



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	2.05%	-0.30%	6.46%	5.74%	1.22%	13.09%	14.20%	16.00%	12.75%	1.24%
Communications Services	2.14%	2.13%	9.65%	10.47%	3.61%	19.41%	21.72%	15.23%	10.86%	0.75%
Consumer Discretionary	3.04%	0.72%	10.88%	10.53%	-4.73%	22.67%	14.12%	12.43%	12.25%	0.62%
Consumer Staples	0.92%	-0.10%	0.92%	2.17%	7.51%	13.19%	8.12%	11.53%	8.99%	2.21%
Energy	0.84%	-1.11%	2.28%	-11.68%	-2.66%	-6.54%	1.46%	20.56%	4.71%	3.54%
Financials	1.80%	-0.78%	4.42%	2.25%	5.85%	24.32%	14.82%	18.44%	11.92%	1.44%
Health Care	1.46%	-1.92%	-5.94%	-9.43%	-3.50%	-6.94%	1.23%	7.40%	7.69%	1.83%
Industrials	1.79%	-0.29%	9.16%	9.37%	9.16%	16.87%	16.44%	17.73%	11.59%	1.26%
Materials	1.70%	0.34%	3.85%	1.59%	4.45%	-2.54%	2.11%	11.89%	7.79%	1.91%
Real Estate	1.64%	-1.34%	-0.09%	-1.29%	2.24%	14.50%	0.85%	7.29%	6.82%	3.27%
Technology	2.55%	-0.49%	11.09%	12.90%	-1.39%	13.11%	23.37%	22.63%	21.37%	0.62%
Utilities	0.78%	-1.39%	3.45%	3.55%	8.67%	17.68%	6.04%	10.74%	9.87%	2.84%
DJIA	1.80%	-0.75%	4.29%	1.08%	0.21%	10.28%	10.58%	12.80%	11.23%	1.70%
NASDAQ	2.47%	0.30%	10.13%	11.10%	-0.31%	14.20%	17.41%	16.15%	14.59%	#N/A
Russell 3000	2.07%	-0.34%	6.58%	5.86%	0.86%	12.71%	13.54%	15.36%	12.11%	1.24%
Russell 1000 Growth	2.43%	0.14%	8.97%	10.90%	-0.15%	16.29%	19.61%	17.91%	15.93%	0.57%
Russell 1000 Value	1.62%	-0.88%	3.80%	0.64%	2.79%	9.39%	7.93%	12.88%	8.55%	2.03%
Russell Midcap	1.87%	-1.04%	6.17%	5.07%	1.50%	10.00%	8.76%	12.73%	9.20%	1.52%
Russell 2500	2.24%	-0.75%	7.17%	4.96%	-2.92%	4.33%	5.99%	10.96%	7.84%	1.43%
Russell 2000	2.48%	-0.70%	6.54%	4.08%	-5.78%	2.38%	4.97%	9.21%	6.67%	1.41%
MSCI AC World	1.25%	-0.01%	5.99%	7.02%	5.72%	13.21%	12.87%	14.00%	9.69%	1.72%
MSCI AC World ex USA	-0.17%	0.51%	4.91%	8.78%	14.61%	12.82%	10.43%	11.10%	5.88%	2.53%
MSCI EAFE	-0.11%	0.65%	4.77%	9.69%	17.37%	13.16%	12.06%	12.20%	6.39%	2.70%
MSCI Europe	-0.04%	0.43%	5.30%	10.07%	21.78%	13.85%	13.27%	13.90%	6.76%	2.75%
MSCI Japan	-0.43%	1.20%	2.79%	8.17%	8.71%	9.91%	11.34%	8.75%	5.99%	2.22%
MSCI EM (Emerging Markets)	-0.51%	-0.23%	4.87%	6.28%	9.47%	9.93%	6.98%	7.68%	4.23%	2.16%
MSCI EM Asia	-0.65%	-0.14%	5.41%	6.23%	7.74%	9.97%	7.43%	7.54%	4.87%	1.79%
MSCI EM Eastern Europe	-0.06%	0.62%	4.87%	10.96%	42.34%	27.94%	27.52%	-12.10%	-4.03%	#N/A
MSCI EM Latin America	0.78%	-0.08%	4.38%	11.66%	25.98%	0.63%	4.01%	11.49%	3.69%	4.13%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.51%	0.22%	-1.08%	-0.69%	2.07%	5.09%	1.20%	-0.93%	1.47%	4.76%
Bloomberg Municipal State GO (10 Y)	0.23%	0.07%	0.53%	0.04%	0.05%	2.32%	1.80%	0.47%	2.12%	3.64%
Barclays US High Yield	0.52%	0.02%	1.46%	1.44%	2.46%	9.03%	6.68%	5.82%	4.99%	7.53%
Bloomberg Global Aggregate USD	0.50%	0.22%	-1.01%	-0.63%	2.11%	5.18%	1.39%	-0.76%	1.57%	4.80%
Bbg EM Gov't Diversified	0.00%	0.85%	1.74%	5.11%	8.74%	9.18%	5.05%	0.57%	1.44%	6.37%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	1.73%	-1.30%	0.16%	-1.93%	0.91%	12.60%	0.10%	6.86%	5.72%	3.82%
Alerian MLP	1.25%	0.09%	4.46%	-4.77%	7.21%	19.20%	19.82%	25.50%	3.87%	6.99%
Bloomberg Commodity	-0.70%	-0.18%	1.32%	-3.55%	5.01%	1.72%	-4.36%	13.34%	2.20%	
US Dollar Index	0.44%	-0.51%	0.40%	-3.78%	-6.59%	0.23%	4.27%	2.83%	2.19%	
Interest Rates	5/27/25	5/20/25	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	3.92%	3.97%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.04%	4.07%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.43%	4.48%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.54%	2.61%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.46%	1.52%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.35%	9.33%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.98%	6.92%	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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