

MARKET STATISTICS - MAY 2026

All figures in CAD unless mentioned otherwise

| | WWW.PWLCAPITAL.COM | 1 MONTH | YEAR-TO-DATE | 1 YEAR | 3 YEARS | 5 YEARS | 10 YEARS | 20 YEARS | 30 YEARS | 5-YEAR STD DEV |
|-----------------------|---|---------|--------------|--------|---------|---------|----------|----------|----------|----------------|
| INCOME | Canadian Fixed Income | | | | | | | | | |
| | Inflation (one month lag) | 0.36 | 1.82 | 2.82 | 2.41 | 3.67 | 2.73 | 2.16 | 2.15 | 1.45 |
| | Treasury Bills | 0.19 | 0.92 | 2.45 | 3.76 | 2.97 | 1.93 | 1.68 | 2.30 | 0.50 |
| | Short Term bonds | 0.74 | 1.07 | 3.02 | 4.77 | 2.13 | 2.10 | 2.97 | 3.96 | 2.58 |
| | Total Bond Market | 1.36 | 1.72 | 2.99 | 4.25 | 0.89 | 1.84 | 3.59 | 4.88 | 6.12 |
| | Global Fixed Income | | | | | | | | | |
| | Short Term Bonds (Hedged to CAD) | 0.23 | 0.21 | 1.77 | 3.20 | 1.20 | 1.42 | 2.34 | 3.24 | 2.28 |
| | Total Bond Market (Hedged to CAD) | 0.50 | 0.08 | 1.98 | 3.00 | 0.00 | 1.39 | 3.25 | NA | 4.89 |
| | Other Income Securities | | | | | | | | | |
| | Canadian REITs | 2.03 | 11.28 | 14.98 | 7.27 | 3.18 | 5.69 | 7.56 | NA | 16.97 |
| | Canadian Utilities | 3.59 | 15.30 | 25.79 | 13.48 | 8.90 | 10.25 | 8.38 | NA | 12.84 |
| | Canadian Preferred Shares | 1.56 | 4.47 | 16.11 | 17.42 | 6.44 | 7.01 | NA | NA | 10.21 |
| U.S. High Yield (USD) | 1.99 | 2.14 | 8.06 | 9.93 | 7.20 | 6.42 | 7.86 | 6.67 | 6.20 | |
| Global REITs | 1.41 | 10.00 | 14.09 | 11.07 | 5.66 | 4.59 | 5.60 | NA | 14.73 | |
| EQUITIES | Canadian Equity | | | | | | | | | |
| | Total Market | 2.52 | 10.61 | 36.06 | 24.64 | 15.30 | 12.77 | 8.72 | 9.23 | 12.49 |
| | Large & Mid Cap Value | 2.89 | 19.01 | 52.15 | 31.53 | 20.78 | 15.18 | 10.18 | 10.56 | 13.00 |
| | Large & Mid Cap Growth | 1.48 | 0.98 | 17.89 | 18.77 | 10.22 | 9.96 | 6.85 | 6.87 | 14.19 |
| | Small Cap | 5.52 | 17.00 | 63.25 | 30.88 | 18.09 | 14.33 | 8.80 | NA | 16.17 |
| | Small Cap Value | 2.84 | 15.06 | 52.58 | 25.83 | 18.34 | 13.25 | 8.90 | NA | 15.30 |
| | Small Cap Growth | 7.65 | 19.17 | 73.25 | 35.75 | 17.32 | 15.08 | 8.41 | NA | 18.43 |
| | U.S. Equity | | | | | | | | | |
| | Total Market | 6.64 | 11.70 | 30.04 | 23.80 | 15.96 | 15.71 | 12.45 | 10.31 | 13.62 |
| | Total Market in USD | 5.07 | 11.20 | 29.45 | 23.16 | 12.92 | 15.12 | 11.19 | 10.27 | 16.07 |
| | Large & Mid Cap Value | 4.49 | 14.19 | 29.14 | 20.06 | 13.40 | 11.94 | 9.94 | 9.43 | 12.06 |
| | Large & Mid Cap Growth | 8.80 | 8.71 | 29.25 | 27.10 | 18.85 | 19.47 | 15.00 | 10.93 | 17.59 |
| | Small Cap | 5.93 | 18.68 | 43.74 | 20.88 | 9.48 | 11.78 | 9.95 | 8.68 | 18.30 |
| | Small Cap Value | 4.32 | 18.83 | 45.02 | 20.84 | 10.16 | 11.06 | 9.06 | 9.56 | 17.89 |
| | Small Cap Growth | 7.42 | 18.51 | 42.52 | 20.84 | 8.65 | 12.10 | 10.58 | 7.36 | 19.75 |
| | International Equity (Developed) | | | | | | | | | |
| | Large & Mid Cap | 4.61 | 9.86 | 23.36 | 18.77 | 11.72 | 9.84 | 6.74 | 5.87 | 11.90 |
| | Large & Mid Cap in Local Currencies | 3.69 | 9.12 | 22.28 | 16.27 | 11.04 | 9.95 | 6.21 | 6.17 | 10.92 |
| | Large & Mid Cap Value | 3.59 | 10.90 | 30.67 | 24.68 | 15.82 | 10.53 | 6.43 | 6.46 | 11.38 |
| | Large & Mid Cap Growth | 5.74 | 8.73 | 16.25 | 13.04 | 7.54 | 8.88 | 6.87 | 5.11 | 14.26 |
| | Small Cap | 5.50 | 12.30 | 27.81 | 18.92 | 8.65 | 9.02 | 7.36 | NA | 13.74 |
| | Small Cap Value | 4.57 | 10.12 | 28.98 | 21.15 | 11.07 | 9.40 | 7.65 | NA | 12.91 |
| | Small Cap Growth | 6.14 | 14.63 | 26.27 | 16.62 | 6.15 | 8.47 | 7.47 | NA | 15.18 |
| | Emerging Markets | | | | | | | | | |
| | Large & Mid Cap | 11.35 | 26.30 | 55.86 | 26.42 | 10.94 | 11.69 | 8.43 | 7.09 | 16.35 |
| | Large & Mid Cap Value | 11.84 | 26.09 | 54.22 | 26.31 | 13.17 | 11.32 | 8.15 | NA | 14.86 |
| | Large & Mid Cap Growth | 10.86 | 26.48 | 57.38 | 26.49 | 8.83 | 11.95 | 8.61 | NA | 18.15 |
| Small Cap | 4.93 | 17.01 | 32.84 | 20.35 | 11.75 | 11.10 | 9.16 | 6.27 | 13.15 | |
| Small Cap Value | 6.33 | 17.84 | 32.73 | 21.56 | 13.19 | 12.16 | 10.31 | 8.52 | 12.27 | |
| Small Cap Growth | 3.52 | 16.16 | 32.84 | 19.13 | 10.31 | 9.96 | 7.95 | 4.77 | 14.40 | |

Source: DFA Web