



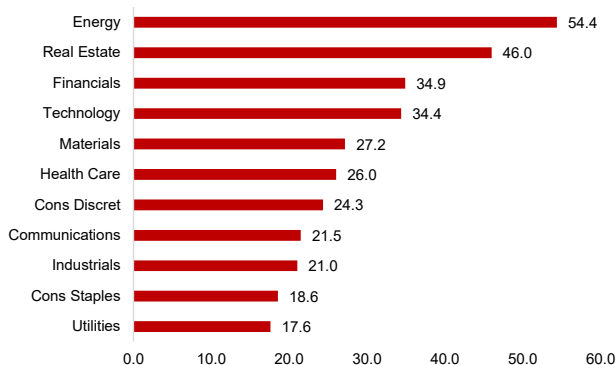
Equities	Last	1 Week	QTD	YTD
S&P 500	4,766.18	0.87%	11.03%	28.58%
DJIA	36,338.00	1.08%	7.87%	20.86%
NASDAQ	15,644.97	-0.05%	8.45%	22.08%
Russell 1000 Growth	2,033.16	0.21%	11.64%	27.48%
Russell 1000 Value	1,022.44	1.41%	7.77%	25.05%
Russell Midcap	8,521.89	1.24%	6.44%	22.49%
Russell 2000	5,580.17	0.21%	2.14%	14.76%
MSCI EAFE	2,336.07	0.89%	2.69%	11.22%
MSCI EM (Emerging Markets)	1,232.01	1.04%	-1.31%	-2.53%

Fixed Income	Last	1 Week	QTD	YTD
Bloomberg US Aggregate	2,355.14	0.16%	0.01%	-1.54%
Bloomberg Municipal State GO (10 Y)	414.41	0.03%	0.65%	0.76%
Bloomberg Global Aggregate USD	266.54	0.15%	0.00%	-1.40%

Interest Rates	12/31/21	12/23/21	9/30/21	12/31/20
US Treasury Constant Maturity - 2 Year	0.73%	0.71%	0.28%	0.73%
US Treasury Constant Maturity - 5 Year	1.26%	1.25%	0.98%	1.26%
US Treasury Constant Maturity - 10 Year	1.52%	1.50%	1.52%	1.52%
Germany Benchmark Bond - 10 Year	-0.18%	-0.24%	-0.19%	-0.18%
Mexico Benchmark Bond - 10 Year	7.59%	7.57%	7.37%	7.56%
30 Year Fixed-Rate Mortgages, Average, US	3.27%	3.19%	3.18%	3.27%
US Prime Rate	#N/A	3.25%	3.25%	#N/A

Commodities & Currencies	12/31/21	12/23/21	09/30/21	12/31/21
Crude Oil Brent Global	77.78	76.26	77.78	77.78
Gold NYMEX	1,827.50	1,811.20	1,827.50	1,827.50
\$ per €	1.14	1.13	1.14	1.14
¥ per \$	115.16	114.39	115.16	115.16

S&P 500 Sector Performance Year to Date



U.S. Economic Releases

Last Week

- Nov Pending Home Sales M/M -2.2%, below prior and consensus
- Dec Chicago PMI SA 63.1, above prior and consensus

Coming up this week

- Dec ISM Manufacturing SA 1/4
- Dec ISM Non Manufacturing SA 1/6
- Dec Nonfarm Payrolls SA 1/7

Year to Date Performance by Asset Class

U.S. Equity				International Equity				U.S. Fixed Income			
	Value	Core	Growth		Value	Core	Growth		Short	Intermed	Long
Large	25.05%	26.34%	27.48%	Large	10.65%	7.77%	4.82%	Government	-0.60%	-1.71%	-4.63%
Mid	28.22%	22.49%	12.68%	Mid	9.48%	7.87%	6.04%	Corporate	-0.42%	-1.44%	-1.31%
Small	28.15%	14.76%	2.82%	Small	14.10%	12.87%	11.48%	High Yield	5.94%	4.98%	8.98%

Commentary

- U.S. equities finished mostly higher last week to cap a year of strong performance domestically: S&P 500 +0.87%, DOW +1.08%, with the Nasdaq off slightly -0.05%.
- Value stocks outperformed Growth stocks as Tech and communication Services names lagged in the back half of the week. Communication Services saw pressure in the internet and entertainment groups, while AAPL and software names were a drag on Tech.
- Volumes were particularly light as New Years Eve holiday fell on Friday, with the usual storylines continuing to drive sentiment.
- More focus on Omicron variant of Covid-19 with US health officials expecting cases to peak by the end of January. South African officials said its Omicron wave has already peaked and the country has begun to remove restrictions.
- No change to the broader narratives as 2021 wrapped up, with the path of least resistance still to the upside. Tailwinds included the milder severity of the Omicron variant, positive seasonality factors, FY2022 margin outlook, and still accommodative monetary policy.

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