

Financial Market Review



Performance of financial market indices As at May 31, 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%	2.0%	2.0%	1.2%	1.5%	1.9%	1.9%
Currency CAD/USD	0.8%	1.7%	-2.2%	-5.1%	-2.5%	-3.9%	-1.0%	2.2%
Fixed Income Markets								
FTSE TMX Canada 91 Day Treasury Bill	0.1%	0.1%	0.4%	1.0%	1.0%	1.0%	1.0%	2.0%
FTSE TMX Canada Universe Bond Index	1.2%	1.7%	4.5%	2.9%	2.4%	4.7%	5.2%	5.5%
FTSE TMX Canada Short Term Bond Index	0.4%	0.6%	1.7%	2.6%	2.3%	2.8%	3.2%	4.1%
FTSE TMX Canada Mid Term Bond Index	1.2%	1.8%	5.1%	3.6%	3.2%	5.7%	6.2%	6.2%
FTSE TMX Canada Long Term Bond Index	2.5%	3.3%	8.6%	2.8%	1.8%	7.2%	7.8%	7.6%
FTSE TMX Canada High Yield Bond Index	0.9%	1.8%	5.7%	8.1%	9.3%	6.2%	7.8%	7.7%
FTSE TMX Canada Real Return Bond Index	2.9%	3.8%	10.1%	0.0%	-2.2%	3.5%	5.9%	6.1%
Canadian Equity Markets								
S&P/TSX Composite	-0.2%	2.3%	8.5%	19.0%	16.1%	5.0%	8.6%	8.5%
S&P/TSX Capped Income Trust	1.3%	2.8%	8.2%	5.2%	7.7%	9.8%	16.6%	13.5%
S&P/TSX 60	0.0%	2.3%	8.0%	18.7%	16.4%	5.1%	7.9%	8.8%
S&P/TSX Small Cap	-1.7%	2.2%	10.3%	21.6%	11.0%	-1.6%	6.2%	4.2%
MSCI Canada Growth	0.1%	2.3%	10.0%	18.1%	13.7%	1.7%	5.6%	7.3%
MSCI Canada Value	-0.6%	2.0%	5.9%	19.9%	19.0%	7.9%	10.2%	9.6%
Foreign Equity Markets (CAD)								
S&P 500	1.5%	1.4%	7.2%	26.6%	26.9%	19.6%	18.9%	5.3%
MSCI EAFE	0.8%	1.4%	6.0%	24.1%	27.7%	11.5%	13.8%	4.7%
MSCI World	1.1%	1.3%	6.6%	24.9%	26.3%	14.9%	15.8%	4.9%
MSCI ACWI	1.3%	1.4%	6.5%	23.1%	24.5%	13.2%	14.6%	5.1%
MSCI Emerging Markets	2.7%	2.2%	5.8%	10.0%	12.1%	2.4%	6.5%	9.5%
Benchmark (FTSE TMX Canada Universe – S&P/TSX – MSCI World)								
40% – 30% – 30%	0.8%	1.8%	6.3%	14.0%	13.4%	8.0%	9.5%	6.5%
45% – 27.5% – 27.5%	0.8%	1.8%	6.2%	13.1%	12.4%	7.7%	9.1%	6.4%
50% – 25% – 25%	0.9%	1.8%	6.1%	12.1%	11.5%	7.4%	8.8%	6.4%
55% – 22.5% – 22.5%	0.9%	1.8%	5.9%	11.2%	10.5%	7.2%	8.4%	6.3%
60% – 20% – 20%	0.9%	1.8%	5.8%	10.2%	9.6%	6.9%	8.1%	6.2%

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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 April 30, 2014

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

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