



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.96%	0.49%	2.14%	7.83%	3.23%	12.53%	19.81%	15.76%	13.10%	1.22%
Communications Services	1.56%	0.59%	3.99%	14.86%	7.73%	21.59%	27.62%	15.78%	11.60%	0.73%
Consumer Discretionary	1.21%	0.21%	0.73%	9.89%	-5.28%	20.06%	18.95%	11.41%	12.23%	0.63%
Consumer Staples	0.08%	-0.76%	-2.46%	0.53%	5.79%	11.83%	10.52%	10.82%	9.03%	2.26%
Energy	-0.29%	5.25%	7.81%	-5.98%	3.63%	3.28%	8.05%	21.47%	5.54%	3.33%
Financials	1.13%	-0.94%	-0.79%	1.45%	5.02%	26.22%	20.11%	17.81%	11.73%	1.46%
Health Care	-0.32%	1.11%	2.24%	-7.01%	-0.93%	-5.41%	5.98%	8.02%	8.01%	1.78%
Industrials	0.72%	-0.78%	0.54%	9.63%	9.42%	20.37%	20.76%	17.08%	11.82%	1.27%
Materials	0.78%	-0.31%	1.89%	2.69%	5.58%	1.13%	7.81%	11.40%	8.04%	1.90%
Real Estate	0.05%	0.09%	0.37%	0.14%	3.73%	12.57%	6.29%	6.32%	7.30%	3.25%
Technology	1.52%	1.20%	4.51%	17.77%	2.87%	8.36%	30.95%	22.30%	22.18%	0.60%
Utilities	-0.48%	0.43%	-1.15%	2.73%	7.81%	19.36%	10.85%	9.87%	10.25%	2.87%
DJIA	0.80%	-0.51%	0.71%	1.67%	0.79%	12.12%	14.62%	12.25%	11.43%	1.69%
NASDAQ	1.52%	0.58%	3.12%	14.06%	2.36%	12.11%	23.68%	15.59%	15.00%	#N/A
Russell 3000	0.98%	0.35%	2.13%	7.88%	2.79%	12.84%	19.21%	15.09%	12.42%	1.22%
Russell 1000 Growth	1.21%	0.60%	2.73%	13.80%	2.46%	13.63%	26.00%	17.53%	16.40%	0.56%
Russell 1000 Value	0.68%	0.17%	1.29%	1.66%	3.83%	12.42%	12.87%	12.69%	8.73%	2.02%
Russell Midcap	1.11%	-0.02%	1.48%	6.17%	2.56%	13.54%	14.60%	12.19%	9.42%	1.51%
Russell 2500	1.17%	-0.69%	2.04%	5.92%	-2.03%	8.53%	11.42%	10.59%	7.93%	1.43%
Russell 2000	1.14%	-0.90%	2.89%	5.88%	-4.15%	7.30%	10.37%	9.32%	6.71%	1.36%
MSCI AC World	0.89%	0.47%	2.14%	9.14%	7.81%	14.73%	17.72%	13.49%	10.12%	1.69%
MSCI AC World ex USA	0.75%	0.50%	2.17%	10.91%	16.86%	17.69%	14.06%	10.27%	6.38%	2.45%
MSCI EAFE	0.80%	0.33%	1.36%	11.13%	18.91%	17.78%	16.21%	11.25%	6.77%	2.62%
MSCI Europe	0.75%	0.45%	1.88%	11.58%	23.45%	19.27%	18.14%	12.82%	7.17%	2.66%
MSCI Japan	0.86%	-0.06%	-0.97%	8.44%	8.98%	11.70%	13.48%	8.00%	6.15%	2.16%
MSCI EM (Emerging Markets)	0.69%	0.53%	3.78%	9.71%	13.01%	14.56%	9.27%	6.93%	5.10%	2.09%
MSCI EM Asia	0.71%	0.60%	4.23%	10.32%	11.90%	14.03%	9.35%	6.79%	5.95%	1.71%
MSCI EM Eastern Europe	0.75%	0.68%	-0.02%	10.15%	41.31%	37.05%	30.40%	-12.83%	-3.84%	#N/A
MSCI EM Latin America	1.40%	2.60%	4.36%	13.50%	28.05%	13.11%	9.75%	10.31%	3.83%	3.94%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.19%	0.32%	0.05%	-0.28%	2.49%	3.67%	2.48%	-0.94%	1.60%	4.74%
Bloomberg Municipal State GO (10 Y)	-0.03%	0.12%	0.26%	0.39%	0.41%	1.32%	2.64%	0.45%	2.22%	3.60%
Barclays US High Yield	0.15%	0.29%	0.63%	2.30%	3.32%	9.21%	9.08%	5.30%	5.21%	7.33%
Bloomberg Global Aggregate USD	-0.17%	0.31%	0.07%	-0.21%	2.55%	3.82%	2.65%	-0.79%	1.70%	4.78%
Bbg EM Gov't Diversified	0.48%	0.48%	1.24%	6.11%	9.77%	12.26%	7.05%	0.42%	1.63%	6.40%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.04%	-0.37%	0.10%	-0.94%	1.94%	10.28%	5.21%	5.61%	6.13%	3.80%
Alerian MLP	-0.82%	1.20%	2.81%	-4.68%	7.31%	18.64%	25.69%	24.67%	4.43%	7.02%
Bloomberg Commodity	0.41%	2.48%	5.92%	0.25%	9.15%	8.04%	-2.28%	13.76%	2.54%	
US Dollar Index	-0.18%	-0.88%	-1.13%	-4.97%	-7.75%	-2.13%	3.23%	3.02%	2.33%	
Interest Rates	6/16/25	6/9/25	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	3.97%	4.01%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.04%	4.09%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.46%	4.49%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.52%	2.59%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.44%	1.47%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.00%	9.00%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.89%	6.87%	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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