

Creative Planning Periodic Table of Style Rotation



This style rotation table compares the returns of various indices. Fluctuations in market cycles demonstrate the importance of diversification. Diversification does not assure a profit nor does it protect against loss of principal. As with any investment, it is possible to lose money. The returns include dividend reinvestments but exclude the impact of management fees and trading costs. Past performance is no assurance of future performance.

2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024 YTD
Real Estate 32.00%	Real Estate 4.48%	Precious Metals 56.29%	Emerging Market Stocks 36.83%	Bonds 0.01%	Large Cap Stocks 31.49%	Precious Metals 24.50%	Real Estate 45.91%	Precious Metals 7.15%	Large Cap Stocks 26.29%	Large Cap Stocks 22.08%
Large Cap Stocks 13.69%	Large Cap Stocks 1.38%	Small Cap Stocks 21.31%	Precious Metals 32.83%	Real Estate -4.22%	Mid Cap Stocks 30.54%	Small Cap Stocks 20.27%	Large Cap Stocks 28.71%	Bonds -13.01%	International Stocks 18.24%	Emerging Markets Stocks 16.26%
Mid Cap Stocks 13.22%	Bonds 0.55%	Mid Cap Stocks 13.80%	International Stocks 25.03%	Large Cap Stocks -4.38%	Small Cap Stocks 25.52%	Large Cap Stocks 18.40%	Mid Cap Stocks 22.58%	International Stocks -14.45%	Mid Cap Stocks 17.23%	Real Estate 14.92%
Bonds 5.97%	International Stocks -0.81%	Large Cap Stocks 11.96%	Large Cap Stocks 21.83%	Mid Cap Stocks -9.06%	Real Estate 23.10%	Emerging Markets Stocks 18.39%	Small Cap Stocks 14.82%	Mid Cap Stocks -17.32%	Small Cap Stocks 16.93%	Mid Cap Stocks 14.63%
Small Cap Stocks 4.89%	Mid Cap Stocks -2.44%	Emerging Market Stocks 9.90%	Mid Cap Stocks 18.52%	Small Cap Stocks -11.01%	Precious Metals 22.72%	Mid Cap Stocks 16.70%	Precious Metals 14.33%	Large Cap Stocks -18.11%	Real Estate 13.96%	International Stocks 12.99%
Emerging Markets Stocks -1.79%	Small Cap Stocks -4.41%	Real Estate 6.68%	Small Cap Stocks 14.65%	International Stocks -13.79%	International Stocks 22.01%	International Stocks 7.82%	International Stocks 11.26%	Emerging Markets Stocks -19.83%	Emerging Markets Stocks 11.67%	Small Cap Stocks 11.17%
International Stocks -4.90%	Emerging Markets Stocks -13.86%	Bonds 2.65%	Real Estate 3.76%	Precious Metals -14.99%	Emerging Markets Stocks 17.65%	Bonds 7.51%	Emerging Markets Stocks -0.28%	Small Cap Stocks -20.44%	Precious Metals 9.13%	Precious Metals 7.41%
Precious Metals -17.72%	Precious Metals -39.43%	International Stocks 1.00%	Bonds 3.545	Emerging Markets Stocks -15.05%	Bonds 8.72%	Real Estate -11.20%	Bonds -1.54%	Real Estate -25.96%	Bonds 5.53%	Bonds 4.45%

Large Cap Stocks are represented by the S&P 500 Index, which measures the performance of the large-cap segment of the U.S. equity universe.

Mid Cap Stocks are represented by the Russell Midcap Index, which measures the performance of the mid-cap segment of the U.S. equity universe.

Small Cap Stocks are represented by the Russell 2000 Index, which measures the performance of the small-cap segment of the U.S. equity universe. It includes approximately 2,000 of the smallest securities based on a combination of their market cap and current index membership.

International Stocks are represented by the MSCI EAFE Index (Europe, Australasia, and Far East), which is a widely followed index of common stocks from 22 developed market countries.

Emerging Markets are represented by the MSCI Emerging Markets Index, which measures the performance of stocks in emerging market countries.

Precious Metals is represented by the MSCI World/Metals & Mining (TR Net) Index which measures the performance of U.S. stocks of companies engaged in the exploration and production of gold, silver and platinum-group metals. At Creative, we do not recommend precious metals as an investment. The asset class has historically delivered the worst of both worlds: high volatility and very low returns. No thanks. We include this asset class on the Creative Planning Periodic Table only because it is a major asset class and often covered by the media and discussed with clients.

Bonds are represented by the Bloomberg U.S. Aggregate Bond Index, which covers the USD-denominated, investment-grade, fixed-rate, taxable bond market. The index includes government and corporate securities, mortgage-backed securities, and asset-backed securities, with maturities of at least one year.

Real Estate is represented by the Dow Jones U.S. Select REIT Index, which measures the performance of U.S. publicly traded Real Estate Investment Trusts.

An **ETF** or mutual fund's portfolio may differ significantly from the securities held in the indices. These indices are not available for direct investment; therefore, their performance does not reflect the expenses associated with the active management of an actual portfolio.

*As of 9/30/2024