

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

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

	US LCB (S&P 500)	US LCV	US SCB	US SCV	US 4-Fund (SCV, LCV, SCB, LCB)	US All Value (SCV, LCV)	US 2-Fund (S&P 500, 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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