Table K7a - Sound Investing Portfolios, S&P 500 & US SCV (1928-2024)

- Return Rank Frequency -

Portfolio	Asset Alloc.	CAGR	Quintile Rank Frequency 1	2	3	4	5
US SCV	100% US SCV	13.2%	**46**	5	4	9	33
			47%	5%	4%	9%	34%
				<--------------- **19%** --------------->			
US All Val	50% US SCV 50% US LCV	12.3%	10	**43**	6	24	14
			10%	44%	6%	25%	14%
				<--------------- **75%** --------------->			
US 2 Fund	50% US SCV 50% S&P 500	12.0%	0	28	**35**	34	0
			0%	29%	36%	35%	0%
				<-------------- **100%** -------------->			
US 4 Fund	25% US SCV 25% US SCB 25% US LCV 25% US LCB	11.9%	3	17	**49**	27	1
			3%	18%	51%	28%	1%
				<--------------- **96%** --------------->			
S&P 500	100% S&P 500	10.2%	38	4	3	3	**49**
			39%	4%	3%	3%	51%
				<--------------- **10%** --------------->			