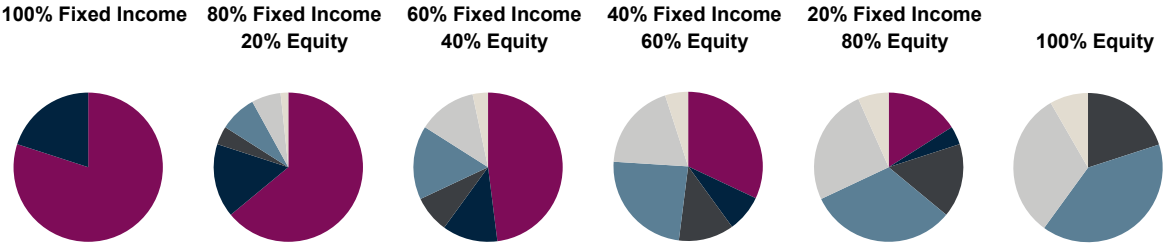
Learning From History

Blended Index Asset Allocations - September 2026

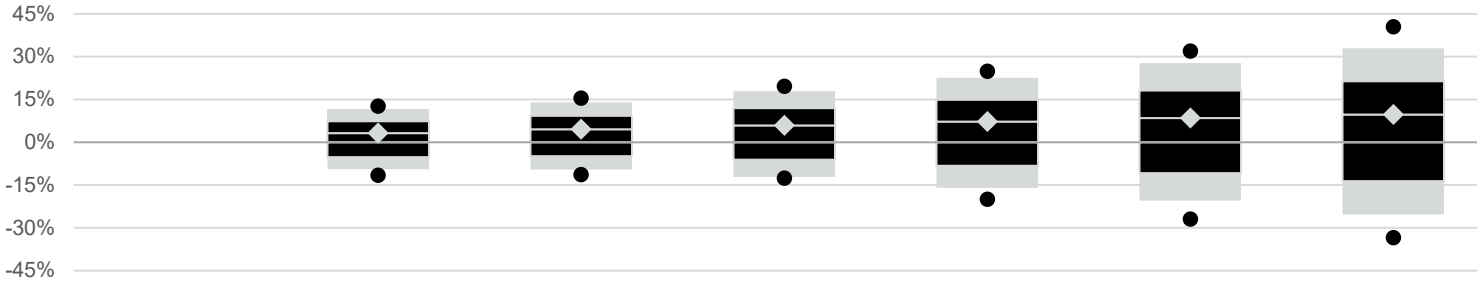
NOBELIA WEALTH
Daley Wealth Management



Historical Returns

1 Year	-1.35%	2.59%	6.65%	10.82%	15.16%	19.54%
3 Years	4.35%	7.97%	11.68%	15.49%	19.40%	23.37%
5 Years	0.11%	2.79%	5.51%	8.27%	11.06%	13.89%
10 Years	1.21%	3.52%	5.84%	8.17%	10.50%	12.83%
20 Years	3.19%	4.56%	5.89%	7.20%	8.47%	9.68%

Risks



The above shows the 20-year mean (diamonds), mean ±1 standard deviation (black), and mean ±2 strandard deviations (grey) for each portfolio. Dots represent the highest and lowest 1-year returns.

Annualized Volatility[1]	4.22%	4.72%	6.02%	7.73%	9.64%	11.64%
Highest 1-Year Return[2]	12.60%	15.45%	19.64%	24.81%	31.89%	40.47%
Lowest 1-Year Return[3]	-11.64%	-11.36%	-12.61%	-20.03%	-26.99%	-33.41%
Negative Years	1 in 13 years	1 in 9 years	1 in 4 years	1 in 4 years	1 in 4 years	1 in 4 years
Longest time to recover	6.17 years[4]	2.33 years	3.00 years	4.25 years	5.25 years	6.08 years

Notes:
Fixed Income: ● 80% FTSE Canada Universe Bond Index ● 20% Bloomberg Global Aggregate Bond Index (hedged to CAD)
Equity: ● 20% S&P/TSX Composite Index ● 40% Russell 3000 Index ● 31.67% MSCI EAFE IMI Index (net div.) ● 8.33% MSCI Emerging Markets IMI Index (net div.)
[1] 20-year standard deviation. [2] Highest 1-year return - 12 month period. [3] Lowest 1-year return - 12 month period.
[4] Ongoing (07/20-present) – 100% Fixed Income portfolio has not recovered to former peak level as of 09/26.
Historical returns are as of 09/30/2026. Time period for data: 02/01/1999 - 09/30/2026. Data Source: Dimensional Returns Web Canada.

Please note that past performance is not necessarily an indicator of future performance. Indices are not available for direct investment. The indicated rates of return are gross of fees and/or commissions. Individual results of client portfolios may differ from that of the representative portfolio as fees may differ, and performance of specific accounts is based on specific account investiture. The noted representative portfolios may not be appropriate for all investors.

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