

Eye on the Indices

As of 12/31/2021

	Return						
	QTD	YTD	1 Year	3 Years	5 Years	10 Years	20 Years
Total Market							
NASDAQ Composite TR USD	8.4	22.2	22.2	34.3	25.0	21.0	—
Russell 3000 TR USD	9.3	25.7	25.7	25.8	18.0	16.3	9.7
Wilshire 5000 Total Mkt TR USD	9.6	26.7	26.7	26.1	18.1	16.4	9.9
Large Cap							
DJ Industrial Average TR USD	7.9	20.9	20.9	18.5	15.5	14.2	9.3
Russell 1000 TR USD	9.8	26.5	26.5	26.2	18.4	16.5	9.7
S&P 500 TR USD	11.0	28.7	28.7	26.1	18.5	16.6	9.5
Large Cap Growth							
Russell 1000 Growth TR USD	11.6	27.6	27.6	34.1	25.3	19.8	10.9
S&P 500 Growth TR USD	13.4	32.0	32.0	32.2	24.1	19.2	10.7
Large Cap Value							
Russell 1000 Value TR USD	7.8	25.2	25.2	17.6	11.2	13.0	8.3
S&P 500 Value TR USD	8.3	24.9	24.9	18.6	11.9	13.3	8.0
Small Cap							
Russell 2000 TR USD	2.1	14.8	14.8	20.0	12.0	13.2	9.4
S&P SmallCap 600 TR USD	5.6	26.8	26.8	20.1	12.4	14.5	10.7
Small Cap Growth							
Russell 2000 Growth TR USD	0.0	2.8	2.8	21.2	14.5	14.1	9.2
S&P SmallCap 600 Growth TR USD	6.9	22.6	22.6	21.1	14.4	15.4	11.4
Small Cap Value							
Russell 2000 Value TR USD	4.4	28.3	28.3	18.0	9.1	12.0	9.2
S&P SmallCap 600 Value TR USD	4.5	30.9	30.9	18.7	10.2	13.5	10.0
International Equity Indices							
MSCI EAFE NR USD	2.7	11.3	11.3	13.5	9.5	8.0	6.3
MSCI EM NR USD	-1.3	-2.5	-2.5	10.9	9.9	5.5	9.6
MSCI World ex USA NR USD	3.1	12.6	12.6	14.1	9.6	7.8	6.5
MSCI World Ex USA Small Cap NR USD	0.4	11.1	11.1	16.3	11.0	10.0	9.7
Alternative Indices							
Bloomberg Commodity TR USD	-1.6	27.1	27.1	9.9	3.7	-2.9	1.8
DJ US Select REIT TR USD	17.2	45.9	45.9	16.8	9.7	10.7	10.4
S&P GSCI TR USD	1.5	40.4	40.4	8.0	2.8	-5.5	-0.1
Fixed Income Indices							
Bloomberg Municipal 3 Yr 2-4 TR USD	-0.1	0.4	0.4	2.3	2.1	1.6	2.6
Bloomberg Municipal 7 Yr 6-8 TR USD	0.2	0.4	0.4	4.0	3.6	3.0	4.3
Bloomberg US Agency TR USD	-0.6	-1.3	-1.3	3.3	2.7	2.0	3.5
Bloomberg US Agg Bond TR USD	0.0	-1.5	-1.5	4.8	3.6	2.9	4.3
Bloomberg US Govt/Credit Interm TR USD	-0.6	-1.4	-1.4	3.9	2.9	2.4	3.8
Bloomberg US Govt/Credit TR USD	0.2	-1.7	-1.7	5.5	4.0	3.1	4.5
Bloomberg US Treasury US TIPS TR USD	2.4	6.0	6.0	8.4	5.3	3.1	5.3
FTSE WGBI 1-3 Yr Hdq USD	-0.4	-0.4	-0.4	1.7	1.6	1.3	2.2

The performance data quoted represents past performance. Past performance does not guarantee future results. Please review the additional disclosures included on the last page of this report.

Eye on the Indices

As of 12/31/2021

	Return									
	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012
Total Market										
NASDAQ Composite TR USD	22.2	44.9	36.7	-2.8	29.6	8.9	7.0	14.7	40.1	17.5
Russell 3000 TR USD	25.7	20.9	31.0	-5.2	21.1	12.7	0.5	12.6	33.6	16.4
Wilshire 5000 Total Mkt TR USD	26.7	20.8	31.0	-5.3	21.0	13.4	0.7	12.7	33.1	16.1
Large Cap										
DJ Industrial Average TR USD	20.9	9.7	25.3	-3.5	28.1	16.5	0.2	10.0	29.7	10.2
Russell 1000 TR USD	26.5	21.0	31.4	-4.8	21.7	12.1	0.9	13.2	33.1	16.4
S&P 500 TR USD	28.7	18.4	31.5	-4.4	21.8	12.0	1.4	13.7	32.4	16.0
Large Cap Growth										
Russell 1000 Growth TR USD	27.6	38.5	36.4	-1.5	30.2	7.1	5.7	13.0	33.5	15.3
S&P 500 Growth TR USD	32.0	33.5	31.1	0.0	27.4	6.9	5.5	14.9	32.8	14.6
Large Cap Value										
Russell 1000 Value TR USD	25.2	2.8	26.5	-8.3	13.7	17.3	-3.8	13.5	32.5	17.5
S&P 500 Value TR USD	24.9	1.4	31.9	-9.0	15.4	17.4	-3.1	12.4	32.0	17.7
Small Cap										
Russell 2000 TR USD	14.8	20.0	25.5	-11.0	14.6	21.3	-4.4	4.9	38.8	16.3
S&P SmallCap 600 TR USD	26.8	11.3	22.8	-8.5	13.2	26.6	-2.0	5.8	41.3	16.3
Small Cap Growth										
Russell 2000 Growth TR USD	2.8	34.6	28.5	-9.3	22.2	11.3	-1.4	5.6	43.3	14.6
S&P SmallCap 600 Growth TR USD	22.6	19.6	21.1	-4.1	14.8	22.2	2.8	3.9	42.7	14.6
Small Cap Value										
Russell 2000 Value TR USD	28.3	4.6	22.4	-12.9	7.8	31.7	-7.5	4.2	34.5	18.1
S&P SmallCap 600 Value TR USD	30.9	2.5	24.5	-12.6	11.5	31.3	-6.7	7.5	40.0	18.2
International Equity Indices										
MSCI EAFE NR USD	11.3	7.8	22.0	-13.8	25.0	1.0	-0.8	-4.9	22.8	17.3
MSCI EM NR USD	-2.5	18.3	18.4	-14.6	37.3	11.2	-14.9	-2.2	-2.6	18.2
MSCI World ex USA NR USD	12.6	7.6	22.5	-14.1	24.2	2.7	-3.0	-4.3	21.0	16.4
MSCI World Ex USA Small Cap NR USD	11.1	12.8	25.4	-18.1	31.0	4.3	5.5	-5.3	25.6	17.5
Alternative Indices										
Bloomberg Commodity TR USD	27.1	-3.1	7.7	-11.2	1.7	11.8	-24.7	-17.0	-9.5	-1.1
DJ US Select REIT TR USD	45.9	-11.2	23.1	-4.2	3.8	6.7	4.5	32.0	1.2	17.1
S&P GSCI TR USD	40.4	-23.7	17.6	-13.8	5.8	11.4	-32.9	-33.1	-1.2	0.1
Fixed Income Indices										
Bloomberg Municipal 3 Yr 2-4 TR USD	0.4	3.0	3.7	1.8	1.6	0.1	1.2	1.2	1.3	1.9
Bloomberg Municipal 7 Yr 6-8 TR USD	0.4	5.1	6.7	1.7	4.5	-0.5	3.3	6.1	-1.0	4.2
Bloomberg US Agency TR USD	-1.3	5.5	5.9	1.3	2.1	1.4	1.0	3.6	-1.4	2.2
Bloomberg US Agg Bond TR USD	-1.5	7.5	8.7	0.0	3.5	2.6	0.5	6.0	-2.0	4.2
Bloomberg US Govt/Credit Interm TR USD	-1.4	6.4	6.8	0.9	2.1	2.1	1.1	3.1	-0.9	3.9
Bloomberg US Govt/Credit TR USD	-1.7	8.9	9.7	-0.4	4.0	3.0	0.1	6.0	-2.4	4.8
Bloomberg US Treasury US TIPS TR USD	6.0	11.0	8.4	-1.3	3.0	4.7	-1.4	3.6	-8.6	7.0
FTSE WGBI 1-3 Yr Hdg USD	-0.4	2.3	3.3	2.1	0.9	1.2	0.7	1.0	0.8	1.4

The performance data quoted represents past performance. Past performance does not guarantee future results. Please review the additional disclosures included on the last page of this report.

Eye on the Indices

As of 12/31/2021

The performance data quoted represents past performance. Past performance does not guarantee future results. Current performance may be lower or higher than the performance information quoted.

Returns are shown in percent and those of one year or longer have been annualized.

Returns listed assume reinvestment of all dividend and capital gain distributions; they do not reflect the deduction of any fees charged by an independent investment advisor or other service provider to an individual account. Such fee, if taken into consideration, will reduce the performance quoted above.

Investors cannot invest directly in an index. Indexes are unmanaged and reflect reinvested dividends and/or distributions, but do not reflect sales charges, commissions, expenses or taxes.

Index used for comparison is deemed the best available and may differ from prospectus index. Some indexes are not available for full period of the fund.

This information is being provided as a convenience and is not an offer to sell. Information from sources deemed reliable, but its accuracy cannot be guaranteed. The Fund and Index providers listed in this report are unaffiliated with Buckingham Strategic Partners. Please contact your financial advisor if you have any questions about your investments. Source: Morningstar Direct

© 2022 Buckingham Wealth Partners, LLC. Buckingham Strategic Wealth, LLC and Buckingham Strategic Partners, LLC (collectively, Buckingham Wealth Partners). IRN-20-1142