.0%                          |
| Best 1 year return        | 54.0%               | 92.5%       | 111.2%      | 124.7%       | 96.2%                                | 110.4%                        | 89.9%                          |
| Worst 1 year return       | -43.3%              | -61.1%      | -48.3%      | -55.4%       | -51.8%                               | -58.1%                        | -49.4%                         |
| SD over 98 years          | 19.6%               | 22.4%       | 27.8%       | 30.8%        | 24.1%                                | 26.0%                         | 23.9%                          |

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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