



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.07%	7.19%	-1.41%	-1.41%	-5.62%	9.84%	10.51%	15.78%	12.04%	1.33%
Communications Services	0.05%	8.81%	0.51%	0.51%	-5.73%	12.41%	17.07%	15.59%	9.66%	0.80%
Consumer Discretionary	-0.09%	10.52%	0.21%	0.21%	-13.62%	11.13%	6.20%	12.00%	11.21%	0.68%
Consumer Staples	-0.14%	-0.17%	-0.25%	-0.25%	4.96%	12.97%	4.90%	10.78%	8.78%	2.24%
Energy	0.63%	4.39%	-11.05%	-11.05%	-1.96%	-10.09%	6.49%	23.11%	4.35%	3.54%
Financials	0.33%	5.58%	-3.24%	-3.24%	0.17%	19.93%	12.57%	18.49%	11.54%	1.54%
Health Care	0.37%	4.54%	-5.02%	-5.02%	1.20%	0.69%	2.94%	8.64%	8.46%	1.72%
Industrials	0.31%	5.68%	-1.23%	-1.23%	-1.42%	7.15%	11.69%	16.91%	10.50%	1.38%
Materials	0.15%	3.84%	-3.56%	-3.56%	-0.85%	-5.57%	0.60%	11.90%	7.24%	2.01%
Real Estate	0.68%	3.05%	-2.48%	-2.48%	1.01%	15.86%	-2.46%	7.28%	6.43%	3.33%
Technology	-0.30%	10.62%	0.73%	0.73%	-12.01%	10.70%	17.07%	22.17%	20.13%	0.69%
Utilities	0.70%	3.70%	-0.14%	-0.14%	4.79%	22.64%	5.67%	9.33%	9.36%	2.91%
DJIA	0.28%	5.39%	-4.13%	-4.13%	-4.96%	7.06%	7.98%	12.99%	10.71%	1.76%
NASDAQ	-0.10%	9.42%	0.41%	0.41%	-9.90%	9.77%	11.36%	15.90%	13.57%	#N/A
Russell 3000	0.11%	7.26%	-1.34%	-1.34%	-6.00%	9.18%	9.80%	15.30%	11.39%	1.32%
Russell 1000 Growth	-0.13%	9.65%	1.02%	1.02%	-9.05%	11.82%	13.61%	17.68%	14.93%	0.62%
Russell 1000 Value	0.35%	4.70%	-3.72%	-3.72%	-1.67%	6.78%	6.28%	12.84%	8.13%	2.11%
Russell Midcap	0.43%	6.64%	-1.52%	-1.52%	-4.87%	5.61%	5.78%	12.94%	8.56%	1.62%
Russell 2500	0.47%	6.90%	-2.20%	-2.20%	-9.53%	0.26%	3.10%	11.54%	7.14%	1.54%
Russell 2000	0.41%	6.81%	-2.25%	-2.25%	-11.52%	-0.47%	2.31%	10.07%	5.97%	1.46%
MSCI AC World	0.30%	5.70%	0.19%	0.19%	-1.03%	10.60%	9.81%	13.73%	8.91%	1.77%
MSCI AC World ex USA	0.71%	2.99%	2.80%	2.80%	8.31%	11.74%	8.69%	10.72%	5.08%	2.57%
MSCI EAFE	0.82%	2.96%	3.77%	3.77%	11.04%	12.45%	10.68%	11.92%	5.71%	2.71%
MSCI Europe	0.58%	2.59%	3.70%	3.70%	14.73%	12.95%	11.82%	13.43%	6.15%	2.77%
MSCI Japan	1.67%	4.02%	4.38%	4.38%	4.90%	10.16%	10.92%	9.20%	5.38%	2.12%
MSCI EM (Emerging Markets)	0.50%	2.91%	0.36%	0.36%	3.37%	8.99%	4.71%	7.07%	3.18%	2.25%
MSCI EM Asia	0.54%	2.65%	-0.47%	-0.47%	0.94%	9.41%	4.87%	6.42%	3.85%	1.90%
MSCI EM Eastern Europe	0.17%	5.21%	8.13%	8.13%	38.71%	32.53%	25.46%	-10.77%	-4.60%	#N/A
MSCI EM Latin America	0.36%	6.61%	7.26%	7.26%	21.02%	-4.60%	5.45%	13.16%	2.46%	3.63%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.29%	1.53%	0.19%	0.19%	2.98%	7.67%	1.71%	-0.70%	1.48%	4.56%
Bloomberg Municipal State GO (10 Y)	0.06%	0.45%	-0.98%	-0.98%	-0.97%	0.64%	2.03%	0.93%	2.12%	3.78%
Bardays US High Yield	0.06%	1.72%	0.17%	0.17%	1.17%	8.98%	6.13%	6.53%	4.87%	7.82%
Bloomberg Global Aggregate USD	0.29%	1.50%	0.18%	0.18%	2.95%	7.69%	1.86%	-0.51%	1.57%	4.60%
Bbg EM Gov't Diversified	0.06%	0.26%	2.73%	2.73%	6.27%	9.58%	4.62%	1.03%	0.90%	6.42%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.80%	2.96%	-3.25%	-3.25%	-0.44%	13.74%	-2.99%	7.16%	5.35%	3.87%
Alerian MLP	0.27%	5.06%	-6.02%	-6.02%	5.81%	15.41%	21.49%	29.32%	5.47%	6.59%
Bloomberg Commodity	0.51%	1.01%	-2.77%	-2.77%	5.86%	5.06%	-2.93%	14.65%	2.07%	
US Dollar Index	-0.48%	0.81%	-4.66%	-4.66%	-7.44%	-1.43%	3.30%	2.45%	2.23%	
Interest Rates	4/28/25	4/21/25	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	3.67%	3.75%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.81%	3.97%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.23%	4.42%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.51%	2.47%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.32%	1.28%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.20%	9.50%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.86%	6.90%	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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