

# MARKET STATISTICS - JUNE 2025

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 | 5-YEAR STD DEV |
|--------------------|----------------------------------------------------|---------|--------------|--------|---------|---------|----------|----------|----------------|
| INCOME             | <b>Fixed Income</b>                                |         |              |        |         |         |          |          |                |
|                    | Canadian Treasury Bills                            | 0.23    | 1.43         | 3.62   | 4.12    | 2.54    | 1.75     | 1.72     | 0.59           |
|                    | Canadian Short-Term Bonds                          | 0.27    | 2.19         | 6.34   | 4.42    | 1.76    | 1.94     | 2.85     | 2.51           |
|                    | Global Government Short-Term Bonds (hedged to CAD) | 0.42    | 2.09         | 4.70   | 2.90    | 0.95    | 1.47     | 2.30     | 2.22           |
|                    | Canadian Total Bond Market                         | 0.06    | 1.44         | 6.13   | 4.31    | -0.38   | 1.88     | 3.43     | 6.12           |
|                    | Total Global Bond Market (hedged to CAD)           | 0.80    | 1.94         | 4.61   | 2.61    | -0.34   | 1.81     | 3.14     | 4.86           |
|                    | <b>Real Estate Investment Trusts (REITs)</b>       |         |              |        |         |         |          |          |                |
|                    | Canadian REITs                                     | 1.19    | 8.44         | 14.46  | 2.71    | 6.22    | 5.29     | 7.60     | 18.26          |
|                    | Global REITs                                       | -0.47   | -1.33        | 9.45   | 5.84    | 6.28    | 4.79     | 4.93     | 14.61          |
| EQUITY             | <b>Canadian Equity</b>                             |         |              |        |         |         |          |          |                |
|                    | Total Market                                       | 2.91    | 10.17        | 26.37  | 16.09   | 15.02   | 9.61     | 8.22     | 12.77          |
|                    | Value                                              | 2.77    | 9.18         | 31.37  | 16.01   | 20.15   | 11.16    | 8.98     | 14.55          |
|                    | Growth                                             | 2.72    | 10.73        | 23.65  | 17.79   | 10.49   | 7.69     | 7.20     | 14.00          |
|                    | Small Cap Value                                    | 4.55    | 11.84        | 22.05  | 14.61   | 19.22   | 8.74     | 7.96     | 14.88          |
|                    | Small Cap Growth                                   | 7.11    | 16.61        | 32.84  | 19.67   | 12.47   | 10.13    | 7.16     | 15.06          |
|                    | <b>U.S. Equity</b>                                 |         |              |        |         |         |          |          |                |
|                    | Total Market                                       | 4.27    | 0.18         | 14.77  | 21.34   | 16.05   | 13.95    | 11.12    | 13.57          |
|                    | Value                                              | 2.62    | 0.42         | 13.18  | 14.90   | 14.02   | 10.14    | 8.69     | 12.60          |
|                    | Growth                                             | 5.55    | 0.51         | 16.68  | 28.14   | 18.24   | 18.04    | 13.59    | 17.10          |
|                    | Small Cap Value                                    | 4.14    | -8.26        | 5.05   | 9.49    | 12.56   | 7.65     | 7.37     | 19.14          |
|                    | Small Cap Growth                                   | 5.07    | -5.72        | 9.22   | 14.51   | 7.50    | 8.08     | 9.07     | 19.97          |
|                    | <b>International Equity</b>                        |         |              |        |         |         |          |          |                |
|                    | Total Market                                       | 1.72    | 13.37        | 17.85  | 17.78   | 10.97   | 7.43     | 6.51     | 12.10          |
|                    | Value                                              | 0.95    | 16.38        | 23.67  | 20.63   | 14.38   | 6.98     | 5.77     | 12.63          |
|                    | Growth                                             | 1.86    | 9.85         | 10.88  | 15.72   | 7.98    | 7.64     | 6.82     | 13.52          |
|                    | Small Cap Value                                    | 3.22    | 15.62        | 23.65  | 17.13   | 12.00   | 7.41     | 7.28     | 13.02          |
|                    | Small Cap Growth                                   | 3.87    | 13.59        | 20.37  | 13.75   | 6.60    | 7.32     | 7.37     | 14.57          |
|                    | <b>Emerging Markets Equity</b>                     |         |              |        |         |         |          |          |                |
|                    | Total Market                                       | 5.15    | 8.59         | 13.75  | 12.31   | 7.70    | 5.87     | 7.20     | 12.90          |
|                    | Value                                              | 4.21    | 8.72         | 12.14  | 12.31   | 9.15    | 4.93     | 6.64     | 12.12          |
|                    | Growth                                             | 6.10    | 9.62         | 17.15  | 11.25   | 4.72    | 6.42     | 7.32     | 15.42          |
|                    | Small Cap Value                                    | 4.03    | 5.14         | 7.72   | 16.89   | 15.23   | 7.91     | 9.56     | 11.61          |
|                    | Small Cap Growth                                   | 5.75    | 4.65         | 8.06   | 15.04   | 12.62   | 5.80     | 7.56     | 13.78          |
|                    | <b>International and Emerging Markets Equity</b>   |         |              |        |         |         |          |          |                |
|                    | Large and Mid Cap                                  | 2.59    | 11.89        | 16.44  | 16.16   | 9.87    | 6.91     | 6.32     | 11.20          |

Sources: DFA Web

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