



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.23%	-9.77%	-9.77%	-9.77%	-13.63%	-1.40%	5.60%	15.46%	11.26%	1.44%
Communications Services	1.03%	-7.66%	-7.66%	-7.66%	-13.39%	2.30%	9.25%	14.85%	9.24%	0.86%
Consumer Discretionary	-0.54%	-8.31%	-8.31%	-8.31%	-20.97%	-0.14%	1.17%	12.81%	10.38%	0.74%
Consumer Staples	-1.17%	-4.91%	-4.91%	-4.91%	0.06%	9.78%	3.82%	10.60%	8.18%	2.36%
Energy	-0.94%	-15.81%	-15.81%	-15.81%	-7.21%	-16.89%	4.42%	24.63%	4.16%	3.71%
Financials	-0.15%	-11.44%	-11.44%	-11.44%	-8.32%	7.86%	7.56%	17.95%	10.65%	1.67%
Health Care	-0.59%	-7.83%	-7.83%	-7.83%	-1.80%	-4.54%	-0.10%	10.04%	8.29%	1.77%
Industrials	-0.44%	-10.39%	-10.39%	-10.39%	-10.56%	-5.07%	7.26%	16.21%	9.58%	1.52%
Materials	-1.66%	-10.68%	-10.68%	-10.68%	-8.17%	-15.57%	-2.37%	12.55%	6.73%	2.16%
Real Estate	-2.40%	-9.15%	-9.15%	-9.15%	-5.90%	2.59%	-5.06%	7.47%	5.50%	3.56%
Technology	0.32%	-11.14%	-11.14%	-11.14%	-22.38%	-4.95%	10.46%	20.61%	19.11%	0.78%
Utilities	-1.50%	-6.88%	-6.88%	-6.88%	-2.28%	16.15%	1.76%	9.34%	8.67%	3.10%
DJIA	-0.91%	-9.57%	-9.57%	-9.57%	-10.36%	-0.66%	5.23%	13.08%	10.22%	1.84%
NASDAQ	0.10%	-9.79%	-9.79%	-9.79%	-19.05%	-3.28%	4.76%	15.45%	12.69%	#N/A
Russell 3000	-0.30%	-9.83%	-9.83%	-9.83%	-14.09%	-2.27%	4.87%	15.14%	10.57%	1.44%
Russell 1000 Growth	0.09%	-9.62%	-9.62%	-9.62%	-18.62%	-1.93%	7.06%	17.00%	13.86%	0.68%
Russell 1000 Value	-0.67%	-10.02%	-10.02%	-10.02%	-8.10%	-2.25%	2.91%	13.06%	7.58%	2.25%
Russell Midcap	-0.78%	-10.22%	-10.22%	-10.22%	-13.27%	-6.35%	1.34%	13.20%	7.60%	1.76%
Russell 2500	-0.91%	-10.40%	-10.40%	-10.40%	-17.12%	-11.02%	-1.08%	12.34%	6.25%	1.67%
Russell 2000	-0.92%	-10.01%	-10.01%	-10.01%	-18.54%	-11.04%	-1.99%	11.14%	5.16%	1.58%
MSCI AC World	-2.45%	-9.84%	-9.84%	-9.84%	-10.94%	-2.09%	4.20%	12.75%	8.06%	1.78%
MSCI AC World ex USA	-6.25%	-9.91%	-9.91%	-9.91%	-5.08%	-3.13%	2.13%	8.72%	4.09%	2.57%
MSCI EAFE	-6.05%	-10.69%	-10.69%	-10.69%	-4.43%	-4.56%	3.50%	9.53%	4.44%	2.71%
MSCI Europe	-5.04%	-10.13%	-10.13%	-10.13%	-0.57%	-2.36%	4.90%	11.12%	4.85%	2.78%
MSCI Japan	-9.28%	-13.06%	-13.06%	-13.06%	-12.62%	-12.23%	2.52%	6.27%	3.94%	2.12%
MSCI EM (Emerging Markets)	-7.89%	-9.00%	-9.00%	-9.00%	-6.26%	-1.40%	-0.80%	5.61%	2.79%	2.28%
MSCI EM Asia	-8.98%	-9.28%	-9.28%	-9.28%	-7.99%	0.04%	-0.45%	5.20%	3.55%	1.86%
MSCI EM Eastern Europe	-2.42%	-10.29%	-10.29%	-10.29%	15.08%	9.73%	13.97%	-14.06%	-5.78%	#N/A
MSCI EM Latin America	-2.45%	-6.24%	-6.24%	-6.24%	5.78%	-18.38%	-2.95%	10.27%	1.71%	4.09%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-1.13%	-0.26%	-0.26%	-0.26%	2.52%	5.71%	0.96%	-0.47%	1.41%	4.62%
Bloomberg Municipal State GO (10 Y)	-2.49%	-1.16%	-1.16%	-1.16%	-1.15%	-0.39%	1.35%	0.78%	2.12%	3.75%
Barclays US High Yield	-0.96%	-2.65%	-2.65%	-2.65%	-1.68%	5.33%	4.43%	6.79%	4.65%	8.63%
Bloomberg Global Aggregate USD	-1.12%	-0.28%	-0.28%	-0.28%	2.46%	5.74%	1.10%	-0.28%	1.50%	4.66%
Bbg EM Gov't Diversified	-0.90%	-0.25%	-0.25%	-0.25%	3.19%	3.71%	2.02%	0.79%	0.75%	6.43%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-2.94%	-9.68%	-9.68%	-9.68%	-7.05%	1.73%	-5.32%	7.56%	4.46%	4.19%
Alerian MLP	-3.02%	-13.62%	-13.62%	-13.62%	-2.75%	5.18%	18.69%	34.66%	5.47%	7.06%
Bloomberg Commodity	-1.55%	-7.73%	-7.73%	-7.73%	0.47%	0.05%	-3.52%	12.16%	1.61%	
US Dollar Index	0.21%	-0.81%	-0.81%	-0.81%	-3.70%	4.48%	5.99%	3.26%	2.43%	
Interest Rates	4/7/25	3/31/25	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	3.73%	3.89%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.82%	3.96%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.15%	4.23%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.62%	2.70%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.11%	1.52%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.08%	9.25%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.66%	6.77%	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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