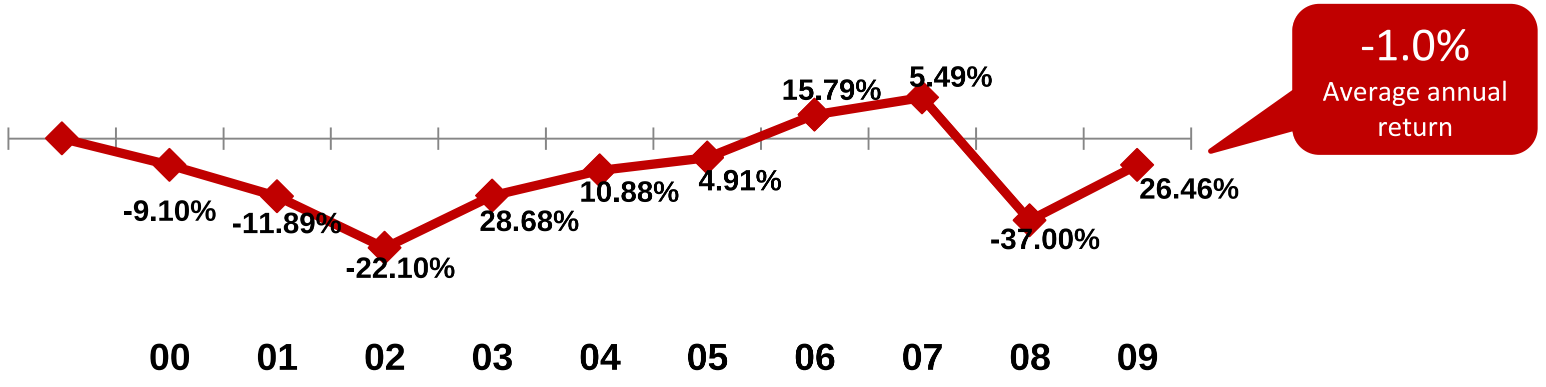
The Worst Decade in S&P® History

The S&P 500® introduced its first stock index in 1923[1]. Since that time, the worst decade of S&P 500® performance occurred from 2000-2009. This decade included not one but two bear markets, and represented the first decade the S&P 500®, on average, lost money – Its stocks, on average, returned -1%[2].

For this reason, 2000-2009 is a good example of how a savings strategy could potentially perform in a poor market[3].

To truly "stress test" a savings strategy, we must take it one step further. The bear markets of 2000-2009 were followed by a strong bull market[2]. However, we want to exclude that strong recovery. We want to see how a savings strategy could perform if the worst decade in S&P® history repeated itself… over and over again.[3]



Annual return of the S&P 500® including dividends.

[1] Google Finance, November 2017

[2] Yahoo! Finance, GSPC Annual Returns, January 2017

[3] This historical performance of the S&P 500 is not intended as an indications of its future performance and is not guaranteed. This chart is not intended to provide investment, tax or legal advice. Be sure to consult a qualified professional about your individual situation. This chart does not take into account investment fees, so actual results may be different than depicted above. This information is not intended to offer legal or investment advise. Please consult a qualified professional about your individual situation.

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