



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.16%	8.34%	-3.78%	-3.78%	-7.89%	8.03%	8.74%	15.88%	11.81%	1.36%
Communications Services	-0.55%	6.40%	-2.97%	-2.97%	-9.00%	9.66%	12.44%	14.88%	9.67%	0.83%
Consumer Discretionary	-0.80%	6.98%	-4.40%	-4.40%	-17.60%	6.52%	3.20%	11.99%	10.75%	0.71%
Consumer Staples	-0.67%	6.77%	0.15%	0.15%	5.39%	17.51%	5.43%	10.86%	8.74%	2.23%
Energy	-0.13%	3.24%	-15.24%	-15.24%	-6.58%	-13.95%	3.60%	24.84%	3.80%	3.72%
Financials	0.23%	7.58%	-5.12%	-5.12%	-1.78%	20.41%	10.66%	19.19%	11.27%	1.57%
Health Care	-0.61%	3.48%	-5.63%	-5.63%	0.54%	0.99%	1.47%	9.13%	8.30%	1.74%
Industrials	-0.53%	8.52%	-3.62%	-3.62%	-3.80%	5.12%	9.96%	17.65%	10.18%	1.41%
Materials	-0.61%	9.03%	-5.50%	-5.50%	-2.84%	-7.41%	-0.94%	13.04%	7.13%	2.05%
Real Estate	0.25%	7.50%	-4.74%	-4.74%	-1.33%	12.81%	-3.08%	7.01%	6.23%	3.41%
Technology	0.34%	12.85%	-1.89%	-1.89%	-14.31%	7.24%	16.19%	21.84%	20.14%	0.71%
Utilities	0.05%	6.36%	-1.43%	-1.43%	3.44%	25.91%	4.00%	9.25%	9.32%	2.94%
DJIA	-0.38%	7.25%	-3.83%	-3.83%	-4.67%	8.87%	7.54%	13.63%	10.75%	1.74%
NASDAQ	-0.05%	10.19%	-2.73%	-2.73%	-12.72%	6.63%	8.85%	15.75%	13.31%	#N/A
Russell 3000	-0.13%	8.26%	-4.00%	-4.00%	-8.53%	7.13%	7.83%	15.49%	11.10%	1.36%
Russell 1000 Growth	-0.01%	9.97%	-2.39%	-2.39%	-12.12%	8.39%	11.29%	17.38%	14.60%	0.64%
Russell 1000 Value	-0.25%	6.56%	-5.47%	-5.47%	-3.45%	6.33%	4.78%	13.47%	7.94%	2.15%
Russell Midcap	-0.01%	7.84%	-5.08%	-5.08%	-8.31%	2.93%	3.42%	13.48%	8.08%	1.67%
Russell 2500	-0.02%	7.45%	-6.11%	-6.11%	-13.15%	-2.57%	0.51%	12.47%	6.61%	1.60%
Russell 2000	0.11%	6.96%	-6.38%	-6.38%	-15.25%	-3.38%	-0.62%	11.15%	5.39%	1.52%
MSCI AC World	0.33%	8.16%	-2.81%	-2.81%	-3.99%	8.02%	7.44%	13.73%	8.73%	1.83%
MSCI AC World ex USA	1.16%	7.72%	-1.06%	-1.06%	4.25%	8.02%	5.56%	10.55%	4.94%	2.70%
MSCI EAFE	1.32%	7.96%	-0.46%	-0.46%	6.51%	7.84%	7.44%	11.74%	5.52%	2.85%
MSCI Europe	1.30%	8.42%	-0.08%	-0.08%	10.54%	10.36%	8.67%	13.73%	5.96%	2.92%
MSCI Japan	1.62%	6.54%	-1.23%	-1.23%	-0.74%	-0.22%	7.46%	8.19%	5.13%	2.18%
MSCI EM (Emerging Markets)	0.95%	6.83%	-2.66%	-2.66%	0.27%	6.92%	1.81%	6.78%	3.17%	2.36%
MSCI EM Asia	1.12%	6.96%	-3.01%	-3.01%	-1.63%	8.15%	2.23%	6.27%	3.82%	1.97%
MSCI EM Eastern Europe	0.37%	7.35%	0.05%	0.05%	28.35%	24.94%	18.20%	-11.53%	-5.26%	#N/A
MSCI EM Latin America	0.15%	6.99%	-1.32%	-1.32%	11.33%	-10.79%	-0.91%	11.09%	2.11%	4.34%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.19%	-0.04%	-0.88%	-0.88%	1.88%	6.43%	1.16%	-0.89%	1.34%	4.73%
Bloomberg Municipal State GO (10 Y)	0.08%	0.03%	-1.47%	-1.47%	-1.45%	-0.45%	1.47%	0.40%	2.12%	3.85%
Barclays US High Yield	0.23%	1.28%	-1.51%	-1.51%	-0.52%	7.46%	5.07%	5.86%	4.72%	8.29%
Bloomberg Global Aggregate USD	0.19%	-0.05%	-0.89%	-0.89%	1.84%	6.45%	1.30%	-0.69%	1.43%	4.77%
Bbg EM Gov't Diversified	-0.09%	2.01%	1.24%	1.24%	4.74%	7.56%	2.74%	0.79%	0.96%	6.51%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.27%	7.28%	-5.56%	-5.56%	-2.81%	10.68%	-3.68%	7.04%	5.14%	3.99%
Alerian MLP	1.35%	7.96%	-8.83%	-8.83%	2.64%	16.87%	19.36%	33.53%	5.47%	6.79%
Bloomberg Commodity	0.13%	4.04%	-4.76%	-4.76%	3.70%	3.20%	-4.38%	13.32%	1.93%	
US Dollar Index	0.11%	-2.62%	-3.64%	-3.64%	-6.46%	-0.42%	4.79%	2.76%	2.09%	
Interest Rates	4/15/25	4/8/25	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	3.84%	3.71%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.98%	3.88%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.35%	4.26%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.53%	2.67%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.35%	1.23%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.42%	9.50%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.91%	6.65%	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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