

CURRENT AS OF NOVEMBER 30, 2025

MOST RECENT 

MEAN 

TYPICAL RANGE 

HISTORICAL RANGE 

Large Cap U.S. Equity

(from 11/1979)



Large Cap Defensive U.S. Equity

(from 06/1997)



Large Cap Dynamic U.S. Equity

(from 06/1997)



Small Cap U.S. Equity

(from 11/1979)



Non-U.S. Equity

(from 12/1969)



Global Equity

(from 12/1987)



Emerging Markets

(from 12/1969)



Commodities

(from 12/1992)



Global Infrastructure

(from 11/2002)



Global Real Estate

(from 02/2006)



Cash

(from 12/1978)



Global High Yield Bonds

(from 12/1998)



Emerging Markets Debt

(from 12/2003)



U.S. Bonds

(from 12/1976)



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FREQUENTLY ASKED QUESTIONS

What is the Asset Class Dashboard?

In an effort to help you contextualize recent asset class performance for your clients, the Asset Class Dashboard contrasts the current and historical returns for a sample of asset classes (represented by relevant indexes).

How should I interpret the chart?

In simple terms, the chart shows you the relationship of the most recent value to the typical historical range for each asset class.

The orange marker represents the most recent 12-month return for the asset class.

A white line within the blue bar represents the mean of the historical observations.

The blue color band represents the typical range of rolling 12-month returns for the asset class.

The grey bar shows the full range of historical rolling 12-month returns for each asset class with the lowest recorded value shown on the left side and the highest recorded value on the right.

If the most recent value (orange marker) lies inside the blue band, that indicates more typical behavior for the asset class. If it lies outside, that points to extreme behavior.

To learn more about the index used to track performance of each indicator, hover over any asset class label.

How can I use this dashboard to talk to my clients?

You can use this with a variety of clients. For example:

Clients on the sidelines - direct their attention to the Cash line and point out how narrow the historical range of returns for cash has been - and that it's unlikely to help most investors achieve financial security.

Clients with whom you want to recalibrate expectations about returns - point out asset classes for which the recent 12-month returns are outside the historically "typical" return range. Explain how based on the idea that prices and returns eventually move back towards the average in the long-term, it's likely that returns will revert to a more typical level going forward.

For all clients - focus on the range of typical returns, not the mean. Draw your client's attention to the fact that the average return (represented by the dark blue vertical line in the blue bar) across all the asset classes in the chart is very similar. However, caution your clients not to use that single point return as a guide for what might be expected in the future. Instead, explain that point-estimates for returns are helpful because of the simplicity of contextualizing a single number.

Can I use the Asset Class Dashboard as a market timing tool?

No. The Asset Class Dashboard is not meant to serve as a direct prediction regarding the future performance of any financial market. It is a backwards looking representation that reports on historical returns and is not intended to predict or guarantee future investment performance of any sort.

How often is it updated?

The Dashboard is updated monthly after month end returns are released for each index.