



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.11%	4.68%	5.86%	5.14%	0.65%	13.76%	15.25%	17.33%	12.71%	1.25%
Communications Services	1.58%	6.28%	7.78%	8.59%	1.85%	19.30%	21.19%	16.32%	10.74%	0.77%
Consumer Discretionary	0.38%	9.71%	10.83%	10.48%	-4.77%	20.07%	14.51%	14.15%	12.39%	0.62%
Consumer Staples	-0.34%	-2.56%	-2.68%	-1.48%	3.68%	9.11%	5.76%	11.41%	8.50%	2.28%
Energy	-0.59%	5.61%	5.54%	-8.87%	0.44%	-6.03%	5.72%	23.79%	4.83%	3.41%
Financials	-0.28%	2.95%	4.42%	2.25%	5.85%	23.51%	17.11%	21.48%	11.93%	1.46%
Health Care	-2.31%	-4.80%	-8.31%	-11.71%	-5.93%	-9.04%	1.76%	7.04%	7.56%	1.87%
Industrials	-0.47%	4.82%	7.08%	7.29%	7.08%	14.07%	16.64%	20.64%	11.28%	1.29%
Materials	-0.96%	1.87%	1.19%	-1.01%	1.77%	-5.53%	3.18%	13.24%	7.42%	1.96%
Real Estate	-0.86%	-2.02%	-1.47%	-2.65%	0.83%	10.48%	1.71%	9.22%	6.65%	3.31%
Technology	0.96%	8.99%	12.06%	13.88%	-0.53%	19.77%	25.34%	23.86%	21.55%	0.62%
Utilities	-0.45%	-1.78%	0.49%	0.59%	5.56%	14.41%	6.91%	10.86%	9.73%	2.92%
DJIA	-0.21%	2.32%	3.44%	0.26%	-0.61%	8.18%	11.46%	14.42%	11.09%	1.68%
NASDAQ	0.72%	7.96%	9.78%	10.74%	-0.63%	16.71%	18.35%	17.27%	14.68%	#N/A
Russell 3000	0.05%	4.79%	6.05%	5.34%	0.37%	13.14%	14.66%	16.91%	12.09%	1.25%
Russell 1000 Growth	0.71%	7.29%	8.83%	10.76%	-0.28%	18.65%	20.65%	19.05%	15.95%	0.57%
Russell 1000 Value	-0.64%	1.89%	2.79%	-0.34%	1.78%	7.79%	9.00%	14.70%	8.46%	2.05%
Russell Midcap	-0.34%	4.49%	6.21%	5.11%	1.54%	9.61%	10.31%	15.00%	9.26%	1.52%
Russell 2500	-0.54%	5.24%	7.10%	4.89%	-2.97%	3.24%	7.69%	13.79%	7.92%	1.43%
Russell 2000	-0.88%	4.76%	6.14%	3.69%	-6.14%	1.27%	6.67%	12.42%	6.71%	1.38%
MSCI AC World	0.34%	3.64%	4.99%	6.02%	4.72%	13.34%	13.94%	15.22%	9.53%	1.67%
MSCI AC World ex USA	0.71%	1.50%	3.16%	6.97%	12.71%	11.99%	11.52%	12.08%	5.55%	2.48%
MSCI EAFE	0.38%	0.77%	2.15%	6.94%	14.43%	11.38%	12.95%	13.27%	5.99%	2.64%
MSCI Europe	0.24%	0.70%	2.07%	6.70%	18.05%	11.18%	14.22%	15.08%	6.25%	2.70%
MSCI Japan	0.73%	0.46%	1.33%	6.63%	7.17%	10.09%	11.97%	9.74%	5.90%	2.08%
MSCI EM (Emerging Markets)	1.48%	3.24%	5.58%	7.00%	10.21%	11.78%	8.65%	8.48%	4.14%	2.14%
MSCI EM Asia	1.79%	3.40%	6.29%	7.12%	8.64%	12.80%	9.07%	7.91%	5.01%	1.79%
MSCI EM Eastern Europe	0.56%	3.07%	4.86%	10.95%	42.33%	28.62%	29.81%	-10.23%	-4.55%	#N/A
MSCI EM Latin America	0.49%	4.76%	4.40%	11.68%	26.00%	-2.53%	8.13%	15.18%	2.95%	3.86%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.28%	-1.17%	-1.68%	-1.29%	1.45%	4.38%	1.45%	-0.98%	1.45%	4.86%
Bloomberg Municipal State GO (10 Y)	0.01%	0.12%	0.43%	-0.06%	-0.05%	0.72%	2.74%	0.75%	2.12%	3.64%
Barclays US High Yield	-0.14%	0.97%	1.40%	1.38%	2.40%	9.10%	7.57%	6.60%	5.01%	7.49%
Bloomberg Global Aggregate USD	-0.26%	-1.12%	-1.61%	-1.23%	1.49%	4.49%	1.64%	-0.79%	1.54%	4.89%
Bbg EM Gov't Diversified	0.13%	-0.44%	0.11%	3.43%	7.00%	7.94%	5.78%	0.87%	1.04%	6.46%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.93%	-1.52%	-1.13%	-3.19%	-0.38%	8.57%	0.84%	9.14%	5.59%	3.86%
Alerian MLP	0.22%	5.08%	4.39%	-4.84%	7.13%	16.59%	22.59%	29.47%	3.87%	6.97%
Bloomberg Commodity	-0.80%	0.96%	1.62%	-3.27%	5.32%	4.05%	-2.89%	13.92%	1.69%	
US Dollar Index	-0.71%	1.49%	1.75%	-2.49%	-5.34%	1.47%	3.75%	2.80%	2.75%	
Interest Rates	5/14/25	5/7/25	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	4.05%	3.78%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.17%	3.87%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.53%	4.26%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.68%	2.48%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.45%	1.28%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.32%	9.20%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.84%	6.82%	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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