



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.44%	1.13%	1.13%	0.44%	-3.85%	9.98%	12.61%	16.05%	12.38%	1.31%
Communications Services	-1.84%	1.41%	1.41%	2.18%	-4.17%	12.69%	18.70%	14.72%	10.17%	0.78%
Consumer Discretionary	1.02%	1.02%	1.02%	0.70%	-13.20%	9.36%	9.78%	11.96%	11.39%	0.68%
Consumer Staples	0.20%	-0.12%	-0.12%	1.12%	6.41%	12.73%	6.78%	11.99%	8.97%	2.21%
Energy	0.08%	-0.07%	-0.07%	-13.71%	-4.89%	-10.43%	2.91%	21.78%	4.25%	3.66%
Financials	0.62%	1.42%	1.42%	-0.68%	2.81%	21.97%	14.61%	20.08%	11.79%	1.51%
Health Care	0.81%	-3.69%	-3.69%	-7.26%	-1.19%	-3.45%	3.13%	8.25%	8.36%	1.78%
Industrials	0.51%	2.15%	2.15%	2.35%	2.16%	9.53%	13.87%	18.76%	10.99%	1.34%
Materials	-0.50%	-0.67%	-0.67%	-2.83%	-0.10%	-6.53%	1.71%	12.45%	7.32%	1.94%
Real Estate	-0.02%	0.55%	0.55%	-0.65%	2.91%	15.00%	1.07%	8.53%	7.01%	3.22%
Technology	0.91%	2.81%	2.81%	4.48%	-8.74%	12.03%	20.39%	21.64%	20.83%	0.67%
Utilities	0.31%	2.32%	2.32%	2.42%	7.47%	19.70%	7.17%	11.45%	9.93%	2.84%
DJIA	0.70%	1.09%	1.09%	-2.02%	-2.87%	7.60%	9.85%	13.67%	11.05%	1.72%
NASDAQ	0.27%	1.68%	1.68%	2.57%	-7.96%	9.34%	14.30%	15.41%	14.05%	#N/A
Russell 3000	0.42%	1.20%	1.20%	0.53%	-4.22%	9.25%	12.00%	15.55%	11.74%	1.30%
Russell 1000 Growth	0.32%	1.43%	1.43%	3.23%	-7.06%	11.63%	16.72%	17.30%	15.35%	0.61%
Russell 1000 Value	0.54%	0.88%	0.88%	-2.19%	-0.10%	7.38%	7.66%	13.84%	8.41%	2.09%
Russell Midcap	0.67%	1.65%	1.65%	0.60%	-2.83%	6.23%	8.00%	13.49%	8.93%	1.59%
Russell 2500	0.42%	1.77%	1.77%	-0.33%	-7.81%	-0.34%	5.02%	11.91%	7.54%	1.51%
Russell 2000	0.33%	1.32%	1.32%	-1.02%	-10.41%	-2.30%	4.16%	10.60%	6.39%	1.44%
MSCI AC World	0.26%	1.31%	1.31%	2.30%	1.05%	10.57%	11.78%	14.17%	9.35%	1.72%
MSCI AC World ex USA	-0.02%	1.64%	1.64%	5.39%	11.04%	11.44%	10.28%	11.49%	5.64%	2.49%
MSCI EAFE	-0.15%	1.37%	1.37%	6.12%	13.56%	11.65%	12.15%	12.70%	6.21%	2.62%
MSCI Europe	-0.28%	1.36%	1.36%	5.96%	17.23%	12.79%	13.64%	14.24%	6.55%	2.68%
MSCI Japan	-0.05%	0.86%	0.86%	6.14%	6.67%	7.39%	11.02%	9.84%	5.98%	2.06%
MSCI EM (Emerging Markets)	0.00%	2.27%	2.27%	3.64%	6.76%	9.60%	6.57%	7.90%	3.92%	2.17%
MSCI EM Asia	0.00%	2.80%	2.80%	3.59%	5.07%	10.80%	6.95%	7.35%	4.75%	1.81%
MSCI EM Eastern Europe	1.47%	1.74%	1.74%	7.65%	38.09%	26.90%	27.79%	-11.04%	-4.84%	#N/A
MSCI EM Latin America	0.13%	-0.35%	-0.35%	6.60%	20.27%	-7.56%	6.58%	13.84%	2.62%	4.06%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.20%	-0.51%	-0.51%	-0.12%	2.66%	5.76%	2.15%	-0.74%	1.55%	4.63%
Bloomberg Municipal State GO (10 Y)	0.17%	0.31%	0.31%	-0.18%	-0.17%	0.50%	2.55%	0.91%	2.12%	3.65%
Barclays US High Yield	0.08%	0.43%	0.43%	0.41%	1.41%	7.90%	6.80%	6.32%	4.93%	7.77%
Bloomberg Global Aggregate USD	0.19%	-0.50%	-0.50%	-0.11%	2.64%	5.81%	2.30%	-0.56%	1.64%	4.67%
Bbg EM Gov't Diversified	0.15%	0.55%	0.55%	3.89%	7.47%	8.47%	5.44%	1.07%	1.18%	6.41%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.04%	0.40%	0.40%	-1.70%	1.16%	12.61%	0.26%	8.23%	5.86%	3.79%
Alerian MLP	1.72%	-0.65%	-0.65%	-9.44%	1.96%	10.55%	19.05%	28.34%	3.87%	7.34%
Bloomberg Commodity	-0.76%	0.66%	0.66%	-4.18%	4.32%	3.75%	-3.69%	13.44%	1.82%	
US Dollar Index	-0.15%	0.26%	0.26%	-3.92%	-6.73%	-0.33%	3.54%	2.61%	2.46%	
Interest Rates	5/7/25	4/30/25	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	3.78%	3.60%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.87%	3.72%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.26%	4.17%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.48%	2.45%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.28%	1.31%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.19%	9.20%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.82%	6.85%	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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