

Key Investment Indices

As at March 2026

Atchison

	1 Month (%)	3 Months (%)	6 Months (%)	1 Year (%pa)	3 Years (%pa)	5 Years (%pa)	8 Years (%pa)	10 Years (%pa)
	Return (Cumulative)				Return (Annualised)			
Australian Equities								
ASX 20	-5.5	3.6	2.9	15.6	10.7	9.8	10.0	9.8
ASX 50	-7.1	-0.3	-1.8	10.4	9.0	8.7	9.0	9.1
ASX Small Cap	-10.2	-9.2	-7.8	14.6	9.4	6.5	8.0	9.3
ASX Mid Cap 50	-10.3	-9.6	-9.7	9.8	8.6	7.5	8.5	11.9
ASX 200	-7.2	-1.6	-2.6	11.7	9.5	8.6	8.9	9.3
ASX 300	-7.6	-2.4	-3.2	11.3	9.3	8.4	8.9	9.3
ASX Small Ords	-11.0	-11.0	-9.3	13.3	7.7	3.4	5.0	6.7
ASX 200 - A-REIT	-11.3	-16.7	-17.9	-2.5	7.8	4.6	5.6	5.0
ASX 200 - Financials	-6.5	0.8	-1.2	15.4	19.5	13.3	9.8	9.4
ASX 200 - Financials ex-A-REIT	-6.5	0.6	-1.4	15.5	19.6	13.4	9.9	9.6
ASX Tech	-11.2	-24.6	-39.6	-22.7	5.4	-0.3		
ASX 200 Resources	-7.7	9.8	21.6	46.6	9.9	13.0	13.6	16.4
Australia Ex-Financials and Resources	-6.4	-8.1	-14.3	-5.1				
Global Equities								
World Ex-Australia	-5.4	-8.4	-6.1	5.6	15.2	12.2	12.6	13.0
World Ex-Australia (Hedged)	-8.1	-5.5	-2.2	15.1	15.4	9.5	10.5	11.4
Global Top 100 Companies	-1.3	-7.0	-2.2	15.3	20.3	16.8	16.3	16.1
Global Value	-3.9	0.6	9.4	22.4	17.8	13.2		
Global Quality	-4.1	-6.3	-3.1	4.9	15.8	13.0	14.6	14.5
Global Mid-Caps	-1.5	-0.2	0.7	6.5	11.0	8.9	10.6	11.6
Global Small-Caps	-6.6	-3.3	-1.2	12.2	11.8	7.4		
Asia Ex-Japan	-9.3	-2.2	1.2	18.0	13.3	5.4	6.7	9.3
Emerging Markets	-9.6	-2.9	0.9	17.4	13.1	4.8	5.3	8.1
US Top 500	-1.2	-6.9	-5.1	6.9	17.2	14.2	15.1	15.2
US Top 500 (Hedged)	-5.2	-4.7	-2.2	16.5	16.5	10.0	11.4	12.3
Europe	-6.3	-5.5	-0.5	7.0	12.0	10.9	8.8	9.4
Japan	-8.9	-1.4	2.1	13.1	13.8	8.1	7.4	9.0
China Top 50	-2.4	-11.0	-16.9	-8.1	7.7	-1.4	0.1	3.8
Real Assets								
Australian Property	-10.6	-15.2	-14.8	2.3	7.7	4.9	6.6	6.0
Global Property (Hedged)	-7.3	1.8	1.1	6.3	5.7	1.3		
Global Infrastructure	1.0	7.0	5.9	6.0	10.2	9.3		
Fixed Interest (Domestic)								
Cash	0.3	0.9	1.9	3.9	4.2	2.9	2.2	
Australian Composite Bond	-1.4	-0.4	-1.5	1.4	2.0	0.0	1.4	1.7
Australian Treasury Bond	-1.4	-0.4	-1.8	0.8	1.1	-0.5	1.1	1.3
Australian Semi-Government Bond	-2.1	-0.6	-1.8	0.2	2.0	0.1	1.6	1.5
Australian Corporate Bond	-1.2	-0.2	-0.7	2.4	4.1	1.5		
Fixed Interest (Global)								
Global Aggregate Bond	-2.2	-0.7	0.0	2.6	2.6	-0.8	0.9	
Global Treasury Bond	-1.6	-0.2	0.5	2.7				
Global Corporate Bond	-2.1	-0.7	0.1	3.9	3.9	-0.2	1.6	2.0
Global High-Yield Bond	-1.8	-1.0	0.3	5.3	6.7	2.8	3.5	4.4
Multi Asset								
Conservative	-3.3	-1.7	-1.2	5.0	5.6	2.0	3.5	
Balanced	-4.5	-2.7	-2.0	6.7	7.5	3.6	5.1	
Growth	-5.5	-3.5	-2.6	8.2	9.5	5.7	7.0	
High Growth	-6.5	-4.3	-3.1	9.9	11.5	8.5	9.3	
AUD against								
US Dollar	4.1	-2.6	-3.2	-9.0	-0.7	2.2	1.4	1.2
Yen	2.1	-4.1	-10.2	-14.5	-6.5	-5.0	-3.6	-2.3
Euro	1.5	-4.5	-5.1	-3.0	1.2	1.7	0.6	1.3
Pound Sterling	2.1	-4.5	-5.2	-7.1	1.4	1.2	0.7	0.3
Chinese Renminbi	3.3	-1.5	-0.3	-4.5	-0.9	1.1	0.3	0.5
Resources								
Gold	-8.2	4.1	16.3	34.1	31.0	24.3	18.1	14.9
Silver	-16.0	-1.8	52.0	93.2	43.1	26.9	21.7	17.6
Oil	55.9	83.5	71.8	62.8	22.8	22.7	-0.4	2.6
Uranium	-9.3	7.7	-0.6	96.8	37.4			
Global Sectors and Themes								
Global Healthcare	-7.2	-3.4	7.2	2.3	4.5	5.3	7.6	
Biotech	4.3	1.9	23.4	43.1	17.6	0.8		
Semiconductors	-6.9	5.7	21.9	74.3	39.1			
Global Consumer Staples	-5.2	0.9	1.8	-3.0	4.1	7.3	7.4	6.7
Green Metal Miners	-11.3	4.9	26.9	88.3	12.8			
Global Technology	-1.8	-17.9	-20.3	-10.1	5.2	3.7	11.7	
Battery Tech & Lithium	-3.6	4.3	23.2	79.5	19.5	14.7		
Global Defence	-3.2	4.1	-1.8	32.4				
E-Sports and Gaming	-3.5	-20.4	-29.7	-4.8	16.0			
Global Robotics and Artificial Intelligence	-13.2	-12.3	-10.7	5.0	8.2	2.3		
Global Royalties	-5.1	8.5	5.5	22.2	17.5			
Digital Assets								
Bitcoin	5.8	-25.6	-42.9	-27.1	31.0			
Ethereum	10.5	-32.5	-51.9	1.9	2.5			