



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	3.27%	3.46%	4.98%	4.27%	-0.18%	13.36%	15.86%	17.00%	12.74%	1.25%
Communications Services	3.35%	0.91%	4.78%	5.57%	-0.99%	16.34%	21.08%	15.52%	10.51%	0.77%
Consumer Discretionary	5.67%	7.95%	8.87%	8.53%	-6.45%	18.22%	15.39%	13.76%	12.17%	0.62%
Consumer Staples	0.07%	-0.96%	-1.11%	0.11%	5.34%	10.34%	6.83%	11.50%	8.83%	2.23%
Energy	2.47%	5.05%	4.78%	-9.52%	-0.28%	-6.79%	6.64%	22.76%	4.73%	3.49%
Financials	2.03%	2.93%	4.29%	2.13%	5.72%	23.45%	17.62%	21.35%	12.03%	1.46%
Health Care	2.43%	-1.55%	-3.28%	-6.86%	-0.77%	-3.74%	3.96%	8.19%	8.28%	1.77%
Industrials	3.07%	4.20%	6.82%	7.02%	6.82%	13.29%	17.07%	20.22%	11.38%	1.28%
Materials	1.92%	2.20%	2.71%	0.47%	3.30%	-4.11%	4.23%	13.36%	7.67%	1.89%
Real Estate	0.04%	-0.58%	0.69%	-0.51%	3.05%	14.01%	3.31%	9.37%	6.99%	3.21%
Technology	4.69%	5.87%	8.55%	10.31%	-3.65%	17.68%	25.46%	22.97%	21.43%	0.63%
Utilities	-0.64%	0.25%	1.01%	1.11%	6.10%	15.32%	7.52%	11.03%	9.81%	2.86%
DJIA	2.82%	2.92%	4.31%	1.10%	0.23%	9.22%	12.33%	14.48%	11.30%	1.71%
NASDAQ	4.36%	4.87%	7.26%	8.20%	-2.90%	15.23%	18.94%	16.58%	14.59%	0.70%
Russell 3000	3.29%	3.60%	5.23%	4.53%	-0.41%	12.88%	15.38%	16.54%	12.12%	1.25%
Russell 1000 Growth	4.24%	4.31%	6.44%	8.32%	-2.48%	16.78%	21.18%	18.40%	15.83%	0.60%
Russell 1000 Value	2.15%	2.68%	3.65%	0.49%	2.64%	9.07%	9.94%	14.67%	8.64%	2.07%
Russell Midcap	2.82%	3.94%	5.90%	4.80%	1.24%	9.77%	11.31%	14.63%	9.32%	1.51%
Russell 2500	3.61%	4.83%	7.11%	4.90%	-2.97%	4.39%	8.85%	13.23%	8.03%	1.42%
Russell 2000	3.43%	4.41%	6.56%	4.10%	-5.77%	2.96%	7.91%	11.84%	6.86%	1.37%
MSCI AC World	2.21%	2.36%	3.95%	4.97%	3.69%	12.80%	14.43%	14.63%	9.53%	1.72%
MSCI AC World ex USA	0.30%	0.28%	1.97%	5.73%	11.40%	11.34%	11.76%	11.18%	5.54%	2.50%
MSCI EAFE	-0.52%	-0.57%	0.90%	5.63%	13.03%	10.61%	13.16%	12.17%	5.99%	2.64%
MSCI Europe	-0.14%	-0.55%	1.26%	5.86%	17.12%	11.15%	14.67%	13.83%	6.34%	2.70%
MSCI Japan	-1.99%	-1.24%	-0.99%	4.19%	4.72%	7.46%	11.48%	8.83%	5.65%	2.07%
MSCI EM (Emerging Markets)	2.07%	2.00%	4.49%	5.90%	9.08%	11.60%	8.89%	8.06%	4.10%	2.18%
MSCI EM Asia	2.57%	2.14%	5.27%	6.09%	7.60%	12.93%	9.38%	7.58%	4.96%	1.82%
MSCI EM Eastern Europe	-1.27%	1.13%	2.97%	8.95%	39.77%	28.91%	30.47%	-11.13%	-4.78%	#N/A
MSCI EM Latin America	-0.27%	2.26%	1.58%	8.66%	22.60%	-4.98%	7.71%	14.07%	2.77%	3.99%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.39%	-0.42%	-1.34%	-0.95%	1.81%	5.13%	1.44%	-0.84%	1.49%	4.80%
Bloomberg Municipal State GO (10 Y)	-0.06%	0.26%	0.38%	-0.11%	-0.09%	0.54%	2.65%	0.83%	2.12%	3.64%
Barclays US High Yield	0.75%	0.89%	1.30%	1.28%	2.30%	9.05%	7.59%	6.38%	5.02%	7.48%
Bloomberg Global Aggregate USD	-0.37%	-0.40%	-1.29%	-0.91%	1.82%	5.21%	1.62%	-0.66%	1.59%	4.83%
Bbg EM Gov't Diversified	-0.38%	-0.43%	0.06%	3.38%	6.95%	8.14%	5.78%	0.74%	1.16%	6.43%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.32%	0.02%	1.00%	-1.11%	1.76%	12.28%	2.42%	9.19%	5.91%	3.72%
Alerian MLP	1.30%	3.13%	1.49%	-7.49%	4.16%	13.14%	22.94%	28.38%	3.87%	7.11%
Bloomberg Commodity	-0.43%	1.18%	1.49%	-3.39%	5.19%	4.31%	-2.64%	13.79%	1.75%	
US Dollar Index	1.45%	2.07%	2.48%	-1.79%	-4.66%	1.95%	3.91%	3.06%	2.70%	
Interest Rates	5/9/25	5/2/25	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	3.88%	3.83%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.00%	3.92%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.37%	4.33%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.55%	2.52%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.35%	1.26%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.23%	9.24%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.84%	6.80%	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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