



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.44%	4.53%	6.32%	5.60%	1.09%	12.92%	15.39%	17.34%	12.75%	1.25%
Communications Services	-0.42%	5.20%	7.32%	8.13%	1.42%	17.73%	20.99%	15.94%	10.67%	0.77%
Consumer Discretionary	-0.67%	7.52%	10.08%	9.73%	-5.41%	19.25%	14.24%	13.75%	12.23%	0.62%
Consumer Staples	2.01%	-0.12%	-0.72%	0.50%	5.76%	11.26%	6.45%	11.69%	8.68%	2.28%
Energy	0.42%	4.74%	5.98%	-8.49%	0.86%	-5.80%	5.86%	23.95%	4.83%	3.41%
Financials	0.64%	2.88%	5.09%	2.90%	6.53%	23.41%	17.34%	21.81%	12.05%	1.46%
Health Care	1.28%	-2.70%	-7.14%	-10.58%	-4.73%	-9.20%	2.19%	7.15%	7.67%	1.87%
Industrials	1.12%	4.60%	8.28%	8.49%	8.28%	14.62%	17.05%	20.98%	11.41%	1.29%
Materials	1.16%	1.83%	2.36%	0.13%	2.95%	-4.60%	3.57%	13.28%	7.49%	1.96%
Real Estate	1.84%	0.32%	0.33%	-0.87%	2.68%	10.64%	2.32%	9.71%	6.76%	3.31%
Technology	0.01%	8.09%	12.07%	13.89%	-0.52%	17.06%	25.31%	23.76%	21.60%	0.62%
Utilities	2.16%	1.20%	2.66%	2.76%	7.83%	15.22%	7.66%	11.63%	9.82%	2.92%
DJIA	0.66%	2.36%	4.12%	0.92%	0.04%	7.93%	11.69%	14.51%	11.15%	1.68%
NASDAQ	-0.16%	6.65%	9.61%	10.57%	-0.78%	14.90%	18.26%	17.05%	14.67%	#N/A
Russell 3000	0.39%	4.44%	6.47%	5.75%	0.76%	12.27%	14.79%	16.88%	12.12%	1.25%
Russell 1000 Growth	-0.09%	6.40%	8.73%	10.66%	-0.37%	16.75%	20.58%	18.84%	15.93%	0.57%
Russell 1000 Value	0.98%	2.27%	3.80%	0.63%	2.78%	8.07%	9.34%	14.93%	8.55%	2.05%
Russell Midcap	0.46%	3.59%	6.70%	5.59%	2.00%	9.04%	10.46%	14.99%	9.28%	1.52%
Russell 2500	0.29%	3.82%	7.41%	5.20%	-2.69%	2.56%	7.79%	13.60%	7.94%	1.43%
Russell 2000	0.54%	3.41%	6.71%	4.25%	-5.63%	0.67%	6.86%	12.19%	6.78%	1.38%
MSCI AC World	0.30%	3.71%	5.31%	6.34%	5.04%	12.53%	14.03%	15.20%	9.53%	1.67%
MSCI AC World ex USA	0.12%	2.12%	3.29%	7.10%	12.84%	11.38%	11.54%	12.03%	5.52%	2.48%
MSCI EAFE	0.12%	1.46%	2.27%	7.07%	14.57%	10.56%	12.98%	13.20%	5.96%	2.64%
MSCI Europe	0.44%	1.52%	2.53%	7.18%	18.58%	10.71%	14.37%	15.07%	6.29%	2.70%
MSCI Japan	-0.68%	0.95%	0.64%	5.91%	6.44%	8.37%	11.70%	9.55%	5.73%	2.08%
MSCI EM (Emerging Markets)	0.01%	3.59%	5.59%	7.01%	10.23%	11.40%	8.64%	8.47%	4.06%	2.14%
MSCI EM Asia	0.04%	3.99%	6.33%	7.16%	8.69%	12.40%	9.07%	7.90%	4.95%	1.79%
MSCI EM Eastern Europe	-0.88%	2.41%	3.93%	9.97%	41.07%	26.53%	29.38%	-10.40%	-4.78%	#N/A
MSCI EM Latin America	-0.30%	2.86%	4.09%	11.34%	25.62%	-2.76%	8.01%	15.16%	2.79%	3.86%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.50%	-0.15%	-1.18%	-0.79%	1.97%	4.22%	1.62%	-0.88%	1.45%	4.77%
Bloomberg Municipal State GO (10 Y)	0.06%	0.14%	0.49%	0.00%	0.01%	0.73%	2.75%	0.71%	2.12%	3.63%
Bardays US High Yield	-0.10%	0.78%	1.30%	1.28%	2.30%	8.59%	7.53%	6.61%	4.99%	7.48%
Bloomberg Global Aggregate USD	0.49%	-0.14%	-1.13%	-0.75%	1.99%	4.33%	1.80%	-0.70%	1.55%	4.80%
Bbg EM Gov't Diversified	0.20%	-0.07%	0.32%	3.64%	7.22%	7.54%	5.84%	0.87%	0.99%	6.44%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	1.82%	0.71%	0.67%	-1.43%	1.43%	9.11%	1.45%	9.63%	5.69%	3.86%
Alerian MLP	0.40%	5.20%	4.81%	-4.46%	7.56%	17.23%	22.72%	28.87%	3.87%	6.97%
Bloomberg Commodity	-0.71%	0.11%	0.90%	-3.95%	4.57%	2.52%	-3.12%	13.62%	1.63%	
US Dollar Index	-0.07%	0.29%	1.61%	-2.63%	-5.47%	1.96%	3.69%	2.78%	2.77%	
Interest Rates	5/15/25	5/8/25	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	3.96%	3.90%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.07%	4.00%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.45%	4.37%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.63%	2.51%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.47%	1.31%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.42%	9.23%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.86%	6.83%	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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