Key Investment Indices

As at July 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	3.7	5.6	9.9	11.7	12.6	9.2	9.6	9.7
ASX 50	3.1	3.9	4.8	5.6	10.3	8.2	8.5	8.8
ASX Small Cap	-1.0	0.3	-6.6	7.0	9.3	5.5	8.0	8.4
ASX Mid Cap 50	0.6	3.7	-4.6	1.8	7.7	6.7	8.5	9.2
ASX 200	2.2	4.1	2.8	5.9	10.3	7.9	8.5	8.9
ASX 300	2.1	4.0	1.5	4.9	9.9	7.6	8.4	8.8
ASX Small Ords	-3.9	-4.1	-14.1	0.8	6.4	1.5	4.1	5.2
ASX 200 - A-REIT	-0.1	1.9	-5.3	-8.0	8.9	4.7	5.6	4.6
ASX 200 - Financials	5.7	4.5	10.0	8.7	19.3	13.4	10.0	9.6
ASX 200 - Financials ex-A-REIT	5.8	3.6	8.8	7.5	19.1	13.3	10.0	9.6
ASX Tech	-3.4	6.0	-6.1	-31.0	5.0	1.4		
ASX 200 Resources	1.1	-0.1	3.1	43.6	10.8	10.5	11.8	14.7
Australia Ex-Financials and Resources	0.3	6.9	-2.1	-10.2				
Global Equities								
World Ex-Australia	-0.9	6.8	7.6	10.5	16.7	12.3	13.4	13.8
World Ex-Australia (Hedged)	0.3	5.2	8.6	20.4	17.7	11.0	11.7	12.5
Global Top 100 Companies	2.1	7.5	9.9	16.9	21.3	16.6	16.9	17.0
Global Value	1.2	20.5	28.7	52.8	25.5	18.1		
Global Quality	-1.9	6.0	4.8	9.3	14.9	11.2	14.8	15.0
Global Mid-Caps	-3.7	6.1	9.8	10.7	11.1	9.2	10.5	11.5
Global Small-Caps	-3.8	5.6	5.4	12.7	12.4	7.7		
Asia Ex-Japan	-4.5	7.8	11.0	24.0	17.7	8.8	9.0	10.2
Emerging Markets	-4.4	7.2	9.7	24.5	16.8	8.0	7.8	9.1
US Top 500	-1.2	6.6	8.2	9.4	17.4	13.6	15.3	15.7
US Top 500 (Hedged)	0.2	4.2	7.7	18.2	17.5	10.7	12.4	13.1
Europe	0.4	7.6	4.4	12.8	13.8	10.2	9.4	10.1
Japan	-0.4	8.0	9.2	21.3	15.3	10.2	8.8	9.4
China Top 50	13.4	3.2	-8.9	-9.4	7.2	0.9	0.6	3.4
Real Assets								
Australian Property	3.2	6.9	-1.7	0.2	9.6	5.6	6.6	5.7
Global Property (Hedged)	2.6	4.9	11.7	18.7	8.7	0.9		
Global Infrastructure	-0.9	0.9	7.1	5.8	9.6	7.6		
Fixed Interest (Domestic)								
Cash	0.4	1.2	2.1	4.0	4.3	3.3	2.4	
Australian Composite Bond	-0.4	2.1	1.6	1.0	3.6	-0.2	1.6	1.5
Australian Treasury Bond	-0.5	2.0	1.5	0.4	2.9	-0.8	1.2	1.1
Australian Semi-Government Bond	-0.3	0.3	-1.2	-1.9	2.7	0.0	1.5	1.5
Australian Corporate Bond	-0.1	2.3	1.9	2.4	5.1	1.6		
Fixed Interest (Global)								
Global Aggregate Bond	-1.1	0.0	-0.4	1.8	3.0	-1.2	0.9	
Global Treasury Bond	-1.0	-0.1	-0.1	2.2				
Global Corporate Bond	-1.2	0.0	-0.5	2.4	4.2	-0.7	1.7	1.6
Global High-Yield Bond	-0.2	1.0	1.1	4.4	7.0	2.9	3.6	4.1
Multi Asset								
Conservative	-0.5	2.1	0.0	2.6	5.8	2.3	3.4	
Balanced	-0.5	3.0	3.1	6.5	8.6	4.5	5.4	
Growth	-0.3	3.9	2.8	7.0	10.3	6.3	7.1	
High Growth	-0.1	4.9	4.3	9.4	12.6	8.5	9.6	
AUD against								
US Dollar	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Yen	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Euro	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Pound Sterling	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Chinese Renminbi	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Resources								
Gold	-1.3	-10.6	-19.5	11.5	24.7	17.8	16.5	12.1
Silver	-2.9	-19.5	-44.2	45.9	31.0	18.3	18.2	11.5
Oil	22.7	-13.2	55.8	53.3	18.1	16.5	-1.8	2.3
Uranium	-17.7	-33.2	-35.3	-12.4	19.8			
Global Sectors and Themes								
Global Healthcare	1.5	8.0	2.1	20.8	5.7	4.2	7.1	
Biotech	-8.4	14.6	17.5	57.4	18.5	4.3		
Semiconductors	-26.1	8.3	32.7	92.3	47.3			
Global Consumer Staples	1.1	4.2	2.4	1.5	4.5	5.4	6.9	6.3
Green Metal Miners	-15.3	-19.7	-20.3	37.4	7.6			
Global Technology	-5.3	24.1	24.5	6.5	13.0	8.5	14.7	
Battery Tech & Lithium	-23.4	-29.1	-14.6	25.9	9.9	8.8		
Global Defence	2.7	-0.1	-11.0	-1.3				
E-Sports and Gaming	6.0	4.2	-11.9	-21.2	14.3			
Global Robotics and Artificial Intelligence	-6.9	-4.5	-4.9	-2.3	5.7	2.2		
Global Royalties	-10.0	0.2	3.4	15.6	17.6			
Digital Assets								
Bitcoin	5.1	-16.1	-24.7	-51.5	26.2			
Ethereum	17.0	-15.8	-32.1	-54.9	-2.1			

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