

Fund Tearsheet
Form 5500 data pulled August 1, 2026

TOTAL AUM (2024)

\$202.6B

↑ +20.4% vs 2023

UNIQUE PLANS

20,351

Plans holding this fund

MARKET RANK

#1

By AUM among mutual funds

PEAK AUM

\$202.6B

2024

2-YEAR GROWTH

+61.7%

vs 2022

AVG PLAN ALLOCATION

17.3%

Of plan AUM (top plans)

AVG RANK IN PLAN

#4.5

Top-10 holding in 92% of plans

FUND PROFILE

SEC Prospectus

CATEGORY

Index

INVESTMENT OBJECTIVE

Fidelity 500 Index Fund seeks to provide investment results that correspond to the total return (i.e., the combination of capital changes and income) performance of common stocks publicly traded in the United States.

PRINCIPAL STRATEGY

Normally investing at least 80% of assets in common stocks included in the S&P 500 Index. The S&P 500 Index is a market capitalization-weighted index of 500 common stocks that represents the performance of the large-capitalization segment of the U.S. market. Derivative instruments that provide investment exposure to the investments above or exposure to one or more market risk factors associated with such investments are included in the fund's 80% policy, consistent with the fund's investment policies and limitations with respect to investments in derivatives. Lending securities to earn income for the fund. The fund may operate as a non-diversified fund, as defined under the Investment Company Act of 1940 (1940 Act), to the approximate extent the index is non-diversified. The fund may therefore operate as non-diversified solely as a result of a change in relative market capitalization or index weighting of one or more constituents of the index.

From the fund's SEC prospectus (Risk/Return Summary) — "Fidelity 500 Index Fund". Descriptive only — not investment advice.

PERFORMANCE & FLOWS

SEC N-PORT

TRAILING 1-YR RETURN

+17.0%

through 2026-05

CATEGORY PERCENTILE

38th

Index · 545 funds

NET FLOW (3-MO)

+\$7.3B

+1.0% of net assets

Annualized: 3yr +21.8% 5yr +14.2%

Matched to SEC series "FIDELITY Fidelity 500 Index Fund" (exact_norm). Trailing return chained from N-PORT monthly total returns; net flow is the latest 3-month sales - redemptions + reinvestments. Analytical, not investment advice.

COMPOSITE SCORE

Multi-factor

79.7

Rank #262 of 10,000 mutual funds · FY2024

COMPOSITE (0-100)

Scale

100 \$202.6B AUM

Adoption

93.5

20,351

plans

Performance

37.5

+17.0%

1yr return

Cost

95.7

1 bps

net expense

Momentum

62

+20%

YoY AUM

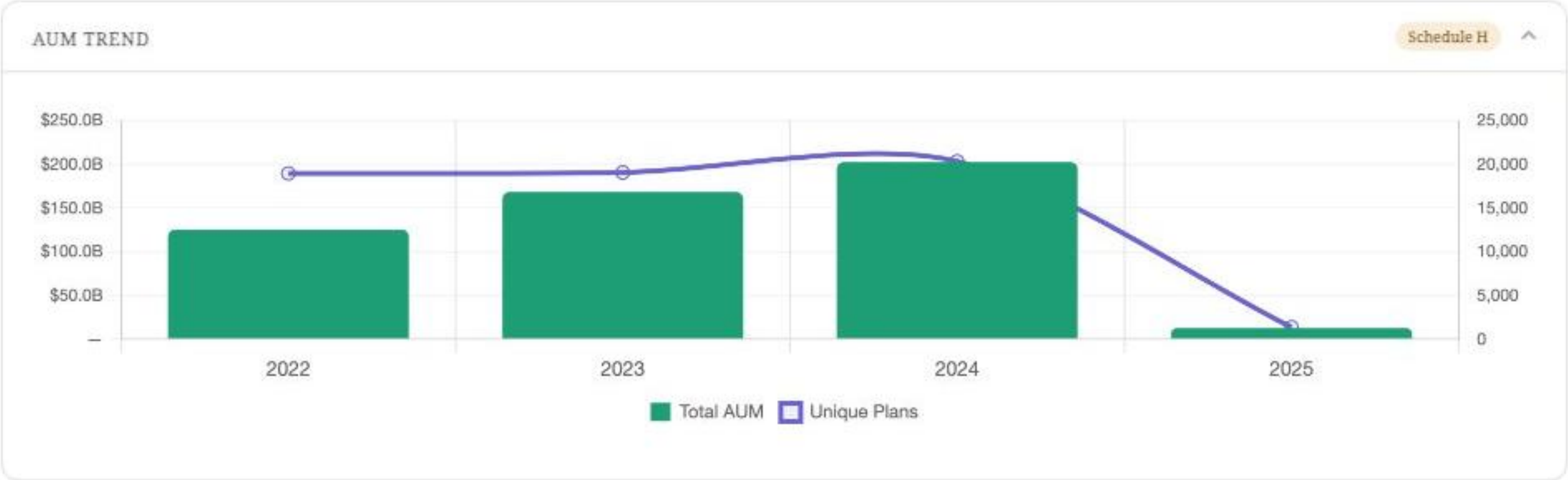
Category

100

Index

standing

Each factor is a percentile (0–100) vs. same-vehicle peers; the composite is the weighted blend. Blank factors (no SEC match / no 12-month return) are renormalised out. Full weights on the [Rankings tab](#).



COMPETITORS — INDEX (2024)

Schedule H

Ranked #1 of 805 Index funds by 401(k) adoption AUM.

RANK	FUND	MANAGER	AUM	PLANS	1YR
#1	► FIDELITY 500 INDEX FUND	FIDELITY	\$202.6B	20,351	+17.0%
#2	VANGUARD INSTITUTIONAL 500 INDEX TRUST	VANGUARD	\$125.7B	215	—
#3	VANGUARD INSTITUTIONAL INDEX FUND	VANGUARD	\$109.7B	2,396	+17.8%
#4	BLACKROCK EQUITY INDEX FUND F	BLACKROCK	\$67.4B	31	—
#5	VANGUARD 500 INDEX FUND	VANGUARD	\$50.6B	12,473	+17.8%
#6	GEODE CAPITAL MANAGEMENT SPARTAN GROUP TRUST	GEODE CAPITAL MANAGEMENT	\$41.7B	183	—
#7	VANGUARD MID-CAP INDEX FUND	VANGUARD	\$33.6B	14,833	+12.8%

Category assigned by fund-name classification; ranked by 401(k) plan AUM (adoption), not investment performance. 1yr return shown where SEC-matched (blank for collective trusts).

OTHER FUNDS BY FIDELITY (2024)

Schedule H

FUND	AUM	PLANS	RANK
► FIDELITY 500 INDEX FUND	\$202.6B	20,351	#1
FIDELITY GROWTH COMPANY COMMINGLED POOL	\$56.7B	198	#3
FIDELITY CONTRAFUND COMMINGLED POOL	\$39.3B	168	#5
FIDELITY CONTRAFUND	\$37.1B	3,285	#12
FIDELITY GROWTH COMPANY FUND	\$27.0B	2,043	#20
FIDELITY BLUE CHIP GROWTH FUND	\$19.1B	2,378	#27
FIDELITY FREEDOM 2030 FUND	\$18.0B	3,688	#29
FIDELITY FREEDOM 2035 FUND	\$17.2B	3,643	#31
FIDELITY MID CAP INDEX FUND	\$17.1B	12,957	#32

PLAN FLOW — 30 NEW · 30 EXITED (VS 2023)		Schedule H ^	
↑ NEW ADOPTERS (2024)		30 plans	
PLAN	HOLDING	PLAN	PRIOR HOLDING
WOLTERS KLUWER 401(K) PLA IL	\$353.3M	RBC- U.S.A. RETIREMENT AND MN	\$568.0M
AMENTUM 401(K) RETIREMENT VA	\$336.8M	OMNICOM GROUP RETIREMEN NY	\$543.0M
COMMONSPIRIT HEALTH ERISA KY	\$333.6M	VMWARE INC. 401(K) SAVINGS CA	\$539.7M
ENDEAVOR HEALTH LEGACY 4 IL	\$320.6M	TRANSAMERICA 401(K) RETIRE IA	\$514.3M
NAVY FEDERAL 401(K) SAVING VA	\$315.0M	ADVANCED MICRO DEVICES, II TX	\$512.9M
IOWA HEALTH SYSTEM SECTIC IA	\$298.6M	NEWS CORP 401(K) SAVINGS P NY	\$489.6M
THE TAX SHELTERED ANNUITY TX	\$296.0M	ENVISION HEALTHCARE OPER TN	\$485.0M
MARVELL SEMICONDUCTOR 401 CA	\$290.3M	EVERSOURCE 401K PLAN CT	\$447.3M

HISTORICAL PERFORMANCE					Schedule H ^	
FISCAL YEAR	TOTAL AUM	ASSET GROWTH	UNIQUE PLANS	PLAN GROWTH		
2025	\$12.6B	−93.8%	1,372	−93.3%		
2024	\$202.6B	+20.4%	20,351	+6.7%		
2023	\$168.2B	+34.3%	19,077	+0.6%		
2022	\$125.3B	—	18,972	—		

TOP PLANS HOLDING THIS FUND (2024)				Schedule H ^	
PLAN	STATE	HOLDINGS IN THIS FUND	% OF PLAN AUM		
FIDELITY RETIREMENT SAVINGS PLAN EIN 043532603	MA	\$3.9B	11.3%		
VISA 401K PLAN EIN 260267673	CA	\$903.1M	17.4%		
APPLIED MATERIALS, INC. EMPLOYEE SAVINGS EIN 941655526	CA	\$840.8M	13.6%		
SUTTER HEALTH 403(B) SAVINGS PLAN EIN 942788907	CA	\$815.8M	10.7%		
ECOLAB SAVINGS PLAN AND ESOP EIN 410231510	MN	\$766.3M	18.3%		
SAMSUNG 401(K) PLAN EIN 132951153	NJ	\$684.0M	21.9%		
CBRE 401(K) PLAN EIN 521616016	TX	\$682.8M	15.7%		

NTT DATA AMERICAS 401(K) PLAN EIN 042437166	TX	\$625.6M	23.2%
PUBLICIS BENEFITS CONNECTION 401K PLAN EIN 362677628	IL	\$620.6M	11.9%
THE MITRE CORPORATION TAX SHELTERED AN EIN 042239742	VA	\$615.6M	12.0%
SPECTRUM HEALTH SYSTEM 403(B) PLAN EIN 383382353	MI	\$572.8M	17.8%
SHI INTERNATIONAL CORP 401(K) SAVINGS PLA EIN 223009648	NJ	\$558.6M	65.7%
PROFIT PARTICIPATION PLAN OF MOODY'S COF EIN 133998945	NY	\$545.6M	26.2%
BEAUMONT HEALTH 403(B) RETIREMENT SAVIN EIN 381459362	MI	\$520.2M	17.5%
MEDSTAR HEALTH, INC. RETIREMENT SAVINGS EIN 522087445	MD	\$513.1M	14.9%
NORTHWESTERN MEMORIAL EMPLOYEE 401(K) EIN 363152959	IL	\$506.6M	9.3%
TEXAS HEALTH 401(K) RETIREMENT PLAN EIN 752702388	TX	\$483.2M	14.6%
SERVICENOW, INC. 401(K) PLAN EIN 202056195	CA	\$474.1M	23.8%
DASSAULT SYSTEMES EMPLOYEE SAVINGS PL EIN 510379588	MA	\$429.3M	20.6%
SANFORD RETIREMENT SAVINGS PLAN EIN 271218956	ND	\$403.2M	11.2%
INOVA HEALTH SYSTEM RETIREMENT SAVINGS EIN 541071867	VA	\$396.8M	11.4%
FOX SAVINGS PLAN EIN 832044074	NY	\$394.8M	15.6%
SENTARA 403(B) SAVINGS PLAN EIN 521271901	VA	\$386.0M	10.3%
OASIS RETIREMENT SAVINGS PLAN EIN 650731524	FL	\$383.5M	18.0%
ZF NORTH AMERICA, INC. 401(K) SAVINGS PLAN EIN 611462969	MI	\$381.7M	22.2%
MOLSON COORS EMPLOYEES' RETIREMENT AN EIN 262387410	WI	\$379.8M	17.8%
HOGAN LOVELLS US LLP RETIREMENT SAVING EIN 530084704	DC	\$378.0M	19.8%
CAPGEMINI SAFE HARBOR 401(K) PLAN EIN 222575929	NY	\$371.9M	14.8%
CRH AMERICAS 401(K) PLAN EIN 953298140	GA	\$369.0M	8.8%
NEXSTAR MEDIA GROUP, INC. 401(K) PLAN EIN 233083125	TX	\$356.0M	17.8%
BMW SAVINGS PLAN EIN 222139469	NJ	\$354.4M	15.1%
WOLTERS KLUWER 401(K) PLAN EIN 133577870	IL	\$353.3M	14.8%
TCS 401(K) PLAN EIN 132805758	NJ	\$344.0M	14.6%

FORTIVE RETIREMENT SAVINGS PLAN EIN 475654583	WA	\$337.6M	15.8%
AMENTUM 401(K) RETIREMENT PLAN EIN 271628265	VA	\$336.8M	13.5%
DLA PIPER LLP (US) PROFIT SHARING AND 401(K) RETIREMENT PLAN EIN 528616490	MD	\$336.3M	19.3%
COMMONSPIRIT HEALTH ERISA 403(B) PLAN EIN 478617373	KY	\$333.6M	11.3%
ENVIRONMENTAL SYSTEMS RESEARCH INSTITUTE EIN 952775732	CA	\$324.2M	15.1%
THE MAGNA GROUP OF COMPANIES RETIREMENT PLAN EIN 988095901	—	\$323.1M	13.1%
CITADEL RETIREMENT SAVINGS PLAN EIN 364108019	FL	\$322.9M	26.8%
ENDEAVOR HEALTH LEGACY 403(B) TAX DEFERRED ANNUITY PLAN EIN 362167060	IL	\$320.6M	15.4%
KLA 401(K) PLAN EIN 842564110	CA	\$316.1M	15.0%
GLOBAL PAYMENTS INC. 401(K) PLAN EIN 582567903	GA	\$316.0M	13.5%
NAVY FEDERAL 401(K) SAVINGS PLAN EIN 538116705	VA	\$315.0M	9.8%
THE MITRE CORPORATION QUALIFIED RETIREMENT PLAN EIN 842239742	VA	\$303.6M	10.8%
BDO USA RETIREMENT PLAN EIN 135381590	IL	\$299.8M	15.4%
IOWA HEALTH SYSTEM SECTION 401(K) RETIREMENT PLAN EIN 421435199	IA	\$298.6M	9.0%
THE MEDICAL COLLEGE OF WISCONSIN, INC. RETIREMENT PLAN EIN 398806261	WI	\$297.7M	11.5%
THE TAX SHELTERED ANNUITY PLAN OF THE MIAMI HERALD EIN 768125391	TX	\$296.0M	9.9%
HENKEL 401(K) AND DEFINED CONTRIBUTION PLAN EIN 411372525	CT	\$292.8M	12.2%
JOHN MUIR HEALTH 403B PLAN EIN 941461843	CA	\$292.1M	21.2%
MARVELL SEMICONDUCTOR 401K RETIREMENT PLAN EIN 778398669	CA	\$290.3M	21.3%
NRG AFFILIATES EMPLOYEE SAVINGS PLAN EIN 411968764	NJ	\$285.6M	12.3%
CHICAGO MERCANTILE EXCHANGE, INC. 401(K) RETIREMENT PLAN EIN 364348266	IL	\$285.1M	26.4%
EQUIFAX INC. 401K PLAN EIN 588401110	GA	\$284.8M	19.3%
YAHOO 401(K) SAVINGS PLAN EIN 813443155	NY	\$283.8M	23.9%
ALVAREZ & MARSAL HOLDINGS, LLC 401(K) ANNUITY PLAN EIN 562409465	NY	\$283.6M	24.7%
ENTEGRIS, INC. 401(K) RETIREMENT SAVINGS PLAN EIN 411941551	MA	\$282.2M	32.0%
SELECT MEDICAL CORPORATION 401(K) PLAN EIN 232872718	PA	\$281.1M	9.9%

HENRY SCHEIN, INC. 401(K) SAVINGS PLAN EIN 113136595	NY	\$278.2M	17.9%
MW&E SAVINGS AND RETIREMENT PLAN EIN 361453176	IL	\$277.9M	20.0%
HARTFORD HEALTHCARE 401(K) RETIREMENT I EIN 222672834	CT	\$272.7M	9.5%
RENESAS ELECTRONICS AMERICA INC. 401(K) F EIN 942669985	CA	\$267.2M	19.7%
SS&C TECHNOLOGIES, INC. 401(K) RETIREMEN EIN 061169696	CT	\$260.4M	14.5%
GANNETT MEDIA CORP. 401(K) SAVINGS PLAN EIN 472390983	NY	\$259.4M	16.5%
JEFFERIES EMPLOYEES' PROFIT SHARING PLA EIN 132615557	NY	\$258.2M	20.0%
SUSQUEHANNA INTERNATIONAL GROUP, LLP 40 EIN 232795207	PA	\$255.7M	27.4%
GLOBALFOUNDRIES U.S. INC. 401(K) PLAN EIN 263122131	CA	\$255.3M	20.4%
UNIVERSITY OF WISCONSIN MEDICAL FOUNDAT EIN 391824445	WI	\$253.3M	17.8%
US ACUTE CARE SOLUTIONS PROFIT SHARING/ EIN 341807694	OH	\$246.6M	12.7%
VERTEX PHARMACEUTICALS INCORPORATED 40 EIN 043039129	MA	\$246.2M	18.8%
YALE-NEW HAVEN HOSPITAL AND TAX EXEMPT EIN 060646652	CT	\$245.3M	10.6%
WAKEMED RETIREMENT SAVINGS PLAN EIN 566017737	NC	\$244.9M	17.0%
BAYLOR COLLEGE OF MEDICINE SECTION 403B EIN 741613878	TX	\$242.4M	11.1%
SABRE GLBL INC. 401(K) SAVINGS PLAN EIN 752109502	TX	\$241.1M	22.5%
CITRIX SYSTEMS, INC. 401(K) PLAN EIN 770449727	FL	\$238.8M	14.9%
THE QUEEN'S HEALTH SYSTEMS RETIREMENT I EIN 990238120	HI	\$234.8M	12.0%
AIRBNB 401(K) PLAN EIN 263051428	CA	\$232.4M	23.7%
SANMINA CORPORATION 401(K) PLAN EIN 770228183	CA	\$231.0M	39.1%
RWJBARNABAS HEALTH 401(K) SAVINGS PLAN EIN 222405279	NJ	\$229.5M	7.7%

