



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-2.24%	-3.29%	-5.93%	-5.93%	-9.95%	5.84%	7.92%	15.22%	11.57%	1.39%
Communications Services	-2.48%	-5.66%	-5.38%	-5.38%	-11.25%	7.08%	11.49%	14.21%	9.44%	0.85%
Consumer Discretionary	-2.69%	-6.52%	-6.98%	-6.98%	-19.82%	4.20%	2.26%	10.95%	10.43%	0.73%
Consumer Staples	-1.15%	1.27%	-1.00%	-1.00%	4.18%	16.08%	5.02%	10.43%	8.58%	2.26%
Energy	0.83%	-3.13%	-14.53%	-14.53%	-5.80%	-12.48%	3.88%	26.06%	3.91%	3.69%
Financials	-1.56%	-1.58%	-6.60%	-6.60%	-3.31%	19.28%	10.07%	19.24%	11.09%	1.59%
Health Care	-1.00%	-1.81%	-6.58%	-6.58%	-0.47%	-0.04%	1.13%	8.44%	8.20%	1.76%
Industrials	-1.38%	-1.78%	-4.95%	-4.95%	-5.13%	3.88%	9.44%	17.52%	10.06%	1.43%
Materials	-0.77%	-0.40%	-6.23%	-6.23%	-3.60%	-7.44%	-1.20%	12.99%	7.09%	2.06%
Real Estate	-0.16%	1.50%	-4.89%	-4.89%	-1.48%	14.38%	-3.13%	7.11%	6.15%	3.41%
Technology	-3.94%	-5.04%	-5.76%	-5.76%	-17.69%	2.80%	14.63%	20.57%	19.70%	0.74%
Utilities	-0.93%	1.40%	-2.35%	-2.35%	2.47%	26.44%	3.67%	9.03%	9.28%	2.97%
DJIA	-1.73%	-2.30%	-5.50%	-5.50%	-6.32%	6.81%	6.91%	13.21%	10.56%	1.75%
NASDAQ	-3.07%	-4.77%	-5.72%	-5.72%	-15.39%	3.50%	7.72%	14.66%	12.97%	#N/A
Russell 3000	-2.10%	-3.23%	-6.01%	-6.01%	-10.45%	5.14%	7.06%	14.90%	10.88%	1.39%
Russell 1000 Growth	-3.03%	-4.63%	-5.35%	-5.35%	-14.78%	5.09%	10.14%	16.37%	14.25%	0.66%
Russell 1000 Value	-1.14%	-1.64%	-6.54%	-6.54%	-4.55%	5.69%	4.38%	13.29%	7.83%	2.18%
Russell Midcap	-1.25%	-2.03%	-6.27%	-6.27%	-9.46%	2.20%	2.98%	13.20%	7.96%	1.70%
Russell 2500	-1.09%	-2.75%	-7.13%	-7.13%	-14.10%	-3.19%	0.14%	12.29%	6.51%	1.62%
Russell 2000	-1.03%	-2.58%	-7.34%	-7.34%	-16.13%	-3.97%	-0.96%	11.03%	5.30%	1.54%
MSCI AC World	-1.49%	0.80%	-4.26%	-4.26%	-5.42%	7.23%	6.90%	13.36%	8.53%	1.82%
MSCI AC World ex USA	-0.22%	8.75%	-1.27%	-1.27%	4.02%	9.66%	5.47%	10.61%	4.84%	2.67%
MSCI EAFE	0.10%	10.36%	-0.36%	-0.36%	6.62%	9.78%	7.46%	11.86%	5.48%	2.82%
MSCI Europe	0.29%	11.25%	0.21%	0.21%	10.87%	12.27%	8.77%	13.78%	5.97%	2.88%
MSCI Japan	-0.56%	8.09%	-1.79%	-1.79%	-1.29%	1.37%	7.25%	8.38%	5.00%	2.23%
MSCI EM (Emerging Markets)	-1.04%	6.67%	-3.67%	-3.67%	-0.77%	7.99%	1.45%	6.64%	2.91%	2.33%
MSCI EM Asia	-1.36%	6.69%	-4.33%	-4.33%	-2.97%	8.87%	1.76%	6.03%	3.54%	1.95%
MSCI EM Eastern Europe	0.57%	10.03%	0.62%	0.62%	29.08%	29.79%	18.40%	-11.53%	-5.36%	#N/A
MSCI EM Latin America	-0.25%	4.02%	-1.58%	-1.58%	11.05%	-8.84%	-1.00%	11.24%	1.97%	4.34%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.32%	0.35%	-0.56%	-0.56%	2.21%	7.12%	1.27%	-0.86%	1.36%	4.67%
Bloomberg Municipal State GO (10 Y)	0.20%	2.07%	-1.27%	-1.27%	-1.25%	-0.13%	1.53%	0.47%	2.12%	3.81%
Barclays US High Yield	0.02%	0.98%	-1.49%	-1.49%	-0.50%	7.88%	5.07%	5.85%	4.72%	8.29%
Bloomberg Global Aggregate USD	0.32%	0.36%	-0.58%	-0.58%	2.16%	7.12%	1.40%	-0.67%	1.46%	4.72%
Bbg EM Gov't Diversified	0.33%	2.92%	1.58%	1.58%	5.08%	9.02%	2.85%	0.84%	0.92%	6.50%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.06%	1.25%	-5.61%	-5.61%	-2.87%	12.25%	-3.69%	7.29%	5.10%	4.00%
Alerian MLP	-0.24%	2.45%	-9.04%	-9.04%	2.40%	17.28%	19.24%	33.74%	5.47%	6.81%
Bloomberg Commodity	1.28%	2.84%	-3.54%	-3.54%	5.03%	4.47%	-3.97%	13.57%	1.97%	
US Dollar Index	-0.22%	-3.33%	-4.41%	-4.41%	-7.21%	-1.28%	4.51%	2.46%	2.10%	
Interest Rates	4/16/25	4/9/25	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	3.77%	3.91%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.91%	4.06%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.29%	4.34%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.50%	2.59%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.33%	1.33%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.39%	9.46%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.93%	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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