

Stocks, Bonds, Bills, and Inflation® Data License

Benchmarks since 1926

- ▶ IA S&P 500
- ▶ U.S. Small-Cap stocks
- ▶ U.S. Long-Term Government Bonds
- ▶ U.S. Long-Term Corporate Bonds
- ▶ Domestic High Yield Corporate Bonds
- ▶ U.S. Intermediate-Term Bonds
- ▶ U.S. Inflation
- ▶ U.S. 30-day Treasury Bill

Benchmarks since 1969

- ▶ IA Large-Cap Growth
- ▶ IA Large-Cap Value
- ▶ IA Mid-Cap Growth
- ▶ IA Mid-Cap Value
- ▶ IA Small-Cap Growth
- ▶ IA Small-Cap Value
- ▶ IA All-Cap Growth
- ▶ IA All-Cap Value
- ▶ Gold
- ▶ U.S. 1-year Treasury—Constant Maturity (since 1953)

Data Points

- ▶ Total Return
- ▶ Capital Appreciation
- ▶ Income Return

In 1976, Roger Ibbotson, then a professor at the University of Chicago, published his influential study analyzing the long-term returns of the principal asset classes in the U.S. economy. This study, known as Stocks, Bonds, Bills, and Inflation® (SBBI®), provided historical returns dating back to 1926. This information proved useful to advisors and institutions, so shortly thereafter Ibbotson Associates was founded. Morningstar, with its acquisition of Ibbotson Associates, now offers this data, which has been enhanced to include additional benchmarks.

Original Source Offers Unsurpassed Information

SBBI data is known as the industry standard for complete, timely asset class information. It is the source for the Stocks, Bonds, Bills, and Inflation Yearbook and SBBI Select Charts, which are utilized by thousands of financial advisors and investment professionals.

The SBBI Data License provides monthly total return data for 18 asset classes and, where applicable, the breakdown between capital appreciation and income.

Historical View Boosts Marketing and Analysis

With 80 years of asset class information, the SBBI Data License brings an objective, independent historical perspective to investor and advisor communications. Create materials that depict nearly any market condition—the widespread recognition of Ibbotson

SBBI information ensures that most advisors will be familiar with the source. The unparalleled data history found in the SBBI Data also enables extensive market analysis.

Information Adds Impact to Communications

SBBI data is ideal for communicating market concepts to advisors and investors in newsletters, articles, and on Web sites, and for supporting internal research efforts. This data is also available in EnCorr®—investment analysis software for developing, analyzing, and implementing optimal asset allocation strategies. Create images in EnCorr for a range of marketing and sales initiatives—from advertising and client education materials to brochures and advisor presentations.

Availability Options Provide Flexibility

The SBBI Data License is delivered monthly in a Microsoft Excel spreadsheet. The data—along with information on other investments—is also available in Morningstar's EnCorr software.

Learn More

Contact us today to integrate SBBI data into your business operations.
Call us at +1 888 736-0780
Visit us at <http://global.morningstar.com/LicensedData>

Stocks, Bonds, Bills, and Inflation Chart

Year end 1925–2006.

Hypothetical value of \$1 invested at year-end 1925. Assumes reinvestment of income and no transaction costs or taxes.

