Index factsheet

Russell 2500 Index

FTSE RUSSELL
An LSEG Business

About the index

The Russell 2500™ Index measures the performance of the mid to small cap ("SMID" cap) segment of the US equity market. The index includes approximately 2500 of the smallest US companies in the Russell 3000® Index, which was designed to represent approximately 98% of the investable US equity market, based on a combination of their market cap and current index membership. Semi-annual reconstitution and quarterly IPO inclusions ensure newly eligible companies are represented and that larger stocks do not distort the performance and characteristics of the true US SMID cap opportunity set.

Index characteristics

(As of 9/30/2026)

	Russell 2500™	Russell 3000®
Price/Book	2.47	5.00
Dividend Yield	1.43	1.11
P/E Ex-Neg Earnings	18.23	23.93
EPS Growth - 5 Years	7.95	15.37
Number of Holdings	2,486	2,996

Market capitalization (in billions USD)

(As of 9/30/2026)

	Russell 2500™	Russell 3000®
Average Market Cap ($-WTD)	$8.661	$1495.696
Median Market Cap	$1.704	$2.584
Largest Stock by Market Cap	$26.173	$5549.634

True representation of the US equity market

Objective construction methodology

Provides an unbiased, complete view of the US equity market and underlying market segments

Modular market segmentation

Distinct building blocks to provide insight into the current state of the market and inform asset allocation decisions

Reliable maintenance and governance

Disciplined, reliable maintenance process backed by a well-defined, balanced governance system ensures the indexes continue to accurately reflect the market

Tickers

Russell 2500™		
Bloomberg	PR	R2500
Reuters	PR	.R25I

For more information, including a list of ETFs based on FTSE Russell Indexes, please call us or visit lseg.com/ftse-russell

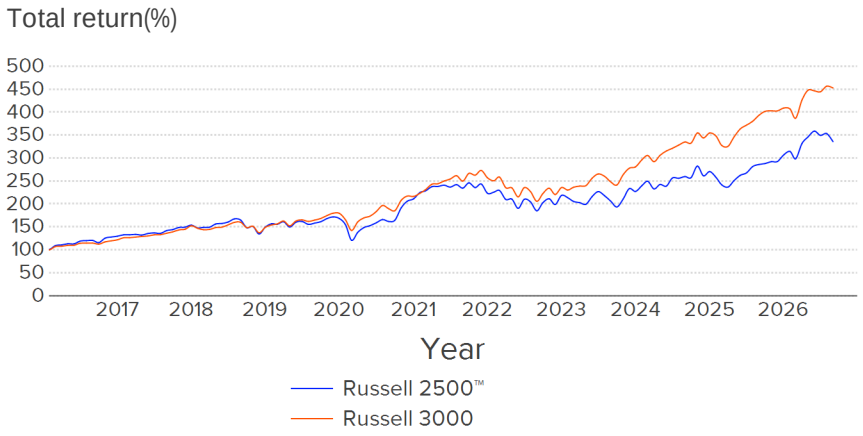
The launch date of the Russell 2500™ Index is June 1, 1990, and index history start date is December 31, 1978. The launch date of the Russell 3000® Index is January 1, 1984. All performance presented prior to the index launch date is back-tested performance. Please see disclaimer for important legal information.

Performance

	1 yr	3 yr	5 yr	10 yr	2021	2022	2023	2024	2025	2026
Russell 2500™	17.45	17.74	7.46	10.81	18.18	-18.37	17.42	12.00	11.91	14.90
Russell 3000	15.13	22.26	12.64	14.73	25.66	-19.21	25.96	23.81	17.15	12.42

Data as of September 30, 2026. Past performance is no guarantee of future results. Returns shown may reflect hypothetical historical performance. Please see the final page for important legal disclosures.

Total return



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Annualized risk - Standard Dev (%)

	1 yr	3 yr	5 yr	10 yr
Russell 2500™	14.98	17.33	19.26	19.50
Russell 3000	12.32	12.61	15.78	15.75

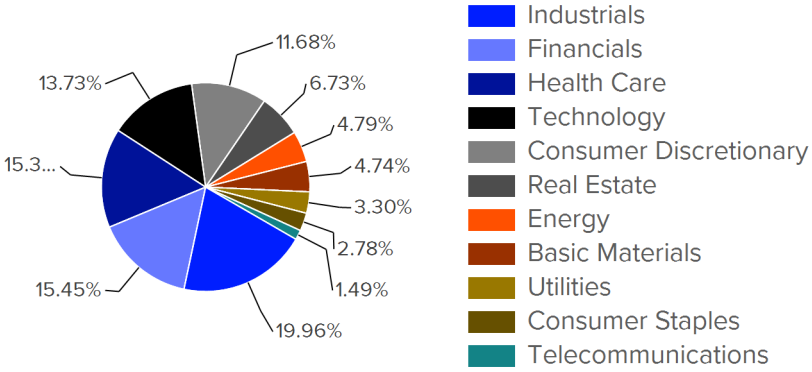
As of September 30, 2026

Sharpe Ratio

	1 yr	3 yr	5 yr	10 yr
Russell 2500™	0.90	0.77	0.27	0.50
Russell 3000	0.90	1.31	0.60	0.80

As of September 30, 2026

ICB Industry



As of September 30, 2026

Top ten index constituents

Company	Industry
Nvent Electric Plc	Industrials
Ati Inc	Industrials
F5 Inc	Technology
Guardant Health	Health Care
Viatris	Health Care
Tenet Healthcare Corp	Health Care
Us Foods Holding Corp	Consumer Staples
Royal Gold Inc	Basic Materials
Packaging Corp Of Amer	Industrials
Roku Inc	Telecommunications

As of September 30, 2026

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Market participants look to us for our expertise in developing and managing global index solutions across asset classes. Asset owners, asset managers, ETF providers and investment banks choose FTSE Russell solutions to benchmark their investment performance and create investment funds, ETFs, structured products, and index-based derivatives. Our clients use our solutions for asset allocation, investment strategy analysis and risk management, and value us for our robust governance process and operational integrity.

For over 35 years we have been at the forefront of driving change for the investor, always innovating to shape the next generation of benchmarks and investment solutions that open up new opportunities for the global investment community.

To learn more, visit lseg.com/ftse-russell; email info@ftserussell.com; or call your regional Client Service Team office:

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