



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-1.11%	0.49%	0.49%	0.49%	0.49%	27.31%	9.76%	14.52%	13.29%	1.21%
Communications Services	-1.05%	2.51%	2.51%	2.51%	2.51%	44.97%	11.33%	14.63%	11.46%	0.66%
Consumer Discretionary	-2.21%	-0.50%	-0.50%	-0.50%	-0.50%	33.81%	6.01%	13.80%	13.75%	0.58%
Consumer Staples	-0.27%	-1.55%	-1.55%	-1.55%	-1.55%	12.93%	4.00%	8.50%	8.17%	2.34%
Energy	1.06%	2.61%	2.61%	2.61%	2.61%	7.22%	17.01%	12.42%	5.65%	3.36%
Financials	-0.15%	0.07%	0.07%	0.07%	0.07%	29.87%	7.51%	11.84%	11.67%	1.44%
Health Care	0.58%	1.60%	1.60%	1.60%	1.60%	2.06%	3.01%	8.36%	9.09%	1.68%
Industrials	-0.10%	0.43%	0.43%	0.43%	0.43%	20.39%	9.36%	11.73%	11.09%	1.34%
Materials	-0.02%	-0.44%	-0.44%	-0.44%	-0.44%	0.96%	-0.08%	9.33%	8.04%	2.05%
Real Estate	-0.72%	-1.72%	-1.72%	-1.72%	-1.72%	5.39%	-3.34%	4.52%	5.93%	3.40%
Technology	-2.39%	0.42%	0.42%	0.42%	0.42%	42.57%	17.66%	24.34%	22.60%	0.59%
Utilities	-0.26%	0.49%	0.49%	0.49%	0.49%	21.61%	5.94%	6.95%	8.42%	2.95%
DJIA	-0.42%	0.00%	0.00%	0.00%	0.00%	15.50%	7.63%	10.46%	11.67%	1.62%
NASDAQ	-1.89%	0.94%	0.94%	0.94%	0.94%	34.84%	10.13%	17.38%	15.86%	0.64%
Russell 3000	-1.10%	0.59%	0.59%	0.59%	0.59%	26.52%	9.00%	13.89%	12.75%	1.20%
Russell 1000 Growth	-1.92%	0.62%	0.62%	0.62%	0.62%	37.58%	12.50%	18.78%	16.96%	0.52%
Russell 1000 Value	-0.13%	0.54%	0.54%	0.54%	0.54%	15.25%	5.52%	8.88%	8.69%	2.02%
Russell Midcap	-0.75%	0.54%	0.54%	0.54%	0.54%	18.38%	4.95%	10.01%	9.81%	1.51%
Russell 2500	-0.72%	0.74%	0.74%	0.74%	0.74%	16.24%	3.57%	8.96%	9.11%	1.35%
Russell 2000	-0.74%	0.89%	0.89%	0.89%	0.89%	16.75%	2.54%	7.69%	8.14%	1.26%
MSCI AC World	-0.70%	0.69%	0.69%	0.69%	0.69%	20.56%	6.71%	10.65%	10.12%	1.72%
MSCI AC World ex USA	0.23%	0.95%	0.95%	0.95%	0.95%	8.63%	1.79%	4.78%	5.80%	2.79%
MSCI EAFE	0.33%	1.15%	1.15%	1.15%	1.15%	6.84%	2.65%	5.46%	6.28%	3.05%
MSCI Europe	0.14%	1.62%	1.62%	1.62%	1.62%	5.18%	2.49%	5.89%	6.32%	3.24%
MSCI Japan	1.08%	-0.20%	-0.20%	-0.20%	-0.20%	9.57%	3.14%	5.07%	6.92%	2.17%
MSCI EM (Emerging Markets)	0.11%	0.51%	0.51%	0.51%	0.51%	10.83%	-1.15%	2.18%	4.24%	2.26%
MSCI EM Asia	0.02%	0.20%	0.20%	0.20%	0.20%	15.40%	-0.90%	3.37%	5.33%	1.83%
MSCI EM Eastern Europe	0.69%	3.06%	3.06%	3.06%	3.06%	4.00%	-35.08%	-22.17%	-5.02%	#N/A
MSCI EM Latin America	1.40%	3.02%	3.02%	3.02%	3.02%	-22.33%	4.08%	-2.33%	1.35%	4.94%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.33%	-0.54%	-0.54%	-0.54%	-0.54%	1.91%	-2.08%	-0.49%	1.20%	4.99%
Bloomberg Municipal State GO (10 Y)	-0.07%	0.24%	0.24%	0.24%	0.24%	-0.08%	-0.20%	0.85%	2.22%	3.35%
Barclays US High Yield	-0.13%	0.39%	0.39%	0.39%	0.39%	9.77%	3.37%	4.21%	5.22%	7.40%
Bloomberg Global Aggregate USD	-0.33%	-0.53%	-0.53%	-0.53%	-0.53%	2.12%	-1.99%	-0.39%	1.31%	5.03%
Bbg EM Gov't Diversified	0.25%	0.66%	0.66%	0.66%	0.66%	0.14%	-1.53%	-1.93%	0.47%	6.46%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.72%	-1.74%	-1.74%	-1.74%	-1.74%	4.56%	-3.64%	2.84%	5.04%	3.80%
Alerian MLP	-0.41%	1.46%	1.46%	1.46%	1.46%	24.72%	25.00%	14.93%	3.67%	6.37%
Bloomberg Commodity	0.24%	0.82%	0.82%	0.82%	0.82%	6.10%	3.59%	6.73%	1.44%	
US Dollar Index	-0.37%	0.14%	0.14%	0.14%	0.14%	12.26%	8.78%	4.79%	3.41%	
Interest Rates	1/7/25	12/31/24	12/31/24	12/29/23	12/30/22	12/31/21	12/31/20	12/31/19	12/31/18	
US Treasury Constant Maturity - 2 Year	4.30%	4.25%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.46%	4.38%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.67%	4.58%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.47%	2.35%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.12%	1.09%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	10.37%	10.41%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	7.31%	7.28%	7.28%	6.99%	6.66%	3.27%	2.87%	3.86%	4.64%	
US Prime Rate	7.50%	7.50%	7.50%	8.50%	7.50%	3.25%	3.25%	4.75%	5.50%	

## 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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