

MSCI US Small Cap 1750 Index (USD)

The **MSCI US Small Cap 1750 Index** is comprised of the remaining smallest 1,750 companies in the US Investable Market 2500 Index of the US equity market and designed to measure the performance of the small cap segment. The index represents approximately 11.5% of the free float-adjusted market capitalization of the US equity market.

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

CUMULATIVE INDEX PERFORMANCE – GROSS RETURNS (USD) (DEC 2009 – DEC 2024)



ANNUAL PERFORMANCE (%)

Year	MSCI US Small Cap 1750	MSCI US Investable Market 2500
2024	10.99	23.82
2023	19.08	26.26
2022	-17.82	-19.24
2021	21.08	26.13
2020	19.18	21.01
2019	25.86	31.09
2018	-10.99	-5.27
2017	15.16	21.22
2016	20.41	12.63
2015	-4.06	0.61
2014	6.09	12.71
2013	39.09	33.51
2012	18.20	16.40
2011	-2.75	1.15

INDEX PERFORMANCE – GROSS RETURNS (%) (DEC 31, 2024)

	1 Mo	3 Mo	1 Yr	YTD	ANNUALIZED				Since May 29, 1992
					3 Yr	5 Yr	10 Yr		
MSCI US Small Cap 1750	-7.81	0.48	10.99	10.99	2.80	9.41	8.86	10.82	
MSCI US Investable Market 2500	-3.03	2.64	23.82	23.82	8.08	14.02	12.64	10.67	

FUNDAMENTALS (DEC 31, 2024)

Div Yld (%)	P/E	P/E Fwd	P/BV
1.61	46.02	21.31	2.14
1.29	28.39	21.72	4.61

INDEX RISK AND RETURN CHARACTERISTICS (DEC 31, 2024)

	Turnover (%) ¹	ANNUALIZED STD DEV (%) ²			SHARPE RATIO ^{2,3}			Since May 29, 1992	MAXIMUM DRAWDOWN	
		3 Yr	5 Yr	10 Yr	3 Yr	5 Yr	10 Yr		(%)	Period YYYY-MM-DD
MSCI US Small Cap 1750	11.24	22.80	24.24	20.20	0.06	0.39	0.43	0.50	59.83	2007-07-13–2009-03-09
MSCI US Investable Market 2500	2.10	17.89	18.89	15.86	0.31	0.66	0.72	0.57	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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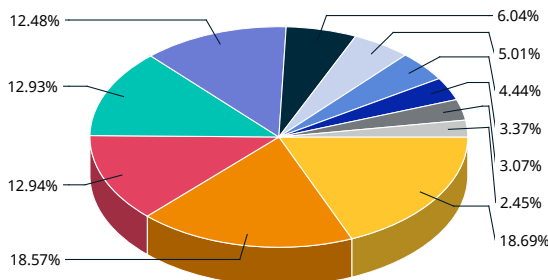
INDEX CHARACTERISTICS

MSCI US Small Cap 1750	
Number of Constituents	1,745
Mkt Cap (USD Millions)	
Index	3,743,632.88
Largest	13,293.93
Smallest	5.68
Average	2,145.35
Median	1,383.47

TOP 10 CONSTITUENTS

	Float Adj Mkt Cap (USD Billions)	Index Wt. (%)	Sector
GAMESTOP CORP A	13.29	0.36	Cons Discr
SPROUTS FARMERS MARKET	12.72	0.34	Cons Staples
BLUE OWL CAPITAL A	12.40	0.33	Financials
INSMED	11.27	0.30	Health Care
DUOLINGO A	10.92	0.29	Cons Discr
STIFEL FINANCIAL CORP	10.87	0.29	Financials
BWX TECHNOLOGIES	10.18	0.27	Industrials
EVERCORE PARTNERS	10.09	0.27	Financials
WOODWARD	9.93	0.27	Industrials
MURPHY USA	9.77	0.26	Cons Discr
Total	111.46	2.98	

SECTOR WEIGHTS



- Financials 18.69% ● Industrials 18.57% ● Health Care 12.94%
- Information Technology 12.93% ● Consumer Discretionary 12.48% ● Real Estate 6.04%
- Materials 5.01% ● Energy 4.44% ● Consumer Staples 3.37%
- Communication Services 3.07% ● Utilities 2.45%

The MSCI US Small Cap 1750 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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