What we're looking at

A collection of some of the oldest mutual funds in the Canadian market.

Today's Screen

The mutual fund industry really took off in the mid-1980s and has been pumping out new products since then at a tremendous rate. But there are a small number of funds that have been around for 40 to 50 years or more. We gathered up these funds and then asked the question: Does age equal wisdom, or at least good returns? To find out, we included the return since inception for the funds on our list (it wasn't available for some funds), as well as the 10-year quartile ranking. To see how our funds are doing lately, we included one-year quartile data as well. Quartile rankings compare returns for a particular category and then break the results down into four groups. First quartile is best, fourth is worst.

What We Found

Mutual fund managers come and go, fund mandates change, and fund companies get bought out and restructured. So read the long-term performance data here with caution. That said, there do seem to be some consistently good results here.

Take Dynamic Value Fund of Canada, for example. Its compound average annual return of 11.5 per cent since it opened for business in 1957 is outstanding, and so is its consistency. Over virtually all measured time frames, it has delivered far better than average returns.

Be wary of funds with great returns since inception that seem to have been fuelled by glory years long past. Templeton Growth is one. The annualized 12-per-cent return since the fund opened is brilliant, but its 10-year compound average annual loss of 1.5 per cent reflects the general hideousness of global equity funds in general.

Note: Some old funds may not be on this list because they have changed ownership many times and their original inception date is no longer used to calculate historical returns. An example is IA Clarington Canadian Conservative Equity, which has a very respectable 20-year compound average annual return of 8.5 per cent.

Old-Timer Mutual Funds (Data as of July 2009)

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