



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.40%	1.22%	6.29%	5.57%	1.06%	13.72%	14.10%	15.89%	12.82%	1.25%
Communications Services	-0.36%	0.61%	9.08%	9.90%	3.07%	18.90%	21.45%	15.17%	10.88%	0.76%
Consumer Discretionary	0.21%	1.37%	10.07%	9.72%	-5.42%	22.57%	13.81%	12.34%	12.27%	0.63%
Consumer Staples	0.26%	0.93%	0.62%	1.86%	7.19%	14.67%	8.00%	11.25%	9.04%	2.22%
Energy	0.67%	0.54%	1.68%	-12.20%	-3.23%	-6.43%	1.26%	21.16%	4.69%	3.56%
Financials	0.49%	1.19%	4.20%	2.03%	5.63%	26.49%	14.70%	19.04%	12.01%	1.44%
Health Care	0.74%	1.40%	-5.79%	-9.28%	-3.35%	-4.87%	1.28%	6.89%	7.73%	1.82%
Industrials	0.08%	0.98%	8.68%	8.89%	8.68%	19.53%	16.22%	17.98%	11.69%	1.27%
Materials	0.30%	0.65%	2.84%	0.60%	3.43%	-1.71%	1.77%	11.44%	7.73%	1.93%
Real Estate	0.94%	2.63%	0.84%	-0.37%	3.19%	17.37%	1.16%	7.39%	7.07%	3.24%
Technology	0.59%	1.43%	11.36%	13.17%	-1.15%	12.25%	23.41%	22.45%	21.50%	0.62%
Utilities	0.74%	1.24%	2.72%	2.82%	7.90%	18.54%	5.77%	9.75%	9.78%	2.86%
DJIA	0.28%	0.88%	3.98%	0.78%	-0.10%	11.74%	10.44%	12.86%	11.28%	1.67%
NASDAQ	0.39%	1.33%	10.00%	10.96%	-0.43%	14.07%	17.31%	15.93%	14.66%	#N/A
Russell 3000	0.37%	1.20%	6.34%	5.63%	0.64%	13.42%	13.42%	15.29%	12.17%	1.25%
Russell 1000 Growth	0.33%	1.29%	8.87%	10.80%	-0.24%	16.22%	19.52%	17.64%	16.03%	0.57%
Russell 1000 Value	0.40%	1.07%	3.43%	0.28%	2.42%	10.99%	7.79%	12.96%	8.56%	2.04%
Russell Midcap	0.26%	0.88%	5.52%	4.44%	0.88%	11.56%	8.51%	12.60%	9.21%	1.53%
Russell 2500	0.25%	1.22%	6.35%	4.15%	-3.66%	5.45%	5.70%	11.11%	7.83%	1.44%
Russell 2000	0.34%	1.44%	5.75%	3.31%	-6.48%	3.28%	4.70%	9.69%	6.65%	1.40%
MSCI AC World	0.45%	1.11%	5.89%	6.93%	5.63%	14.41%	12.80%	13.86%	9.77%	1.72%
MSCI AC World ex USA	0.56%	0.94%	4.96%	8.83%	14.67%	14.98%	10.42%	10.94%	5.99%	2.53%
MSCI EAFE	0.68%	1.06%	4.68%	9.59%	17.26%	15.14%	11.99%	11.94%	6.47%	2.70%
MSCI Europe	0.24%	0.26%	4.53%	9.28%	20.90%	15.32%	12.97%	13.43%	6.83%	2.76%
MSCI Japan	2.13%	3.41%	4.58%	10.06%	10.61%	13.32%	11.95%	8.86%	6.12%	2.18%
MSCI EM (Emerging Markets)	0.55%	0.47%	5.44%	6.86%	10.07%	12.39%	7.16%	7.72%	4.44%	2.17%
MSCI EM Asia	0.66%	0.39%	6.06%	6.89%	8.41%	12.54%	7.63%	7.50%	5.07%	1.79%
MSCI EM Eastern Europe	-0.90%	2.47%	4.80%	10.88%	42.25%	31.81%	27.41%	-12.25%	-3.79%	#N/A
MSCI EM Latin America	0.25%	0.88%	3.83%	11.07%	25.31%	1.98%	3.82%	11.86%	3.80%	4.13%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.33%	0.77%	-0.92%	-0.54%	2.23%	6.03%	1.25%	-0.94%	1.46%	4.75%
Bloomberg Municipal State GO (10 Y)	0.04%	0.37%	0.57%	0.08%	0.09%	2.76%	1.81%	0.44%	2.18%	3.63%
Barclays US High Yield	0.17%	0.60%	1.67%	1.65%	2.67%	9.53%	6.74%	5.77%	5.01%	7.46%
Bloomberg Global Aggregate USD	0.32%	0.76%	-0.86%	-0.48%	2.26%	6.08%	1.44%	-0.78%	1.56%	4.78%
Bbg EM Gov't Diversified	0.13%	0.82%	1.78%	5.15%	8.78%	9.87%	5.05%	0.49%	1.44%	6.36%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.95%	2.65%	1.02%	-1.09%	1.78%	15.28%	0.38%	7.19%	5.94%	3.82%
Alerian MLP	-1.21%	-0.19%	2.23%	-6.81%	4.92%	16.98%	18.91%	25.29%	4.29%	7.06%
Bloomberg Commodity	-0.21%	-0.95%	0.26%	-4.56%	3.92%	0.13%	-4.68%	12.80%	2.00%	
US Dollar Index	-0.18%	-0.58%	0.22%	-3.96%	-6.76%	-0.36%	4.19%	2.93%	2.22%	
Interest Rates	5/29/25	5/22/25	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%	4.00%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.00%	4.11%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.43%	4.54%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.52%	2.65%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.51%	1.54%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.27%	9.34%	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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