



| Equities | 1 Day | 1 Week | MTD | QTD | YTD | 1 Year | 3 Years | 5 Years | 10 Years | Yield |
|---|---------|---------|----------|----------|----------|----------|----------|----------|----------|-------|
| S&P 500 | 1.67% | 1.91% | -4.13% | -4.13% | -8.23% | 7.44% | 9.61% | 15.67% | 11.74% | 1.36% |
| Communications Services | 2.27% | 2.73% | -2.79% | -2.79% | -8.83% | 9.19% | 15.55% | 14.76% | 9.43% | 0.83% |
| Consumer Discretionary | 2.78% | 3.42% | -3.79% | -3.79% | -17.07% | 8.43% | 4.03% | 11.61% | 10.77% | 0.71% |
| Consumer Staples | -0.42% | 2.11% | 1.09% | 1.09% | 6.38% | 15.01% | 5.58% | 11.50% | 8.87% | 2.21% |
| Energy | -0.27% | 2.04% | -12.78% | -12.78% | -3.88% | -12.20% | 6.21% | 23.74% | 4.14% | 3.61% |
| Financials | 1.18% | 2.55% | -4.22% | -4.22% | -0.84% | 17.75% | 11.73% | 19.64% | 11.43% | 1.56% |
| Health Care | 0.54% | -0.45% | -7.00% | -7.00% | -0.91% | -2.27% | 2.21% | 8.31% | 8.04% | 1.76% |
| Industrials | 1.25% | 1.30% | -3.71% | -3.71% | -3.89% | 4.14% | 10.48% | 17.51% | 10.20% | 1.41% |
| Materials | 0.02% | 1.39% | -4.93% | -4.93% | -2.25% | -5.59% | 0.52% | 12.95% | 7.28% | 2.04% |
| Real Estate | 0.13% | 1.71% | -3.26% | -3.26% | 0.20% | 14.88% | -2.98% | 7.81% | 6.34% | 3.35% |
| Technology | 2.92% | 1.89% | -3.98% | -3.98% | -16.13% | 7.68% | 16.33% | 21.39% | 19.74% | 0.73% |
| Utilities | 0.41% | 1.75% | -0.65% | -0.65% | 4.26% | 21.70% | 5.10% | 9.67% | 9.36% | 2.92% |
| DJIA | 1.07% | -0.12% | -5.61% | -5.61% | -6.43% | 4.69% | 7.52% | 13.19% | 10.57% | 1.80% |
| NASDAQ | 2.50% | 2.46% | -3.40% | -3.40% | -13.31% | 7.17% | 10.01% | 15.32% | 13.13% | #N/A |
| Russell 3000 | 1.67% | 2.05% | -4.09% | -4.09% | -8.62% | 6.67% | 8.85% | 15.30% | 11.06% | 1.36% |
| Russell 1000 Growth | 2.39% | 2.38% | -3.10% | -3.10% | -12.76% | 8.54% | 12.43% | 17.02% | 14.43% | 0.64% |
| Russell 1000 Value | 0.89% | 1.61% | -5.04% | -5.04% | -3.01% | 5.03% | 5.65% | 13.47% | 8.00% | 2.14% |
| Russell Midcap | 1.31% | 2.59% | -3.84% | -3.84% | -7.11% | 3.33% | 4.79% | 13.51% | 8.20% | 1.65% |
| Russell 2500 | 1.49% | 2.69% | -4.63% | -4.63% | -11.79% | -2.20% | 2.00% | 12.35% | 6.78% | 1.58% |
| Russell 2000 | 1.53% | 3.00% | -4.57% | -4.57% | -13.61% | -2.84% | 1.10% | 11.02% | 5.62% | 1.49% |
| MSCI AC World | 1.50% | 2.21% | -2.14% | -2.14% | -3.34% | 8.68% | 8.64% | 13.72% | 8.73% | 1.83% |
| MSCI AC World ex USA | 1.18% | 2.62% | 1.32% | 1.32% | 6.75% | 10.74% | 7.18% | 10.89% | 5.08% | 2.62% |
| MSCI EAFE | 0.84% | 2.28% | 1.91% | 1.91% | 9.05% | 10.37% | 8.82% | 12.07% | 5.68% | 2.75% |
| MSCI Europe | 0.65% | 1.85% | 2.06% | 2.06% | 12.92% | 11.27% | 9.91% | 13.66% | 6.14% | 2.81% |
| MSCI Japan | 0.97% | 3.27% | 1.42% | 1.42% | 1.93% | 6.26% | 8.95% | 9.04% | 5.17% | 2.16% |
| MSCI EM (Emerging Markets) | 2.08% | 3.54% | -0.26% | -0.26% | 2.74% | 10.71% | 3.79% | 7.20% | 3.25% | 2.30% |
| MSCI EM Asia | 2.31% | 3.65% | -0.84% | -0.84% | 0.57% | 11.85% | 4.11% | 6.57% | 3.87% | 1.94% |
| MSCI EM Eastern Europe | 2.06% | 5.78% | 6.43% | 6.43% | 36.54% | 30.06% | 22.12% | -11.06% | -4.68% | #N/A |
| MSCI EM Latin America | 2.13% | 6.33% | 4.65% | 4.65% | 18.07% | -5.70% | 2.68% | 12.99% | 2.50% | 4.19% |
| Fixed Income | 1 Day | 1 Week | MTD | QTD | YTD | 1 Year | 3 Years | 5 Years | 10 Years | Yield |
| Bloomberg US Aggregate | 0.20% | -0.40% | -0.95% | -0.95% | 1.80% | 6.12% | 1.49% | -0.93% | 1.35% | 4.75% |
| Bloomberg Municipal State GO (10 Y) | 0.57% | 0.03% | -1.24% | -1.24% | -1.23% | -0.02% | 1.93% | 0.71% | 2.12% | 3.82% |
| Barclays US High Yield | 0.68% | 1.04% | -0.47% | -0.47% | 0.53% | 8.21% | 5.74% | 6.33% | 4.82% | 8.01% |
| Bloomberg Global Aggregate USD | 0.21% | -0.36% | -0.94% | -0.94% | 1.80% | 6.18% | 1.63% | -0.73% | 1.45% | 4.79% |
| Bbg EM Gov't Diversified | 0.08% | 0.85% | 2.44% | 2.44% | 5.98% | 8.95% | 3.73% | 0.99% | 1.01% | 6.42% |
| Other | 1 Day | 1 Week | MTD | QTD | YTD | 1 Year | 3 Years | 5 Years | 10 Years | Yield |
| FTSE NAREIT | 0.04% | 1.55% | -4.15% | -4.15% | -1.37% | 11.96% | -3.51% | 7.96% | 5.24% | 3.92% |
| Alerian MLP | 0.50% | 1.40% | -7.77% | -7.77% | 3.83% | 13.75% | 20.36% | 29.78% | 5.47% | 6.71% |
| Bloomberg Commodity | -0.58% | -0.23% | -3.76% | -3.76% | 4.79% | 4.01% | -3.22% | 13.99% | 2.02% | |
| US Dollar Index | 1.63% | 0.55% | -3.89% | -3.89% | -6.70% | -0.29% | 4.39% | 2.49% | 2.17% | |
| Interest Rates | 4/23/25 | 4/16/25 | 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 | 3.81% | 3.77% | 4.25% | 4.23% | 4.41% | 0.73% | 0.13% | 1.58% | 2.48% | |
| US Treasury Constant Maturity - 5 Year | 4.00% | 3.91% | 4.38% | 3.84% | 3.99% | 1.26% | 0.36% | 1.69% | 2.51% | |
| US Treasury Constant Maturity - 10 Year | 4.40% | 4.29% | 4.58% | 3.88% | 3.88% | 1.52% | 0.93% | 1.92% | 2.69% | |
| Germany Benchmark Bond - 10 Year | 2.51% | 2.50% | 2.35% | 1.94% | 2.53% | -0.18% | -0.58% | -0.19% | 0.24% | |
| Japan Benchmark Bond - 10 Year | 1.32% | 1.33% | 1.09% | 0.59% | 0.42% | 0.07% | 0.02% | -0.02% | 0.01% | |
| Mexico Benchmark Bond - 10 Year | 9.43% | 9.38% | 10.41% | 8.95% | 9.02% | 7.56% | 5.55% | 6.84% | 8.71% | |
| 30 Year Fixed-Rate Mortgages, Average, US | 6.90% | 6.93% | 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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