

MSCI US IMI Industrials 25/50 Index (USD)

The **MSCI US IMI Industrials 25/50 Index** is designed to capture the large, mid and small cap segments of the US equity universe. All securities in the index are classified in the Industrials sector as per the Global Industry Classification Standard (GICS®). The index also applies certain investment limits to help ensure diversification—limits that are imposed on regulated investment companies, or RICs, under the current US Internal Revenue Code.

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 IMI Industrials 25/50	MSCI US Investable Market 2500
2024	17.05	23.82
2023	22.47	26.26
2022	-8.42	-19.24
2021	20.83	26.13
2020	12.43	21.01
2019	30.28	31.09
2018	-13.85	-5.27
2017	21.60	21.22
2016	20.43	12.63
2015	-3.55	0.61
2014	8.67	12.71
2013	42.13	33.51
2012	17.17	16.40
2011	-2.02	1.15

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

	1 Mo	3 Mo	1 Yr	YTD	ANNUALIZED			
					3 Yr	5 Yr	10 Yr	Since Nov 29, 2002
MSCI US IMI Industrials 25/50	-4.40	-2.47	2.75	-2.47	10.01	19.24	10.62	10.74
MSCI US Investable Market 2500	-5.92	-4.84	7.16	-4.84	8.24	18.36	11.88	10.62

INDEX RISK AND RETURN CHARACTERISTICS (MAR 31, 2025)

	Turnover (%) ¹	ANNUALIZED STD DEV (%) ²			SHARPE RATIO ^{2,3}			Since Nov 29, 2002	MAXIMUM DRAWDOWN	
		3 Yr	5 Yr	10 Yr	3 Yr	5 Yr	10 Yr		(%)	Period YYYY-MM-DD
MSCI US IMI Industrials 25/50	1.68	20.89	19.84	19.08	0.36	0.86	0.53	0.55	63.36	2007-10-09–2009-03-09
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

¹ Last 12 months

² Based on monthly gross returns data

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

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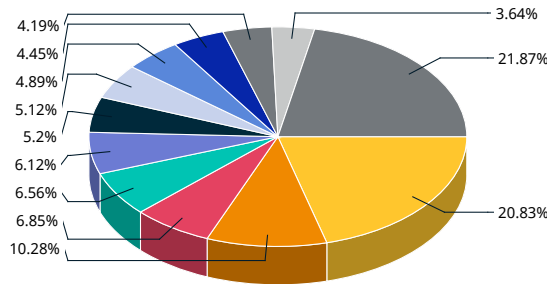
INDEX CHARACTERISTICS

MSCI US IMI Industrials 25/50	
Number of Constituents	387
Mkt Cap (USD Millions)	
Index	5,198,527.90
Largest	216,621.14
Smallest	32.59
Average	13,432.89
Median	3,426.53

TOP 10 CONSTITUENTS

	Float Adj Mkt Cap (USD Billions)	Index Wt. (%)
GE AEROSPACE	216.62	4.17
RTX	176.31	3.39
CATERPILLAR	159.23	3.06
UNION PACIFIC CORP	143.22	2.76
UBER TECHNOLOGIES	138.08	2.66
HONEYWELL INTERNATIONAL	137.69	2.65
BOEING CO	127.60	2.45
AUTOMATIC DATA PROCESS	124.49	2.39
DEERE & CO	121.44	2.34
EATON CORP PLC	107.43	2.07
Total	1,452.10	27.93

SUB-INDUSTRY WEIGHTS



- Aerospace & Defense 20.83%
- Industrial Machinery & Supplies & Components 10.28%
- Building Products 6.85%
- Electrical Components & Equipment 6.56%
- Construction Machinery & Heavy Transportation Equipment 6.12%
- Trading Companies & Distributors 5.2%
- Environmental & Facilities Services 5.12%
- Rail Transportation 4.89%
- Human Resource & Employment Services 4.45%
- Industrial Conglomerates 4.19%
- Research & Consulting Services 3.64%
- Other 21.87%

The MSCI US IMI Industrials 25/50 Index was launched on Sep 07, 2009. 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.

ABOUT MSCI

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