

# MSCI US Large Cap 300 Index (USD)

The **MSCI US Large Cap 300 Index** is designed to measure the performance of the large cap segment of the US equity market. The index represents approximately 71% 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 Large Cap 300	MSCI US Investable Market 2500	MSCI US Broad Market
2024	26.07	23.82	23.81
2023	29.15	26.26	26.21
2022	-19.80	-19.24	-19.23
2021	27.12	26.13	26.10
2020	21.58	21.01	21.02
2019	31.85	31.09	31.07
2018	-3.89	-5.27	-5.28
2017	22.33	21.22	21.21
2016	11.53	12.63	12.67
2015	1.60	0.61	0.57
2014	13.62	12.71	12.66
2013	32.07	33.51	33.62
2012	16.21	16.40	16.44
2011	2.43	1.15	1.08

## 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 Large Cap 300	-5.96	-4.63	8.73	-4.63	9.49	18.81	12.87	10.62	
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	

## FUNDAMENTALS (MAR 31, 2025)

Div Yld (%)	P/E	P/E Fwd	P/BV
1.35	25.29	20.80	5.17
1.40	25.37	20.25	4.32
1.40	25.54	na	4.31

## 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 30, 2003	MAXIMUM DRAWDOWN	
		3 Yr	5 Yr	10 Yr	3 Yr	5 Yr	10 Yr		(%)	Period YYYY-MM-DD
MSCI US Large Cap 300	2.88	17.46	17.19	15.48	0.37	0.94	0.74	0.55	54.05	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	0.55	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

<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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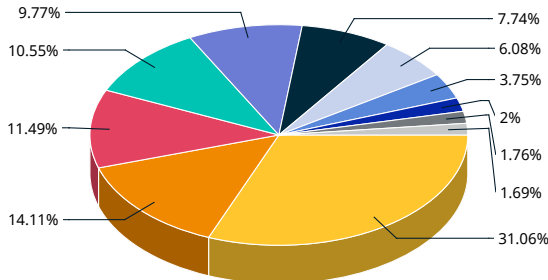
## INDEX CHARACTERISTICS

MSCI US Large Cap 300	
<b>Number of Constituents</b>	300
<b>Mkt Cap (USD Millions)</b>	
<b>Index</b>	44,126,361.25
<b>Largest</b>	3,340,362.95
<b>Smallest</b>	12,583.32
<b>Average</b>	147,087.87
<b>Median</b>	64,047.70

## TOP 10 CONSTITUENTS

	Float Adj Mkt Cap (USD Billions)	Index Wt. (%)	Sector
APPLE	3,340.36	7.57	Info Tech
NVIDIA	2,654.23	6.02	Info Tech
MICROSOFT CORP	2,651.43	6.01	Info Tech
AMAZON.COM	1,800.53	4.08	Cons Discr
META PLATFORMS A	1,256.55	2.85	Comm Srvc
ALPHABET A	903.56	2.05	Comm Srvc
ALPHABET C	778.12	1.76	Comm Srvc
TESLA	748.73	1.70	Cons Discr
BROADCOM	745.56	1.69	Info Tech
BERKSHIRE HATHAWAY B	708.79	1.61	Financials
<b>Total</b>	<b>15,587.85</b>	<b>35.33</b>	

## SECTOR WEIGHTS



- Information Technology 31.06%
- Financials 14.11%
- Health Care 11.49%
- Consumer Discretionary 10.55%
- Communication Services 9.77%
- Industrials 7.74%
- Consumer Staples 6.08%
- Energy 3.75%
- Utilities 2%
- Materials 1.76%
- Real Estate 1.69%

The MSCI US Large Cap 300 Index was launched on Mar 27, 2003. 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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