



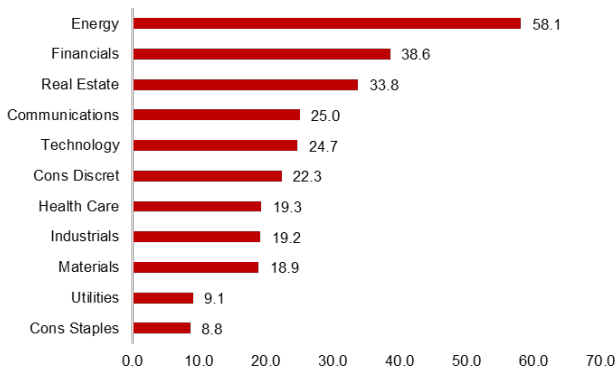
Equities	Last	1 Week	QTD	YTD
S&P 500	4,605.38	1.35%	7.01%	24.04%
DJIA	35,820.00	0.40%	5.93%	18.77%
NASDAQ	15,498.39	2.72%	7.29%	20.88%
Russell 1000 Growth	1,981.60	2.60%	8.66%	24.20%
Russell 1000 Value	1,000.63	-0.44%	5.08%	22.03%
Russell Midcap	8,506.80	-0.40%	5.95%	22.02%
Russell 2000	5,709.10	0.27%	4.25%	17.19%
MSCI EAFE	2,335.53	-0.11%	2.46%	11.01%
MSCI EM (Emerging Markets)	1,264.75	-2.18%	0.99%	-0.27%

Fixed Income	Last	1 Week	QTD	YTD
Bloomberg US Aggregate	2,354.21	0.52%	-0.03%	-1.58%
Bloomberg Municipal State GO (10 Y)	410.40	0.07%	-0.33%	-0.22%
Bloomberg Global Aggregate USD	266.41	0.51%	-0.04%	-1.45%

Interest Rates	10/29/21	10/22/21	9/30/21	12/31/20
US Treasury Constant Maturity - 2 Year	0.48%	0.48%	0.28%	0.13%
US Treasury Constant Maturity - 5 Year	1.18%	1.22%	0.98%	0.36%
US Treasury Constant Maturity - 10 Year	1.55%	1.66%	1.52%	0.93%
Germany Benchmark Bond - 10 Year	-0.09%	-0.10%	-0.19%	-0.58%
Mexico Benchmark Bond - 10 Year	7.55%	7.54%	7.37%	5.55%
30 Year Fixed-Rate Mortgages, Average, US	3.14%	3.19%	3.18%	2.87%
US Prime Rate	3.25%	3.25%	3.25%	3.25%

Commodities & Currencies	10/29/21	10/22/21	09/30/21	12/31/20
Crude Oil Brent Global	84.38	85.43	84.38	51.22
Gold NYMEX	1,783.00	1,795.50	1,783.00	1,893.10
\$ per €	1.16	1.16	1.16	1.22
¥ per \$	114.03	113.60	114.03	103.25

S&P 500 Sector Performance Year to Date



U.S. Economic Releases

Last Week

- October Consumer Confidence 113.8, above prior and consensus
- Q3 US GDP SAAR Q/Q (First Preliminary) 2.0%, below prior and consensus
- October Chicago PMI SA 68.4, above prior and consensus

Coming up this week

- FOMC Meeting / Fed Funds Target Upper Bound 11/3
- Q3 Unit Labor Costs SAAR Q/Q (Preliminary) 11/4
- October Nonfarm Payrolls SA 11/5

Year to Date Performance by Asset Class

U.S. Equity

	Value	Core	Growth
Large	22.03%	23.18%	24.20%
Mid	24.54%	22.02%	17.29%
Small	27.60%	17.19%	7.64%

International Equity

	Value	Core	Growth
Large	11.07%	8.33%	5.50%
Mid	10.24%	8.82%	7.19%
Small	14.84%	13.99%	12.95%

U.S. Fixed Income

	Short	Intermed	Long
Government	-0.35%	-1.71%	-5.77%
Corporate	-0.26%	-1.56%	-0.88%
High Yield	5.39%	4.09%	7.88%

Commentary

- U.S. equities finished mostly higher with the S&P 500, Dow, and Nasdaq all up for a fourth straight week: S&P 500 (+1.35%), DOW (+0.40%), and Nasdaq (+2.72%).
- Growth stocks (+3.1%) meaningfully outperformed Value stocks (-0.7%) with Technology providing leadership. Energy ended down as crude oil suffered its first weekly pullback since late August.
- Q3 U.S. corporate earnings have been marked with positive sentiment as roughly 1/2 of the S&P 500 has reported. Companies from a broad range of industries continued to highlight a strong demand backdrop.
- Supply chain pressures continue to be cited by management teams in a wide range of industries as a drag on both sales and margins. The global chip shortage continued to get a lot of the supply chain scrutiny.
- Money continues to flow into equities – according to Lipper, global equity funds saw another \$24.5B+ in inflows last week, the most since mid-March. More than half of the inflows went to U.S. equity funds. Global bond inflows slowed with a fourth straight week of outflows from corporate bonds.
- More Fiscal stimulus looks increasingly likely as the White House unveiled the framework for a \$1.75T “Build Back Better” social spending bill that is expected to secure the support of key centrist Democrats in the Senate.

Important Disclosures

Performance from the style boxes comes from the following, in order of left-to-right then top-to-bottom:

- **US Equity Style Box:** Russell 1000 Value Index - Total Return; Russell 1000 Index - Total Return; Russell 1000 Growth Index - Total Return; Russell Midcap Value Index – Total Return; Russell Midcap Index - Total Return; Russell Midcap Growth Index - Total Return; Russell 2000 Value Index - Total Return; Russell 2000 Index - Total Return; Russell 2000 Growth Index - Total Return
- **International Equity Style Box:** MSCI AC World ex USA Large Cap Value Index - Total Return; MSCI AC World ex USA Large Cap Index - Total Return; MSCI AC World ex USA Large Cap Growth Index - Total Return; MSCI AC World ex USA Mid Cap Value Index - Total Return; MSCI AC World ex USA Mid Cap Index - Total Return; MSCI AC World ex USA Mid Cap Growth Index - Total Return; MSCI AC World ex USA Small Cap Value Index - Total Return; MSCI AC World ex USA Small Cap Index - Total Return; MSCI AC World ex USA Small Cap Growth Index - Total Return
- **U.S. Fixed Income Style Box:** Bloomberg Barclays Global US Treasury Index (1-3 Y); Bloomberg Barclays Global US Treasury Index – Intermediate; Bloomberg Barclays Global US Treasury Index – Long; Vanguard ST Corporate Bond ETF; Vanguard Int Corporate Bond ETF; Vanguard LT Corp Bond ETF; Bloomberg Barclays US High Yield Index (1-5Y); Bloomberg Barclays US Aggregate Credit Index - Corporate - High Yield – Intermediate; Bloomberg Barclays US Aggregate Credit Index - Corporate - High Yield - Long

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Past performance is no guarantee of future results, which may vary.

Source: FactSet Research Systems