S&P Dow Jones Indices

A Division of S&P Global

# S&P Global 500 지수

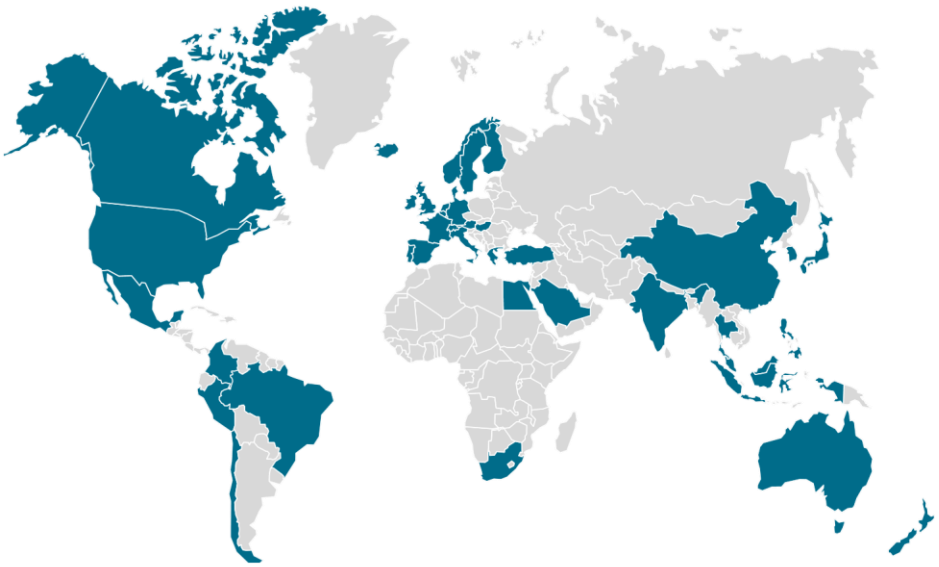
## 익숙한 500 개 기업 구성 방식, 이제 글로벌 시장으로 확대

선진시장 및 신흥시장 전반에서 가장 규모가 큰 500 개 기업의 성과를 추적하는 S&P Global 500 지수는 500 개 기업 지수 특유의 명확성, 단순성, 확장성을 글로벌 주식시장에 적용합니다. 이 지수는 광범위한 지리적 포괄성과 종목 수를 고정한 집중적인 구성방식을 결합하여, 주요 글로벌 기업을 투명하고 유동적이며 차별화된 방식으로 대표합니다.

### 왜 S&P Global 500 지수인가?

- Tracks 500 leading global companies
- Includes developed and emerging markets
- Covers ~70% of global investable equity market cap
- Rules-based construction, featuring a float-adjusted, market-cap-weighted approach, built on the well-established S&P Global BMI framework
- Supported by the strength and recognition of the index provider behind 500®

### S&P Global 500 지수 구성 시장



For more details on market eligibility, see our the S&P Market Classification page.

### 견고한 거버넌스 및 산출 체계

S&P DJI 는 투명성, 독립성, 무결성을 최우선으로 하며, 이러한 원칙은 S&P Global 500 지수의 규칙기반 방법론에 내재되어 있습니다. 지수산업협회의 공동 설립기관인 S&P DJI 는 업계 모범 관행을 지원하며 변화하는 지역별 규제 기준을 준수합니다.

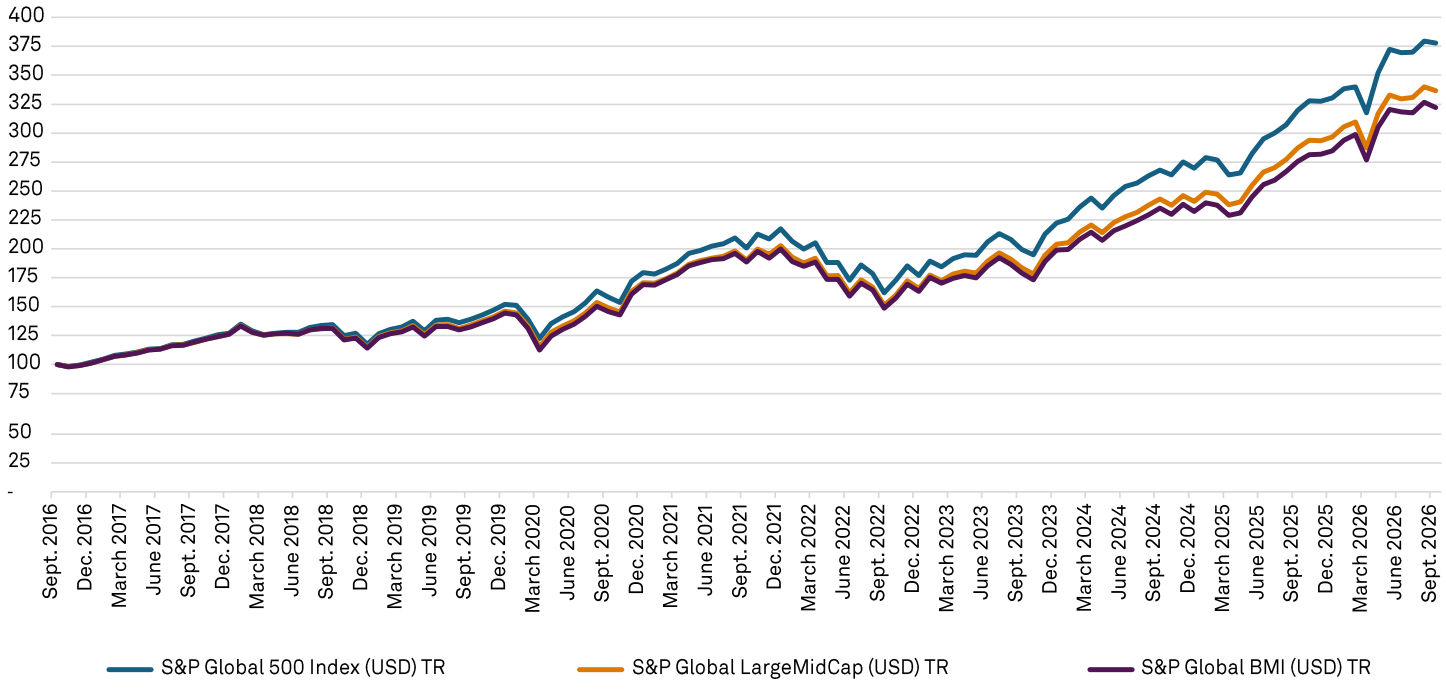
## 지수 구성 방식

| | |
|---|---|
| **유니버스** | S&P Global BMI 지수 |
| **시장 적격성** | S&P DJI 의 분류 기준에 따른 선진시장 26 개 및 신흥시장 23 개* |
| **구성종목 선정** | 유동주식수 조정 조정 시가총액 기준 상위 500 개 적격 기업(10% 선정 버퍼 적용) |
| **가중치 부여 방식** | 유동주식수 조정 시가총액 기준 |
| **구성종목 정기 검토** | 매년 3 월과 9 월에 반기별 전면 검토 실시 |
| **지수 주식수 및 투자가중치계수 (IWF) 업데이트** | 분기별 |
| **기업공개(IPO)** | Fast-track 상위 250 위 이내에 해당하는 적격 기업에는 신속 편입 절차를 적용하며, 기타 IPO 기업 및 분할 신설기업은 구성종목 업데이트 시 평가 |

지수 구성에 관한 자세한 내용은 S&P Global 500 지수 방법론을 참조하시기 바랍니다.

*시장 적격성에 관한 자세한 내용은 당사의 시장분류 페이지를 참조하시기 바랍니다.

## 10 년 지수 성과




Source: S&P Dow Jones Indices LLC. Data from Sept. 30, 2016, to Sept. 30, 2026. Index performance based on (gross) total returns in USD.
The S&P Global 500 Index was launched on Oct. 9, 2026. Past performance is no guarantee of future results. Chart is provided for illustrative purposes and reflects hypothetical historical performance. Please see the Performance Disclosure at the end of this document for more information regarding the inherent limitations associated with back-tested performance.

**Performance Disclosure/Back-Tested Data**

The S&P Global 500 Index was launched October 9, 2026. All information presented prior to an index's Launch Date is hypothetical (back-tested), not actual performance, and is based on the index methodology in effect on the index launch date. However, when creating back-tested history for periods of market anomalies or other periods that do not reflect the general current market environment, index methodology rules may be relaxed to capture a large enough universe of securities to simulate the target market the index is designed to measure or strategy the index is designed to capture. For example, market capitalization and liquidity thresholds may be reduced. In addition, forks have not been factored into the back-test data with respect to the S&P Cryptocurrency Indices. For the S&P Cryptocurrency Top 5 & 10 Equal Weight Indices, the custody element of the methodology was not considered; the back-test history is based on the index constituents that meet the custody element as of the Launch Date. Also, the treatment of corporate actions in back-tested performance may differ from treatment for live indices due to limitations in replicating index management decisions. Complete index methodology details are available at www.spglobal.com/spdji. Back-tested performance reflects application of an index methodology and selection of index constituents with the benefit of hindsight and knowledge of factors that may have positively affected its performance, cannot account for all financial risk that may affect results and may be considered to reflect survivor/look ahead bias. Actual returns may differ significantly from, and be lower than, back-tested returns. Past performance is not an indication or guarantee of future results.

Please refer to the methodology for the Index for more details about the index, including the manner in which it is rebalanced, the timing of such rebalancing, criteria for additions and deletions, as well as all index calculations. Back-tested performance is for use with institutions only; not for use with retail investors.

S&P Dow Jones Indices defines various dates to assist our clients in providing transparency. The First Value Date is the first day for which there is a calculated value (either live or back-tested) for a given index. The Base Date is the date at which the index is set to a fixed value for calculation purposes. The Launch Date designates the date when the values of an index are first considered live: index values provided for any date or time period prior to the index's Launch Date are considered back-tested. S&P Dow Jones Indices defines the Launch Date as the date by which the values of an index are known to have been released to the public, for example via the company's public website or its data feed to external parties. For Dow Jones-branded indices introduced prior to May 31, 2013, the Launch Date (which prior to May 31, 2013, was termed "Date of introduction") is set at a date upon which no further changes were permitted to be made to the index methodology, but that may have been prior to the Index's public release date.

Typically, when S&P DJI creates back-tested index data, S&P DJI uses actual historical constituent-level data (e.g., historical price, market capitalization, and corporate action data) in its calculations. As ESG investing is still in early stages of development, certain datapoints used to calculate S&P DJI's ESG indices may not be available for the entire desired period of back-tested history. The same data availability issue could be true for other indices as well. In cases when actual data is not available for all relevant historical periods, S&P DJI may employ a process of using "Backward Data Assumption" (or pulling back) of ESG data for the calculation of back-tested historical performance. "Backward Data Assumption" is a process that applies the earliest actual live data point available for an index constituent company to all prior historical instances in the index performance. For example, Backward Data Assumption inherently assumes that companies currently not involved in a specific business activity (also known as "product involvement") were never involved historically and similarly also assumes that companies currently involved in a specific business activity were involved historically too. The Backward Data Assumption allows the hypothetical back-test to be extended over more historical years than would be feasible using only actual data. For more information on "Backward Data Assumption" please refer to the FAQ. The methodology and factsheets of any index that employs backward assumption in the back-tested history will explicitly state so. The methodology will include an Appendix with a table setting forth the specific data points and relevant time period for which backward projected data was used.

Index returns shown do not represent the results of actual trading of investable assets/securities. S&P Dow Jones Indices maintains the index and calculates the index levels and performance shown or discussed but does not manage actual assets. Index returns do not reflect payment of any sales charges or fees an investor may pay to purchase the securities underlying the Index or investment funds that are intended to track the performance of the Index. The imposition of these fees and charges would cause actual and back-tested performance of the securities/fund to be lower than the Index performance shown. As a simple example, if an index returned 10% on a US $100,000 investment for a 12-month period (or US $10,000) and an actual asset-based fee of 1.5% was imposed at the end of the period on the investment plus accrued interest (or US $1,650), the net return would be 8.35% (or US $8,350) for the year. Over a three-year period, an annual 1.5% fee taken at year end with an assumed 10% return per year would result in a cumulative gross return of 33.10%, a total fee of US $5,375, and a cumulative net return of 27.2% (or US $27,200).

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S&P Dow Jones Indices keeps certain activities of its business units separate from each other in order to preserve the independence and objectivity of their respective activities. As a result, certain functions of S&P Dow Jones Indices may have information that is not available to other business units. For more information on any of our indices please visit www.spglobal.com/spdji.