

# MSCI US Investable Market 2500 Index (USD)

The **MSCI US Investable Market 2500 Index** is designed to measure the performance of the large, mid and small cap segment of the US equity market. The index represents approximately 99% of the free float-adjusted market capitalization in the US equity market.

For a complete description of the index methodology, please see [Index methodology - MSCI](#).

## CUMULATIVE INDEX PERFORMANCE – GROSS RETURNS (USD) (MAR 2010 – MAR 2025)



## ANNUAL PERFORMANCE (%)

Year	MSCI US Investable Market 2500	MSCI US Broad Market	MSCI World IMI
2024	23.82	23.81	18.04
2023	26.26	26.21	23.50
2022	-19.24	-19.23	-17.81
2021	26.13	26.10	21.56
2020	21.01	21.02	16.48
2019	31.09	31.07	28.20
2018	-5.27	-5.28	-8.93
2017	21.22	21.21	23.09
2016	12.63	12.67	8.82
2015	0.61	0.57	-0.26
2014	12.71	12.66	5.07
2013	33.51	33.62	28.09
2012	16.40	16.44	16.75
2011	1.15	1.08	-5.53

## INDEX PERFORMANCE – GROSS RETURNS (%) (MAR 31, 2025)

	1 Mo	3 Mo	1 Yr	YTD	ANNUALIZED				Since May 30, 2003
					3 Yr	5 Yr	10 Yr		
MSCI US Investable Market 2500	-5.92	-4.84	7.16	-4.84	8.24	18.36	11.88	10.62	
MSCI US Broad Market	-5.93	-4.85	7.15	-4.85	8.23	18.35	11.86	10.63	
MSCI World IMI	-4.32	-1.88	6.73	-1.88	7.44	16.38	9.71	9.47	

## FUNDAMENTALS (MAR 31, 2025)

Div Yld (%)	P/E	P/E Fwd	P/BV
1.40	25.37	20.25	4.32
1.40	25.54	na	4.31
1.88	21.48	17.81	3.06

## INDEX RISK AND RETURN CHARACTERISTICS (MAR 31, 2025)

	Turnover (%) <sup>1</sup>	ANNUALIZED STD DEV (%) <sup>2</sup>			SHARPE RATIO <sup>2,3</sup>			Since May 31, 1994	MAXIMUM DRAWDOWN	
		3 Yr	5 Yr	10 Yr	3 Yr	5 Yr	10 Yr		(%)	Period YYYY-MM-DD
MSCI US Investable Market 2500	1.91	17.85	17.44	15.92	0.30	0.91	0.67	0.63	55.29	2007-10-09–2009-03-09
MSCI US Broad Market	1.86	17.85	17.44	15.93	0.30	0.91	0.67	0.63	55.39	2007-10-09–2009-03-09
MSCI World IMI	2.05	16.95	16.53	15.29	0.26	0.85	0.56	0.42	57.69	2007-10-31–2009-03-09

<sup>1</sup> Last 12 months

<sup>2</sup> Based on monthly gross returns data

<sup>3</sup> Based on NY FED Overnight SOFR from Sep 1 2021 & on ICE LIBOR 1M prior that date

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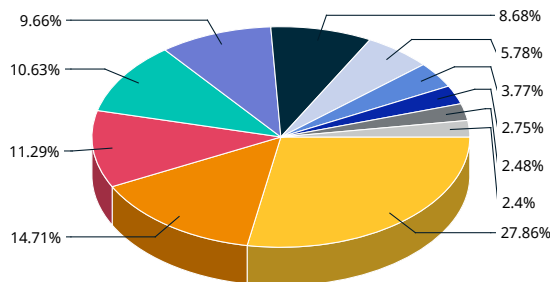
## INDEX CHARACTERISTICS

MSCI US Investable Market 2500	
<b>Number of Constituents</b>	2,469
<b>Mkt Cap (USD Millions)</b>	
<b>Index</b>	53,839,446.31
<b>Largest</b>	3,340,362.95
<b>Smallest</b>	4.92
<b>Average</b>	21,806.18
<b>Median</b>	2,534.92

## TOP 10 CONSTITUENTS

	Float Adj Mkt Cap (USD Billions)	Index Wt. (%)	Sector
APPLE	3,340.36	6.20	Info Tech
NVIDIA	2,654.23	4.93	Info Tech
MICROSOFT CORP	2,651.43	4.92	Info Tech
AMAZON.COM	1,800.53	3.34	Cons Discr
META PLATFORMS A	1,256.55	2.33	Comm Srvc
ALPHABET A	903.56	1.68	Comm Srvc
ALPHABET C	778.12	1.45	Comm Srvc
TESLA	748.73	1.39	Cons Discr
BROADCOM	745.56	1.38	Info Tech
BERKSHIRE HATHAWAY B	708.79	1.32	Financials
<b>Total</b>	<b>15,587.85</b>	<b>28.95</b>	

## SECTOR WEIGHTS



- Information Technology 27.86%
- Financials 14.71%
- Health Care 11.29%
- Consumer Discretionary 10.63%
- Industrials 9.66%
- Communication Services 8.68%
- Consumer Staples 5.78%
- Energy 3.77%
- Real Estate 2.75%
- Utilities 2.48%
- Materials 2.4%

The MSCI US Investable Market 2500 Index was launched on Nov 29, 2002. Data prior to the launch date is back-tested test (i.e. calculations of how the index might have performed over that time period had the index existed). There are frequently material differences between back-tested performance and actual results. Past performance – whether actual or back-tested – is no indication or guarantee of future performance.

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