

# INVESTMENT SCORECARD

May 2026

## ASSET CLASS RETURNS

Asset Class	Ticker	1M	3M	12M	3Y	5Y	10Y
US Large Cap Equities	SPY	5.26%	10.58%	29.82%	23.45%	14.03%	15.55%
US Large Cap Equities (C\$)	XUS.TO	6.92%	12.05%	30.24%	23.97%	16.93%	15.89%
US Small Cap Equities	IWM	4.48%	11.30%	43.15%	20.10%	6.49%	11.12%
Canadian Equities	XIC.TO	2.23%	1.56%	35.62%	24.44%	15.17%	12.72%
International Developed Equities (EAFE)	VEA	4.32%	2.35%	33.30%	21.06%	9.92%	10.28%
International Developed Equities (EAFE-C\$H)	VI.TO	5.38%	4.26%	34.37%	20.45%	13.44%	11.58%
Emerging Markets Broad	VWO	1.61%	3.06%	30.96%	19.02%	5.45%	9.02%
Emerging Markets Broad (C\$)	VEE.TO	3.22%	4.20%	30.87%	18.90%	7.63%	8.95%
Commodities	GSG	(7.53%)	22.50%	50.21%	19.43%	15.52%	7.51%
Gold	GLD	(1.54%)	(13.77%)	37.39%	31.77%	18.52%	13.65%
US REITs	VNQ	(0.65%)	1.08%	11.40%	10.53%	3.00%	5.45%
US Inflation Protected Bonds	TIP	0.19%	(0.10%)	4.67%	3.82%	1.07%	2.67%
US Total Bond Market	AGG	0.29%	(1.34%)	5.03%	3.85%	0.14%	1.66%
US IG Credit	LQD	0.86%	(0.95%)	6.15%	5.07%	0.11%	2.66%
US High Yield	JNK	0.48%	1.15%	7.76%	9.14%	3.83%	4.99%
Canadian Total Bond Market	XBB.TO	1.33%	(0.49%)	2.94%	4.19%	0.81%	1.73%
Canadian IG Credit	XCB.TO	1.15%	(0.08%)	4.19%	6.16%	2.36%	2.83%
US Long Term Treasury Bonds	TLT	0.53%	(4.53%)	3.91%	(1.99%)	(6.06%)	(1.39%)
Canadian Dollar	FXC	(1.48%)	(1.02%)	(0.25%)	0.64%	(1.78%)	(0.04%)
Hedge Funds	QAI	2.02%	4.33%	16.12%	10.46%	4.56%	3.93%

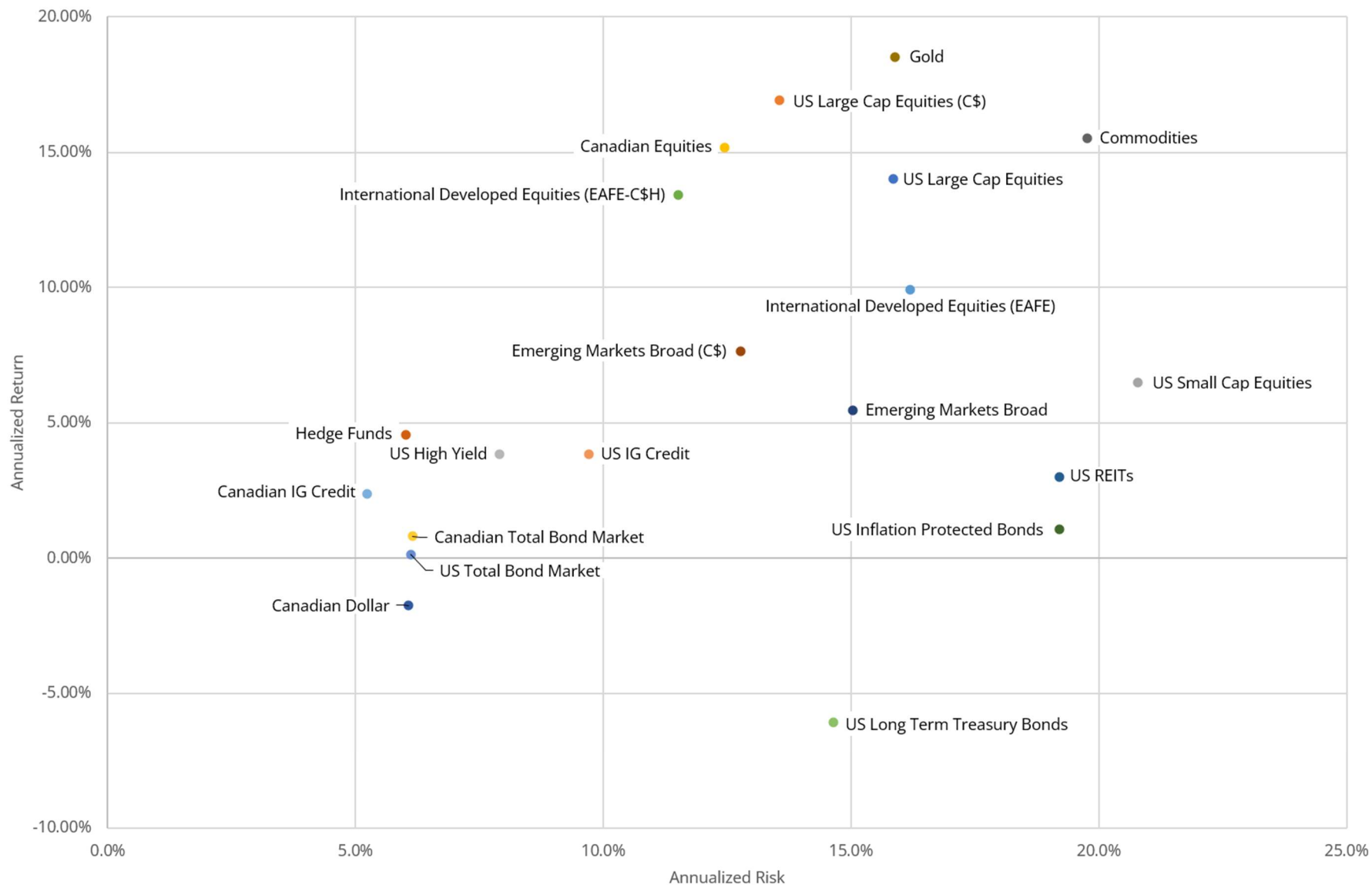
Source and Notes:

Return calculations performed by Anchor Pacific using FLARE™ by Anchor Pacific Financial Risk Labs Ltd. based on monthly values sourced from Yahoo Finance, QuoteMedia, and Funddata. All returns greater than one month assume reinvestment of dividends.

Risk measures the annualized standard deviation of monthly returns for 5 years based on the above data.

Returns are US\$ for SPY, IWM, VEA, VWO, GSG, TIP, AGG, JNK, LQD, TLT, FXC, QAI, and VNQ. Returns are C\$ for XUS.TO, XIC.TO, VI.TO, VEE.TO, XBB.TO, and XCB.TO. Please see disclaimer for further details.

Asset Class Risk and Return - 5 Year



## KEY INDEX LEVELS AND RATES

Index/Security	May 2026	1M Ago	3Ms Ago	6Ms Ago	12Ms Ago	1M Delta	3M Delta	6M Delta	12M Delta
S&P 500	7,580.06	7,209.01	6,878.88	6,849.09	5,911.69	5.15%	10.19%	10.67%	28.22%
S&P/TSX Composite	34,769.14	33,964.33	34,339.99	31,382.78	26,175.05	2.37%	1.25%	10.79%	32.83%
5Y US Gov Bond Yield	4.13	4.02	3.51	3.59	3.96	11 bps	62 bps	54 bps	17 bps
5Y Canadian Gov Bond Yield	3.05	3.19	2.67	2.73	2.80	(14 bps)	39 bps	32 bps	25 bps
10Y US Gov Bond Yield	4.45	4.40	3.97	4.02	4.41	5 bps	48 bps	43 bps	4 bps
10Y Canadian Gov Bond Yield	3.41	3.54	3.13	3.15	3.20	(13 bps)	29 bps	26 bps	22 bps
30Y US Gov Bond Yield	4.99	4.98	4.64	4.67	4.92	1 bps	35 bps	32 bps	7 bps
30Y Canadian Gov Bond Yield	3.80	3.93	3.63	3.60	3.48	(13 bps)	17 bps	20 bps	33 bps
US Bond Yield Curve (3m -10y)	0.76	0.72	0.30	0.14	0.05	4 bps	46 bps	62 bps	71 bps
US High Yield (Option Adjusted Spread)	2.74	2.83	3.12	2.92	3.32	(9 bps)	(38 bps)	(18 bps)	(58 bps)
USD/CAD	\$1.38	\$1.36	\$1.36	\$1.40	\$1.37	1.58%	1.11%	(1.27%)	0.41%
USD/Euro	€ 0.86	€ 0.85	€ 0.85	€ 0.86	€ 0.88	0.62%	1.32%	(0.54%)	(2.67%)
USD/Yen	¥159.36	¥156.58	¥156.06	¥156.18	¥144.06	1.78%	2.11%	2.04%	10.62%
Gold	\$4,570.70	\$4,629.60	\$5,247.90	\$4,202.30	\$3,343.90	(1.27%)	(12.90%)	8.77%	36.69%
Oil (WTI)	\$87.36	\$105.07	\$67.02	\$58.55	\$60.79	(16.86%)	30.35%	49.21%	43.71%
CBOE Volatility Index (VIX)	15.32	16.89	19.86	16.35	18.57	(9.30%)	(22.86%)	(6.30%)	(17.50%)

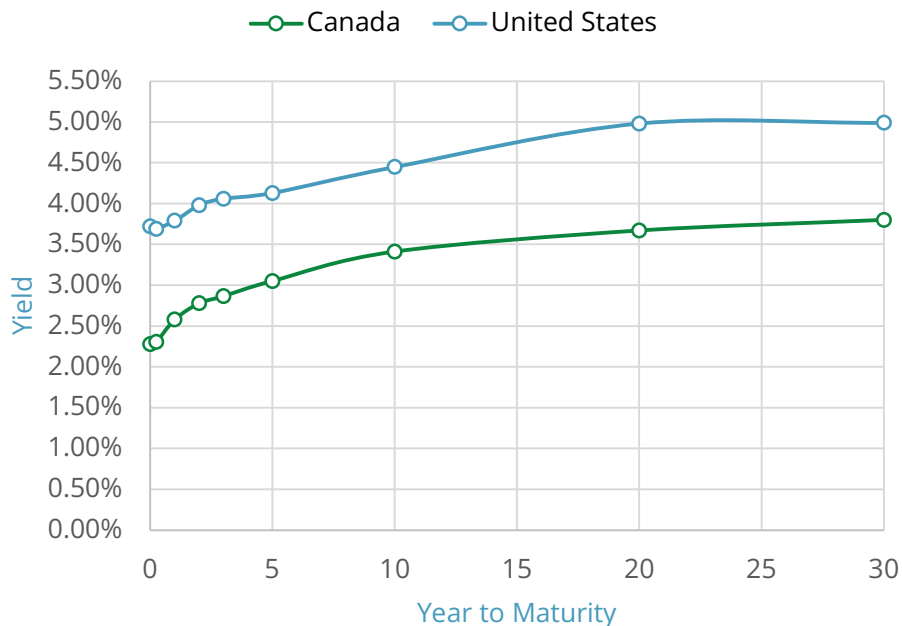
Source and Notes:

FLARE™ by Anchor Pacific Financial Risk Labs Ltd., Yahoo Finance, QuoteMedia, Fundata Canada Inc., investing.com, US Department of the Treasury (<https://www.treasury.gov/resource-center/data-chart-center/interest-rates/>), and Federal Reserve Bank of St. Louis Economic Research (FRED) (<https://fred.stlouisfed.org/>)

Please see disclaimer for further details.

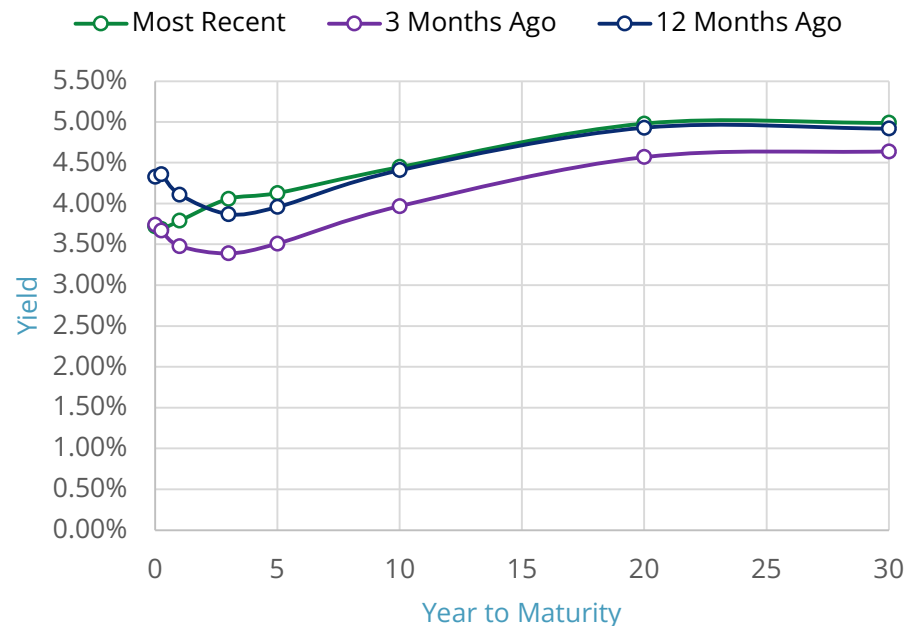
## Government Bond Yield Curves

As of May 31, 2026



## US Government Bond Yield Curves

Then and Now



**Source and Notes:**

Yield curves are calculated for Canada based on data provided by investing.com for 1 month, 3 months, 1 year, 3 years, 5 years, 10 years, 20 years, and 30 years.

Yield curves are calculated for the US based on data provided by the US Department of the Treasury's website (<https://www.treasury.gov/resource-center/data-chart-center/interest-rates/>) for 1 month, 3 months, 1 year, 3 years, 5 years, 10 years, 20 years, and 30 years.

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