



| Equities | 1 Day | 1 Week | MTD | QTD | YTD | 1 Year | 3 Years | 5 Years | 10 Years | Yield |
|---|--------|---------|----------|----------|----------|----------|----------|----------|----------|-------|
| S&P 500 | 0.01% | 1.43% | 1.02% | 6.65% | 2.09% | 14.30% | 14.95% | 15.61% | 12.99% | 1.23% |
| Communications Services | 1.37% | 1.37% | 1.22% | 11.80% | 4.86% | 20.57% | 22.23% | 15.40% | 11.13% | 0.75% |
| Consumer Discretionary | -0.23% | -0.10% | 0.27% | 9.39% | -5.71% | 21.30% | 13.67% | 11.69% | 12.17% | 0.63% |
| Consumer Staples | -0.59% | 0.89% | -0.55% | 2.49% | 7.86% | 12.38% | 8.82% | 11.27% | 9.24% | 2.20% |
| Energy | -1.85% | 0.37% | 0.38% | -12.46% | -3.52% | -5.88% | 0.76% | 19.37% | 4.82% | 3.57% |
| Financials | -0.56% | 0.42% | -0.29% | 1.96% | 5.55% | 25.15% | 15.48% | 17.20% | 11.97% | 1.44% |
| Health Care | 0.22% | 1.42% | 0.42% | -8.67% | -2.69% | -6.63% | 2.58% | 7.34% | 7.89% | 1.81% |
| Industrials | 0.09% | 0.86% | 0.64% | 9.75% | 9.53% | 19.93% | 16.51% | 16.67% | 11.78% | 1.26% |
| Materials | 0.43% | 2.45% | 1.95% | 2.75% | 5.64% | 0.09% | 2.77% | 10.80% | 8.04% | 1.90% |
| Real Estate | 0.34% | 1.13% | 0.04% | -0.18% | 3.39% | 13.03% | 1.97% | 6.73% | 7.20% | 3.24% |
| Technology | 0.23% | 2.79% | 2.62% | 15.65% | 1.01% | 15.94% | 24.79% | 22.75% | 21.85% | 0.61% |
| Utilities | -1.70% | 0.60% | -1.20% | 2.68% | 7.75% | 16.15% | 6.20% | 9.46% | 10.09% | 2.87% |
| DJIA | -0.22% | 0.86% | 0.40% | 1.36% | 0.48% | 11.46% | 10.97% | 12.20% | 11.41% | 1.68% |
| NASDAQ | 0.32% | 1.90% | 1.82% | 12.63% | 1.07% | 16.19% | 18.30% | 15.96% | 14.85% | #N/A |
| Russell 3000 | 0.02% | 1.44% | 1.07% | 6.76% | 1.72% | 14.23% | 14.25% | 14.95% | 12.33% | 1.23% |
| Russell 1000 Growth | 0.37% | 1.96% | 1.65% | 12.61% | 1.38% | 18.37% | 20.56% | 17.79% | 16.25% | 0.56% |
| Russell 1000 Value | -0.40% | 0.78% | 0.30% | 0.65% | 2.80% | 10.16% | 8.42% | 12.07% | 8.67% | 2.03% |
| Russell Midcap | -0.22% | 1.27% | 0.83% | 5.49% | 1.90% | 12.62% | 9.31% | 11.90% | 9.37% | 1.52% |
| Russell 2500 | -0.15% | 1.14% | 1.23% | 5.08% | -2.81% | 6.77% | 6.19% | 10.36% | 7.94% | 1.43% |
| Russell 2000 | -0.21% | 1.53% | 1.58% | 4.53% | -5.38% | 4.58% | 5.19% | 9.05% | 6.74% | 1.37% |
| MSCI AC World | 0.35% | 1.48% | 1.10% | 8.02% | 6.70% | 15.04% | 13.39% | 13.28% | 9.92% | 1.68% |
| MSCI AC World ex USA | 0.92% | 1.45% | 1.14% | 9.79% | 15.68% | 15.22% | 10.59% | 9.91% | 6.09% | 2.51% |
| MSCI EAFE | 0.90% | 1.78% | 1.05% | 10.79% | 18.55% | 14.39% | 12.52% | 10.98% | 6.55% | 2.67% |
| MSCI Europe | 0.87% | 1.71% | 1.23% | 10.87% | 22.66% | 15.37% | 13.76% | 12.31% | 6.87% | 2.73% |
| MSCI Japan | 0.98% | 1.64% | 0.03% | 9.53% | 10.08% | 9.22% | 11.90% | 8.43% | 6.12% | 2.14% |
| MSCI EM (Emerging Markets) | 1.25% | 0.83% | 1.37% | 7.15% | 10.38% | 14.79% | 6.64% | 6.46% | 4.62% | 2.18% |
| MSCI EM Asia | 1.36% | 1.01% | 1.33% | 7.26% | 8.79% | 14.88% | 6.94% | 6.35% | 5.28% | 1.80% |
| MSCI EM Eastern Europe | 1.49% | -1.18% | 0.36% | 10.57% | 41.85% | 33.02% | 26.47% | -13.02% | -3.50% | #N/A |
| MSCI EM Latin America | -0.02% | -0.51% | 1.35% | 10.22% | 24.36% | 5.15% | 4.21% | 9.23% | 3.63% | 4.18% |
| Fixed Income | 1 Day | 1 Week | MTD | QTD | YTD | 1 Year | 3 Years | 5 Years | 10 Years | Yield |
| Bloomberg US Aggregate | 0.60% | 0.86% | 0.32% | -0.01% | 2.77% | 4.74% | 1.73% | -0.75% | 1.61% | 4.67% |
| Bloomberg Municipal State GO (10 Y) | 0.08% | 0.11% | 0.02% | 0.15% | 0.17% | 2.20% | 1.73% | 0.40% | 2.22% | 3.64% |
| Barclays US High Yield | 0.16% | 0.48% | 0.30% | 1.97% | 2.99% | 9.16% | 6.98% | 5.39% | 5.09% | 7.41% |
| Bloomberg Global Aggregate USD | 0.59% | 0.84% | 0.32% | 0.04% | 2.80% | 4.85% | 1.90% | -0.60% | 1.71% | 4.70% |
| Bbg EM Gov't Diversified | 0.20% | 0.34% | 0.54% | 5.37% | 9.01% | 10.34% | 5.05% | 0.11% | 1.52% | 6.37% |
| Other | 1 Day | 1 Week | MTD | QTD | YTD | 1 Year | 3 Years | 5 Years | 10 Years | Yield |
| FTSE NAREIT | 0.16% | 0.90% | -0.10% | -1.14% | 1.73% | 10.55% | 0.99% | 6.05% | 6.05% | 3.78% |
| Alerian MLP | -1.76% | -1.28% | 0.44% | -6.87% | 4.85% | 16.46% | 18.15% | 23.44% | 4.43% | 7.16% |
| Bloomberg Commodity | 0.13% | 1.39% | 2.46% | -3.03% | 5.58% | 5.87% | -4.18% | 12.87% | 2.25% | |
| US Dollar Index | 0.11% | -1.01% | -0.51% | -4.38% | -7.17% | 0.03% | 3.89% | 3.20% | 2.34% | |
| Interest Rates | 6/3/25 | 5/27/25 | 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% | 3.92% | 4.25% | 4.23% | 4.41% | 0.73% | 0.13% | 1.58% | 2.48% | |
| US Treasury Constant Maturity - 5 Year | 4.04% | 4.04% | 4.38% | 3.84% | 3.99% | 1.26% | 0.36% | 1.69% | 2.51% | |
| US Treasury Constant Maturity - 10 Year | 4.46% | 4.43% | 4.58% | 3.88% | 3.88% | 1.52% | 0.93% | 1.92% | 2.69% | |
| Germany Benchmark Bond - 10 Year | 2.51% | 2.54% | 2.35% | 1.94% | 2.53% | -0.18% | -0.58% | -0.19% | 0.24% | |
| Japan Benchmark Bond - 10 Year | 1.48% | 1.46% | 1.09% | 0.59% | 0.42% | 0.07% | 0.02% | -0.02% | 0.01% | |
| Mexico Benchmark Bond - 10 Year | 9.21% | 9.26% | 10.41% | 8.95% | 9.02% | 7.56% | 5.55% | 6.84% | 8.71% | |
| 30 Year Fixed-Rate Mortgages, Average, US | 6.94% | 6.98% | 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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