

| Fund/Asset Class | Assets (BB) | 2004 to 2023 | | 2000 to 2020 | | 1997 to 2023 | |
|------------------------------|-------------|--------------|--------|---------------|-------|---------------|-------|
| | | Amount | CAGR | Amount | CAGR | Amount | CAGR |
| VTI/VTSEX | | 6,303 | 9.64% | 4,095 | 6.95% | 10,416 | 9.07% |
| DODIX | 67.1 | 2,165 | 3.94% | 3,262 | 5.79% | 3,659 | 4.92% |
| AGG | 101.0 | 1,814 | 3.02% | Did Not Exist | | Did Not Exist | |
| BND/VBMFX | 104.7 | 1,821 | 3.04% | 2,751 | 4.94% | 2,920 | 4.05% |
| ABNFX/ABNDX | 80.2 | 1,714 | 2.73% | 2,564 | 4.59% | 2,729 | 3.79% |
| TLT | 49.5 | 2,198 | 4.02% | Did Not Exist | | Did Not Exist | |
| PTTAX | 53.3 | 2,009 | 3.55% | 3,141 | 5.60% | 3,341 | 4.57% |
| LONG TERM TREASURY | | 2,150 | 3.90% | 4,654 | 7.60% | 3,783 | 5.05% |
| 60/40 VTI/DODIX | | 4,363 | 7.64% | 4,050 | 6.89% | 7,713 | 7.86% |
| 60/40 VTI/AGG | | 4,149 | 7.37% | Did Not Exist | | Did Not Exist | |
| 60/40 VTI/BND | | 4,135 | 7.36% | 3,834 | 6.61% | 7,031 | 7.49% |
| 60/40 VTI/ABNFX | | 3,941 | 7.10% | 3,612 | 6.31% | 6,629 | 7.26% |
| 60/40 VTI/TLT | | 4,848 | 8.21% | Did Not Exist | | Did Not Exist | |
| 60/40 VTI/PTTAX | | 4,275 | 7.53% | 4,025 | 6.86% | 7,381 | 7.68% |
| 60/40 VTI/LONG TERM TREASURY | | 4,654 | 7.99% | 5,012 | 7.98% | 8,317 | 8.16% |
| | | | | | | | |
| | | 1987 to 2023 | | 2000 to 2023 | | | |
| US TOTAL | | 39,533 | 10.45% | 5,210 | 7.12% | | |
| LONG TERM TREASURY | | 8,795 | 6.05% | 3,216 | 4.99% | -11.59% CAGR | |
| 60/40 | | 19,382 | 8.34% | 5,072 | 7.00% | | |
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<https://www.forbes.com/sites/investor-hub/2024/01/10/best-bond-funds-2024/?sh=6e3c295d9424>