

Financial Market Review



Performance of financial market indices As at February 28, 2014

(Returns are annualized for intervals longer than one year)

	Month	Quarter to date	Year to date	1 year	2 years	3 years	4 years	10 years
Consumer Price Index (Canada)*	0.3%	0.3%	0.3%	1.5%	1.0%	1.5%	1.7%	1.8%
Currency CAD/USD	0.4%	-4.2%	-4.2%	-7.6%	-6.1%	-4.8%	-1.9%	1.9%
Fixed Income Markets								
DEX 91 Day Treasury Bill	0.1%	0.2%	0.2%	1.0%	1.0%	1.0%	0.9%	2.0%
DEX Universe Bond Index	0.4%	3.0%	3.0%	1.5%	2.6%	5.0%	4.9%	5.2%
DEX Short Term Bond Index	0.2%	1.1%	1.1%	2.1%	2.4%	3.1%	2.9%	3.9%
DEX Mid Term Bond Index	0.5%	3.5%	3.5%	2.1%	3.4%	6.1%	5.8%	5.8%
DEX Long Term Bond Index	0.5%	5.6%	5.6%	0.0%	2.2%	7.5%	7.7%	7.0%
DEX High Yield Bond Index	1.3%	2.5%	2.5%	6.5%	9.7%	5.7%	7.7%	7.4%
DEX Real Return Bond Index	0.7%	5.8%	5.8%	-5.1%	-2.7%	4.2%	5.6%	6.2%
Canadian Equity Markets								
S&P/TSX Composite	3.9%	4.8%	4.8%	14.3%	9.4%	3.2%	8.2%	7.7%
S&P/TSX Capped Income Trust	3.4%	4.1%	4.1%	0.3%	6.5%	10.6%	15.5%	12.4%
S&P/TSX 60	3.7%	4.2%	4.2%	13.6%	9.8%	3.0%	7.6%	7.9%
S&P/TSX Small Cap	5.9%	7.7%	7.7%	16.4%	0.8%	-2.8%	6.0%	3.7%
MSCI Canada Growth	4.0%	6.2%	6.2%	12.2%	6.8%	-1.1%	4.9%	6.1%
MSCI Canada Value	3.4%	2.7%	2.7%	16.3%	12.3%	6.8%	10.0%	9.0%
Foreign Equity Markets (CA\$)								
S&P 500	4.2%	5.1%	5.1%	35.0%	26.4%	19.4%	17.8%	5.1%
MSCI EAFE	5.1%	5.5%	5.5%	28.4%	21.3%	11.3%	11.2%	4.6%
MSCI World	4.6%	5.3%	5.3%	31.0%	23.0%	14.6%	14.1%	4.7%
MSCI ACWI	4.4%	4.8%	4.8%	27.2%	20.4%	13.1%	12.9%	4.8%
MSCI Emerging Markets	2.9%	0.6%	0.6%	1.6%	3.2%	2.6%	4.9%	8.2%
Benchmark (DEX Univers / S&P/TSX / MSCI World)								
40%/30%/30%	2.7%	4.2%	4.2%	13.7%	10.6%	7.4%	8.8%	6.1%
45%/27,5%/27,5%	2.5%	4.1%	4.1%	12.6%	9.9%	7.2%	8.5%	6.0%
50%/25%/25%	2.3%	4.0%	4.0%	11.6%	9.2%	7.1%	8.2%	6.0%
55%/22,5%/22,5%	2.1%	3.9%	3.9%	10.5%	8.6%	6.9%	7.8%	5.9%
60%/20%/20%	1.9%	3.8%	3.8%	9.5%	7.9%	6.7%	7.5%	5.9%

Since 1969, Optimum Consultants & Actuaries Inc. has been offering high quality customized actuarial consulting solutions. Our firm is a member of the Optimum Group, a private financial group of international scope that is held by Québec interests.

For more information or if you have any questions, please contact your OPTIMUM consultant or Rocky Pomponi at 514 288-1620, extension 141.

* As at January 31, 2014

Retirement ♦ Asset management ♦ Group insurance ♦ Occupational health and safety

Head Office – 425 Maisonneuve Boulevard West, Suite 1120, Montreal, Quebec H3A 3G5

Québec Branch – 825 Lebourgneuf Boulevard, Suite 408, Québec, Quebec G2J 0B9

To reach us – Phone: 514 288-1620 • Toll-free: 1 800 361-8502 • Fax: 514 288-3317

www.optimumactuaires.com