



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	1.19%	2.39%	5.50%	1.19%	11.87%	30.07%	10.01%	15.07%	13.02%	1.33%
Communications Services	0.91%	1.45%	6.44%	4.23%	20.73%	47.14%	6.28%	13.60%	9.31%	0.65%
Consumer Discretionary	0.01%	0.31%	2.71%	-1.74%	3.15%	26.92%	3.05%	10.67%	12.56%	0.69%
Consumer Staples	0.03%	0.99%	2.43%	1.52%	9.16%	5.67%	7.01%	9.81%	9.14%	2.61%
Energy	0.18%	0.95%	0.37%	-0.40%	13.23%	22.30%	25.98%	13.45%	4.17%	3.06%
Financials	0.72%	1.99%	4.50%	0.13%	12.60%	33.42%	5.66%	11.84%	11.34%	1.63%
Health Care	1.46%	2.88%	4.21%	-1.09%	7.67%	12.61%	7.55%	12.72%	11.60%	1.56%
Industrials	0.63%	1.24%	3.65%	-0.06%	10.91%	29.19%	8.11%	12.92%	10.94%	1.38%
Materials	0.16%	1.40%	3.79%	-0.97%	7.89%	19.07%	3.64%	13.53%	8.99%	1.85%
Real Estate	1.69%	4.67%	7.28%	-1.84%	-2.38%	8.63%	0.72%	4.75%	7.15%	3.53%
Technology	2.34%	4.06%	8.87%	2.96%	16.02%	47.60%	19.10%	25.58%	22.27%	0.68%
Utilities	1.44%	3.17%	8.62%	10.41%	15.45%	10.03%	6.55%	7.99%	9.24%	3.06%
DJIA	0.90%	2.23%	5.58%	0.39%	6.55%	21.98%	7.20%	11.53%	11.73%	1.82%
NASDAQ	1.42%	2.75%	6.99%	2.30%	11.83%	36.16%	8.44%	17.34%	15.67%	0.66%
Russell 3000	1.17%	2.42%	5.59%	0.95%	11.06%	29.65%	8.48%	14.30%	12.45%	1.30%
Russell 1000 Growth	1.54%	2.64%	6.60%	2.08%	13.73%	38.77%	11.94%	18.61%	16.20%	0.66%
Russell 1000 Value	0.72%	2.12%	4.23%	-0.22%	8.74%	20.82%	5.89%	10.15%	8.93%	2.09%
Russell Midcap	0.99%	2.44%	5.00%	-0.68%	7.86%	23.44%	4.32%	10.74%	9.97%	1.47%
Russell 2500	0.95%	2.83%	6.50%	-0.63%	6.24%	22.84%	1.89%	9.62%	9.18%	1.40%
Russell 2000	1.14%	2.68%	6.93%	-0.60%	4.55%	21.41%	-0.39%	7.80%	8.20%	1.29%
MSCI AC World	1.02%	2.30%	5.07%	1.65%	10.10%	24.22%	6.57%	11.76%	9.22%	1.80%
MSCI AC World ex USA	0.67%	2.12%	4.30%	2.51%	7.44%	14.48%	2.21%	7.17%	4.73%	2.61%
MSCI EAFE	0.86%	2.46%	4.61%	2.04%	8.09%	14.84%	4.48%	8.25%	5.28%	2.73%
MSCI Europe	0.87%	2.96%	5.89%	4.06%	9.67%	15.61%	5.76%	9.27%	5.21%	2.79%
MSCI Japan	0.91%	1.31%	0.89%	-4.00%	6.71%	17.12%	3.53%	7.54%	6.65%	1.96%
MSCI EM (Emerging Markets)	0.36%	1.73%	3.84%	4.33%	6.87%	14.30%	-3.16%	4.27%	3.37%	2.30%
MSCI EM Asia	0.39%	2.17%	4.21%	5.19%	8.79%	14.71%	-3.89%	5.17%	5.02%	1.90%
MSCI EM Eastern Europe	0.77%	2.21%	6.17%	8.49%	10.36%	39.44%	-31.71%	-17.30%	-7.79%	#N/A
MSCI EM Latin America	-0.06%	-0.47%	3.05%	-0.54%	-4.42%	13.82%	7.54%	5.11%	1.37%	4.51%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.66%	1.02%	2.41%	-0.18%	-0.95%	1.42%	-2.73%	0.19%	1.35%	4.95%
Bloomberg Municipal State GO (10 Y)	0.05%	-0.14%	0.80%	-0.49%	-1.27%	0.99%	-0.51%	1.41%	2.40%	3.14%
Barclays US High Yield	0.37%	0.35%	1.36%	0.41%	1.89%	10.90%	1.95%	4.14%	4.35%	7.81%
Bloomberg Global Aggregate USD	0.64%	0.99%	2.36%	-0.14%	-0.83%	1.67%	-2.66%	0.30%	1.44%	5.00%
Bbg EM Gov't Diversified	0.58%	0.88%	2.63%	0.31%	-2.33%	1.64%	-4.03%	-0.45%	-0.55%	6.63%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	1.32%	4.33%	6.97%	-1.40%	-2.65%	8.52%	-0.25%	3.09%	6.05%	4.02%
Alerian MLP	-0.16%	-1.06%	1.41%	0.17%	14.08%	34.49%	23.31%	11.23%	2.49%	6.36%
Bloomberg Commodity	0.77%	1.91%	2.42%	5.17%	7.48%	7.10%	7.38%	7.75%	-1.15%	
US Dollar Index	-0.84%	-1.08%	-1.59%	0.53%	5.24%	8.10%	7.94%	3.52%	3.95%	
Interest Rates	5/15/24	5/8/24	12/29/23	12/30/22	12/31/21	12/31/20	12/31/19	12/31/18	12/29/17	
US Treasury Constant Maturity - 2 Year	4.73%	4.84%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	1.89%	
US Treasury Constant Maturity - 5 Year	4.35%	4.50%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	2.20%	
US Treasury Constant Maturity - 10 Year	4.36%	4.48%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	2.40%	
Germany Benchmark Bond - 10 Year	2.43%	2.46%	2.00%	2.49%	-0.19%	-0.58%	-0.19%	0.24%	0.47%	
Japan Benchmark Bond - 10 Year	0.95%	0.87%	0.61%	0.45%	0.07%	0.02%	-0.02%	0.01%	0.05%	
Mexico Benchmark Bond - 10 Year	9.70%	9.62%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	7.64%	
30 Year Fixed-Rate Mortgages, Average, US	7.27%	7.36%	6.99%	6.66%	3.27%	2.87%	3.86%	4.51%	3.95%	
US Prime Rate	8.50%	8.50%	8.50%	7.50%	3.25%	3.25%	4.75%	5.50%	4.50%	

Important Disclosures

Index yields were used for the S&P 500 and its sectors, while ETF yields were used as proxies for all other indexes. The iShares Russia ETF was used as a proxy for the MSCI EM Eastern Europe Index yield as Russia comprises nearly 70% of the index.

FTSE NAREIT returns are lagged by one day.

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