Bond fund performance year to date

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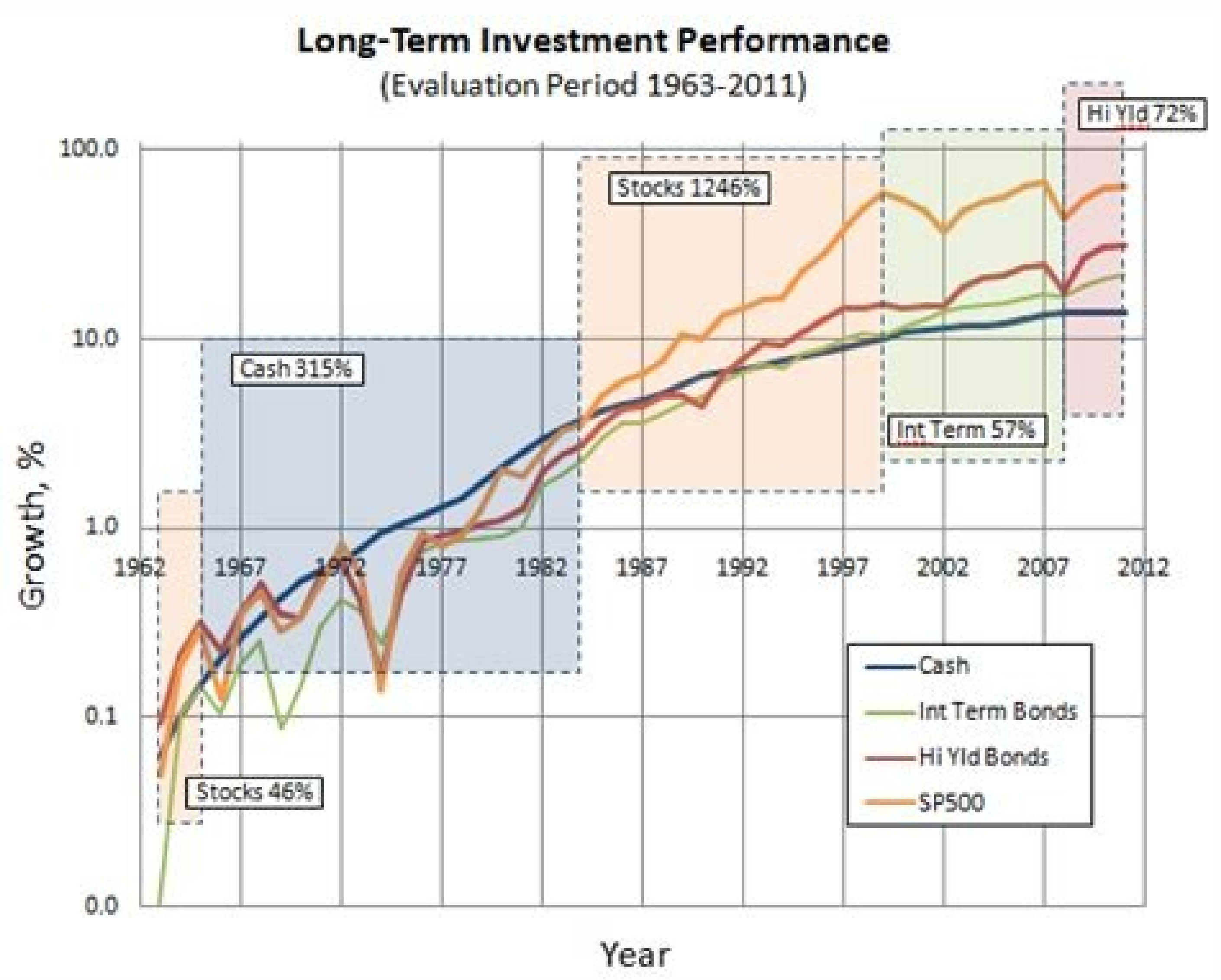

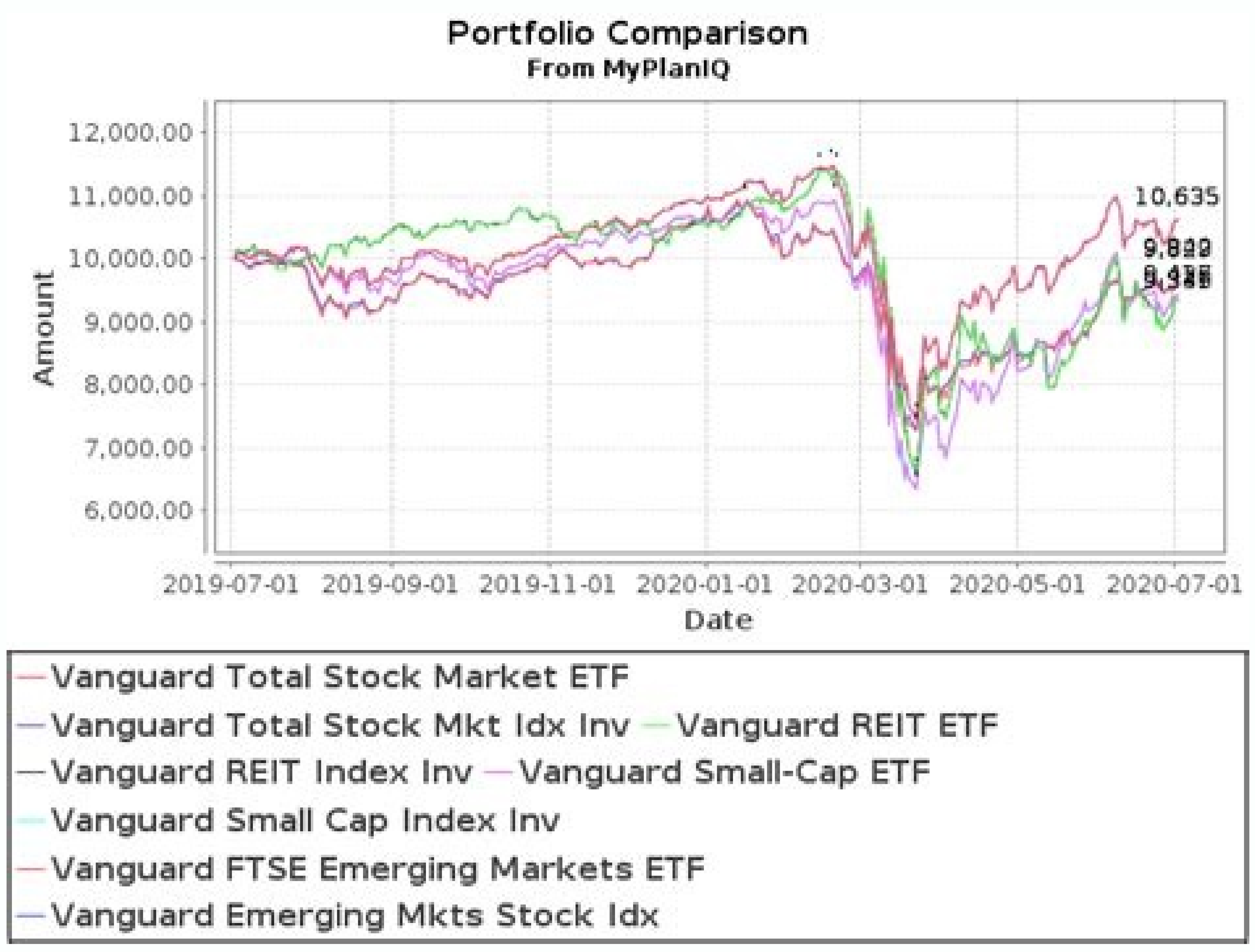

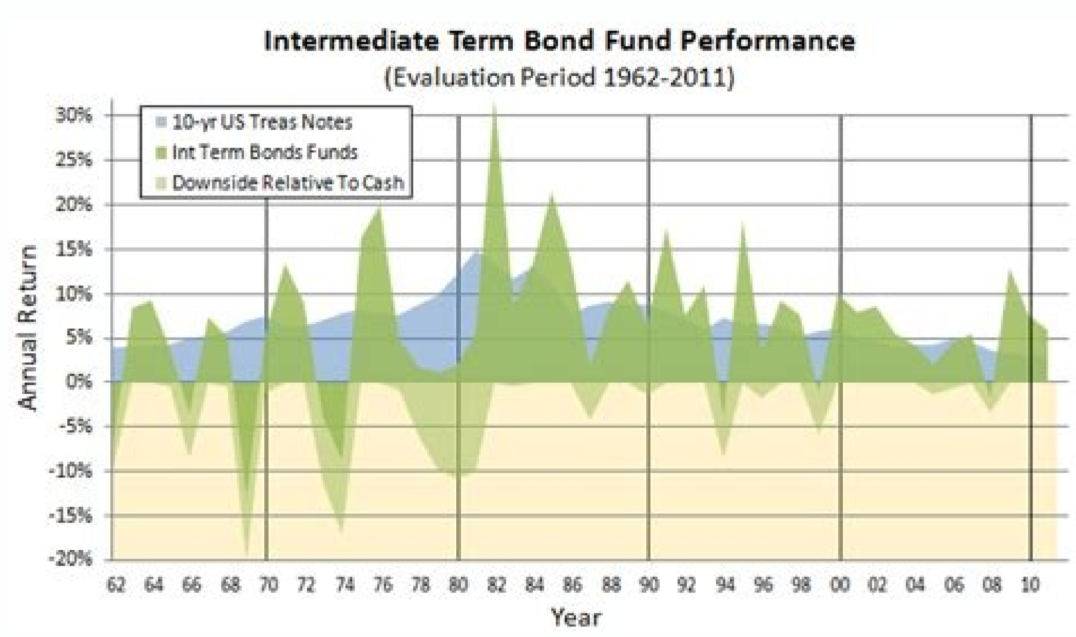

How long does it take to get a performance bond. Best performing bond funds ytd.

To calculate the year-to-date (YTD) return on a portfolio, subtract the starting value from the current value and divide it by the starting value. Multiply by 100 to convert this figure into a percentage, which is more useful than the decimal format for comparisons of the returns of individual investments. YTD return is the amount of profit (or loss) realized by an investment since the first trading day of the current calendar year.YTD return is a commonly used number for the comparison of assets or for tracking portfolio performance.To calculate YTD, subtract the starting year value from the current value, divide the result by the starting-year value; multiply by 100 to convert to a percentage.Although year-to-date (YTD) return on a portfolio is helpful, analyzing the three-year and five-year returns can provide a better sense of the trend.The YTD return can be helpful when assessing the performance of a portfolio or security against others or a benchmark, such as the S&P 500 index. YTD return is the amount of profit (or loss) realized by an investment since the first trading day of the current calendar year. YTD calculations are commonly used by investors and analysts to assess the performance of a portfolio or to compare the recent performance of a number of stocks. The YTD return can be helpful when assessing the performance of a portfolio or security against others or a benchmark. For example, an equity portfolio that has generated a 5% return may appear by itself to be impressive. However, if an equity benchmark such as the S&P 500 index earned 10% YTD, the portfolio's 5% YTD return would be underperforming the overall market. As a result, it helps to compare YTD returns to like assets, such as a bond portfolio to a bond fund. Also, some portfolios might be heavily invested in one sector, such as technology. To gauge performance, investors can compare their tech portfolio's YTD return to a technology exchange-traded fund (ETD). YTD measurement is important, but keep in mind that the information it conveys is limited and may place too much emphasis on short-term performance. Also, YTD return analysis may not account for the seasonality of revenue and earnings. For example, the retail sector earns much of its revenue in Q4 during the holidays. Analyzing the YTD return of a retailer earlier in the year might appear that the company is underperforming versus non-retail companies.

However, the retailer might outperform other companies by the end of the year if its holiday sales were significant. Although YTD return analysis helps allow investors to pivot by adjusting their portfolio's asset allocation, it's also important to consider longer time frames. For example, analyzing three-year and five-year returns can help get past short-term trends to determine how a portfolio, stock, or index is performing over time. YTD return can have the starting point at the beginning of the calendar year or fiscal year. While the calendar year starts on Jan. 1, a company's fiscal year is the start of the accounting year and can vary. For example, Apple's 2021 fiscal year ended on Sept. 25, 2021. Calculating the YTD return of an entire portfolio is the same as for a single investment. Below are the steps to calculate YTD return: Step 1: Obtain the portfolio's current value and its beginning value at the start of the year. Step 2: Subtract the portfolio's value at the start of the year, such as Jan. 1, from the portfolio's current value. The result is the YTD return in dollars. Step 3: Divide the dollar value of the YTD return by the portfolio's beginning value. Step 4: Multiply the result in step three by 100 to convert the decimal figure into a percentage. The result is the percentage YTD return of a portfolio. The year to date return formula is as follows: Year to date = ((Current value - Beginning value) / Beginning value) * 100 Assume that on Jan. 1 of this year a stock portfolio had a value of $50,000 that consisted of three stocks listed below: Stock A: $10,000Stock B: $15,000Stock C: $25,000 Portfolio value: $50,000 at the start of the year On June 30th, a YTD return analysis was performed to determine how the equity portfolio was performing at the year's halfway mark. Stock A: $13,000Stock B: $18,000Stock C: $24,000 Portfolio value: $55,000 on June 30 Portfolio's YTD Return: ($55,000 - $50,000) / $50,000 = .010 * 100 = 10% The YTD return in dollars was $5,000 (or $55,000 - $50,000) and represented as a percentage was a 10% return YTD. It's important to note that portfolio weighting must also be considered when investing. For example, if a portfolio has more than 50% of its money invested in one stock or sector, the portfolio's return will likely be impacted more so by the higher-weighted holdings versus the lower-weighted holdings. If an investment paid interest or dividends during the year, the amount must be included in the current value of the portfolio since it counts as a portion of the gain. The YTD return would then be calculated as follows: Portfolio YTD Return: ($55,500 - $50,000) / $50,000 = .011 * 100 = 11% As we can see, if a stock or investment pays a dividend or interest, it can help bolster a portfolio's YTD return. A good rate of return depends on how a portfolio compares to a similar benchmark. For example, a stock portfolio's YTD return might be impressive compared to a bond fund, but it's more helpful to compare it to an equity benchmark like the S&P 500. A high YTD return means that the portfolio is generating an increase in value when compared to the start of the year. Limitations to YTD return analysis include the seasonality of earnings. For example, retail companies that earn much of their revenue in Q4 during the holidays might have an underperforming YTD return in June but outperform by the end of the year. Morningstar Return RatingN/A15-Year Average Return2.13%Best 1 Yr Total Return (Feb 3, 2019)8.61%Worst 1 Yr Total Return (Feb 3, 2019)-2.26%Best 3-Yr Total Return8.61%Worst 3-Yr Total Return1.21%Last Bull Market2.32%3.52%Last Bear Market4.93%3.25%2021-3.64%1.97%0.08%-0.11%2018-1.50%-0.20%0.00%1.59%20163.06%2.34%0.39%-3.19%20151.62%-1.81%1.16%-0.63%2013-0.09%-2.45%0.51%-0.22%20101.69%3.58%2.42%-1.35%20082.18%-1.09%-0.41%4.37%20071.44%-0.66%2.93%3.08%2006-0.73%-0.20%3.85%1.35%2005-0.47%2.99%-0.75%0.65%20042.71%-2.49%3.09%0.95%20031.30%2.57%-0.12%0.18%20013.24%0.79%4.29%-0.08%1999-0.43%-0.98%0.79%-0.13%1997-0.62%3.56%3.40%2.83%1996-1.90%0.60%1.79%3.12%1994-2.71%-1.01%0.52%0.55%19934.17%2.70%2.72%-0.19%1992-1.27%3.91%4.21%0.22%1990-1.08%3.56%0.76%5.26%19871.19%-2.21%-3.12%5.91% FEATURED PARTNER OFFER *All data is sourced from Morningstar and is current as of March 1, 2022. Our methodology focused on over two dozen index funds that seek to track the broad U.S. bond market. We excluded from consideration funds that didn't cover the entire market, such as speciality bond funds invested chiefly or exclusively in Treasury Inflation-Protected Securities (TIPS), high-yield corporate bonds or municipal bonds. We also excluded actively managed bond funds. In evaluating broad market bond index funds, we considered several factors. Using data provided by Morningstar and fund management companies, we evaluated each candidate fund's five-year returns, expense ratio and tracked index. Many broad market bond funds track the Bloomberg Barclays U.S. Aggregate Bond Index, and we felt it was important to include funds that track other indexes, so long as they met the criteria mentioned above. The difference in these variations is particularly important with the Bloomberg Barclays U.S. Universal Bond Index. As highlighted above in the Fidelity Total Bond Fund, the fund's five-year return is significantly higher than the other options in our list, in large part because it takes on more credit risk. Finally, we considered each fund's yield over the last 12 months, the so-called trailing 12-month yield, or TTM. A fund's TTM yield gives investors a glimpse into the current bond market, something that a five- or ten-year return measure can obscure. On the surface, it can be hard to distinguish one total bond market index fund from another. For instance, most of the funds on our list track the Bloomberg Barclays US Aggregate Bond Index. That's no accident, since it's considered the main benchmark index for the U.S. bond market, covering all major types of fixed income. On closer examination, important differences emerge. First and foremost are costs—choosing an index fund with the lowest possible fees ensures that more money stays in your pocket over the life of an investment. The funds we list here range in price from 2.5 basis points to 45 basis points. Then there are total bond market funds that track other indexes, like the U.S. Universal Index. This alternative index adds high-yield and emerging markets bonds to the mix, offering higher returns in exchange for more cost and somewhat higher risk. Index fund investing benefits from lower fees than buying actively managed mutual funds. Lower costs result in better after-fee returns over the long term. That's true with fixed income investments as well as equities. SP Global tracks the relative performance of actively managed funds compared to their respective benchmark across a number of asset classes. Its latest report shows that actively managed funds were more likely to underperform their respective index over one-, three- and five-year periods. Morningstar has reported similar results. There are at least two important considerations beyond performance that investors should keep in mind. First, the duration of the funds in our list hover around six years. Duration helps us understand how much the value of a fund will rise or fall with interest rates. Generally, for each 1% rise or fall in interest rates, a fund's value will rise or fall by a percentage equal to its duration. Assuming a fund with a six-year duration, an increase in rates of 1% will cause the fund's value to decline by about 6%. A decrease of 1% in the prevailing rates will cause the fund's value to increase by about 6%. Given the historically low interest rate environment and the recent rise in yields, you need to consider the interest rate risk associated with a total bond index fund. Second, the Bloomberg Barclays bond index is limited to fixed-rate securities. As a result, the index and the funds that track it do not invest in TIPS, which protect investors from unexpected rises in inflation and interest rates. TIPS are an important part of a well diversified portfolio—for investors wanting exposure to TIPS, they'll need to consider other bond funds. Information provided on Forbes Advisor is for educational purposes only. Your financial situation is unique and the products and services we review may not be right for your circumstances. We do not offer financial advice, advisory or brokerage services, nor do we recommend or advise individuals or to buy or sell particular stocks or securities. Performance information may have changed since the time of publication. Past performance is not indicative of future results. Forbes Advisor adheres to strict editorial integrity standards. To the best of our knowledge, all content is accurate as of the date posted, though offers contained herein may no longer be available. The opinions expressed are the author's alone and have not been provided, approved, or otherwise endorsed by our partners. Was this article helpful?

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