



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.63%	2.22%	1.47%	0.78%	-3.52%	11.65%	12.55%	16.24%	12.42%	1.30%
Communications Services	-0.06%	4.08%	3.84%	4.61%	-1.88%	17.62%	19.14%	15.52%	10.31%	0.77%
Consumer Discretionary	-1.32%	0.33%	0.86%	0.54%	-13.34%	9.74%	9.26%	12.30%	11.38%	0.68%
Consumer Staples	0.02%	1.34%	-0.15%	1.08%	6.37%	14.01%	6.76%	11.65%	9.01%	2.20%
Energy	-1.98%	-3.18%	-0.26%	-13.88%	-5.08%	-10.00%	3.83%	21.68%	4.09%	3.66%
Financials	-0.73%	2.54%	1.32%	-0.78%	2.71%	23.67%	14.32%	20.04%	11.80%	1.50%
Health Care	-0.35%	-0.40%	-1.76%	-5.40%	0.79%	-0.29%	3.72%	8.47%	8.58%	1.73%
Industrials	-0.03%	3.99%	2.51%	2.71%	2.51%	11.29%	13.78%	18.79%	11.08%	1.33%
Materials	-0.66%	1.94%	0.49%	-1.69%	1.07%	-3.74%	1.64%	12.77%	7.50%	1.93%
Real Estate	-0.15%	2.60%	1.28%	0.06%	3.64%	17.03%	0.97%	8.47%	7.22%	3.20%
Technology	-0.85%	3.44%	2.53%	4.20%	-8.99%	12.80%	20.01%	22.12%	20.79%	0.67%
Utilities	-0.28%	1.01%	0.77%	0.86%	5.85%	19.77%	6.92%	10.44%	9.75%	2.88%
DJIA	-0.24%	2.46%	1.35%	-1.77%	-2.62%	8.46%	9.85%	13.74%	11.09%	1.71%
NASDAQ	-0.74%	2.76%	2.29%	3.18%	-7.41%	11.19%	14.02%	16.00%	14.14%	#N/A
Russell 3000	-0.60%	2.27%	1.57%	0.89%	-3.87%	10.94%	11.87%	15.79%	11.80%	1.29%
Russell 1000 Growth	-0.67%	2.80%	2.04%	3.85%	-6.50%	13.77%	16.53%	17.77%	15.43%	0.60%
Russell 1000 Value	-0.50%	1.66%	0.95%	-2.13%	-0.04%	8.52%	7.58%	13.79%	8.41%	2.08%
Russell Midcap	-0.27%	2.39%	1.88%	0.83%	-2.60%	7.73%	7.61%	13.77%	8.99%	1.57%
Russell 2500	-0.48%	2.31%	2.17%	0.06%	-7.44%	1.36%	4.64%	12.28%	7.64%	1.49%
Russell 2000	-0.81%	2.00%	2.06%	-0.30%	-9.75%	-0.19%	3.83%	10.93%	6.56%	1.41%
MSCI AC World	-0.33%	2.36%	1.56%	2.55%	1.30%	12.13%	11.52%	14.32%	9.34%	1.71%
MSCI AC World ex USA	0.12%	2.57%	1.68%	5.44%	11.09%	12.77%	9.79%	11.51%	5.56%	2.54%
MSCI EAFE	0.02%	2.37%	1.48%	6.24%	13.68%	13.24%	11.84%	12.73%	6.19%	2.67%
MSCI Europe	0.05%	2.64%	1.82%	6.44%	17.76%	15.37%	13.34%	14.38%	6.62%	2.74%
MSCI Japan	0.16%	1.08%	0.26%	5.51%	6.04%	6.40%	11.12%	9.65%	5.88%	2.09%
MSCI EM (Emerging Markets)	0.57%	3.45%	2.44%	3.82%	6.94%	10.50%	5.72%	7.96%	3.71%	2.18%
MSCI EM Asia	0.83%	4.36%	3.07%	3.87%	5.35%	11.76%	5.95%	7.56%	4.51%	1.83%
MSCI EM Eastern Europe	-0.44%	-0.37%	1.82%	7.73%	38.21%	31.02%	27.57%	-11.22%	-4.86%	#N/A
MSCI EM Latin America	-0.91%	-0.93%	-0.66%	6.26%	19.89%	-7.00%	6.21%	12.84%	2.44%	3.60%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.14%	-0.72%	-0.92%	-0.53%	2.24%	5.67%	1.88%	-0.80%	1.50%	4.69%
Bloomberg Municipal State GO (10 Y)	-0.08%	0.62%	0.12%	-0.37%	-0.35%	0.63%	2.42%	0.95%	2.12%	3.68%
Barclays US High Yield	0.01%	0.22%	0.40%	0.38%	1.39%	8.08%	6.57%	6.38%	4.90%	7.77%
Bloomberg Global Aggregate USD	-0.13%	-0.69%	-0.89%	-0.51%	2.23%	5.74%	2.03%	-0.62%	1.59%	4.73%
Bbg EM Gov't Diversified	-0.03%	1.06%	0.49%	3.82%	7.40%	9.15%	5.21%	0.95%	1.14%	6.40%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.29%	2.19%	0.98%	-1.13%	1.75%	14.31%	0.11%	8.26%	6.04%	3.76%
Alerian MLP	-2.25%	-4.55%	-1.60%	-10.29%	0.99%	10.56%	19.05%	27.34%	3.87%	7.28%
Bloomberg Commodity	-0.24%	-1.79%	0.31%	-4.51%	3.96%	4.68%	-4.31%	13.25%	1.63%	
US Dollar Index	-0.22%	0.92%	0.40%	-3.78%	-6.59%	0.23%	3.56%	2.67%	2.42%	
Interest Rates	5/5/25	4/28/25	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	3.83%	3.67%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.95%	3.81%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.36%	4.23%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.52%	2.51%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.26%	1.32%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.24%	9.25%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.80%	6.86%	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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