

## **S&P 500 Benchmarked Assets Reach \$7.8 Trillion; \$3.05 Trillion Invested in Products Indexed to S&P DJI Indices**

*Explosive Year-over-Year AUM Growth in Products Based on S&P DJI Smart Beta Indices*

**New York, June 4, 2015:** S&P Dow Jones Indices (“S&P DJI”), one of the world’s leading index providers, announced today that it has published its annual survey of indexed assets. According to the survey, approximately **\$7.8 trillion is now benchmarked to the iconic S&P 500® with \$2.16 trillion of that figure directly indexed** via exchange traded funds (ETFs), mutual funds, and other investment product structures.

All data in this press release are as of year-end 2014, unless otherwise noted. **To view the complete survey, please click [here](#).**

### **Additional Survey Highlights**

- Approximately \$3.05 trillion is now directly invested in products based upon all equity and fixed income indices calculated and published by S&P DJI.
- Significant AUM growth seen in products based upon S&P DJI Smart Beta Indices (+55% year-over-year growth to \$133.64 billion)
- ETF assets grew 24% year-over-year, driven by strong flows into US equities.
- Nearly \$30 billion in assets are directly indexed to S&P DJI’s fixed income indices.

“With \$7.8 trillion in assets now benchmarked, the S&P 500 has clearly made its mark as the premier measure of U.S. stock market performance for investors throughout the world,” says **Alex Matturri, CEO of S&P Dow Jones Indices**. “Investor interest in index products based upon S&P DJI indices continues to grow and be met by our leading family of U.S. stock market indices and increasingly by our growing family of fixed income indices.”

“While market cap weighted indices remain at the core of our offerings, we are now seeing strong growth in smart beta based index strategies amongst all of our client segments throughout the world,” continues Matturri. “Last year, we launched 89 smart beta indices to meet the growing needs of investors which resulted in a 55% year-over-year increase in indexed smart beta AUM. We expect investor appetite for innovative smart beta indices to proliferate over the next several years, and remain committed to increasing our offerings across all asset classes throughout the world.”

### **Other Highlights**

- As of May 29, 2015, 623 ETFs are based upon S&P DJI indices with approximately \$828 billion in AUM.
  - More ETF assets are based upon indices calculated and published by S&P DJI than any other index provider in the world.
- 3 of the top 4 ETFs in Europe, as determined by AUM, are based on the S&P 500
- According to the FIA, as of March 2015, 3 of the top 5 Equity Index Futures & Options Contracts Traded Globally are based on S&P DJI indices.
  - More futures and options contracts are traded globally on S&P DJI indices than any other index provider.

To view the S&P DJI annual survey, please visit: [www.spdji.com](http://www.spdji.com).

**About S&P Dow Jones Indices**

S&P Dow Jones Indices LLC, a part of McGraw Hill Financial, is the world's largest, global resource for index-based concepts, data and research. Home to iconic financial market indicators, such as the S&P 500® and the Dow Jones Industrial Average®, S&P Dow Jones Indices LLC has over 115 years of experience constructing innovative and transparent solutions that fulfill the needs of investors. More assets are invested in products based upon our indices than any other provider in the world. With over 1,000,000 indices covering a wide range of asset classes across the globe, S&P Dow Jones Indices LLC defines the way investors measure and trade the markets. To learn more about our company, please visit [www.spdji.com](http://www.spdji.com).

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