



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.83%	-0.89%	1.29%	6.94%	2.37%	10.74%	19.39%	15.65%	12.98%	1.23%
Communications Services	-0.73%	-1.22%	3.23%	14.01%	6.93%	20.24%	26.76%	15.60%	11.52%	0.74%
Consumer Discretionary	-1.55%	-2.51%	-0.83%	8.19%	-6.75%	16.53%	17.86%	11.04%	12.01%	0.64%
Consumer Staples	-0.79%	-1.70%	-3.23%	-0.27%	4.95%	9.87%	10.38%	10.69%	8.89%	2.28%
Energy	1.03%	4.47%	8.92%	-5.01%	4.69%	4.11%	10.50%	22.53%	5.66%	3.30%
Financials	-0.60%	-1.60%	-1.39%	0.84%	4.39%	24.45%	19.74%	18.00%	11.67%	1.47%
Health Care	-1.64%	-1.62%	0.57%	-8.53%	-2.55%	-6.83%	5.39%	7.68%	7.82%	1.81%
Industrials	-0.75%	-1.10%	-0.22%	8.80%	8.59%	18.20%	20.55%	17.06%	11.71%	1.28%
Materials	-1.00%	-1.85%	0.87%	1.67%	4.53%	-0.58%	7.49%	11.34%	7.89%	1.92%
Real Estate	-0.32%	-1.06%	0.05%	-0.18%	3.40%	12.88%	5.95%	6.50%	7.18%	3.26%
Technology	-0.72%	0.01%	3.75%	16.92%	2.12%	6.33%	30.21%	22.12%	22.07%	0.60%
Utilities	-0.81%	-0.59%	-1.95%	1.91%	6.94%	19.74%	10.89%	9.76%	10.05%	2.90%
DJIA	-0.70%	-1.47%	0.00%	0.96%	0.08%	10.74%	14.40%	12.24%	11.33%	1.67%
NASDAQ	-0.91%	-0.97%	2.18%	13.02%	1.42%	10.04%	22.72%	15.34%	14.87%	#N/A
Russell 3000	-0.83%	-1.00%	1.28%	6.98%	1.93%	11.06%	18.72%	15.00%	12.31%	1.23%
Russell 1000 Growth	-0.85%	-0.86%	1.85%	12.83%	1.58%	11.59%	25.19%	17.30%	16.27%	0.56%
Russell 1000 Value	-0.80%	-1.03%	0.48%	0.84%	2.99%	10.98%	12.67%	12.74%	8.63%	2.03%
Russell Midcap	-0.93%	-1.27%	0.54%	5.19%	1.61%	11.77%	14.03%	12.11%	9.29%	1.52%
Russell 2500	-0.90%	-1.94%	1.13%	4.97%	-2.91%	6.82%	10.75%	10.65%	7.83%	1.44%
Russell 2000	-1.04%	-2.48%	1.82%	4.78%	-5.15%	5.36%	9.64%	9.48%	6.61%	1.37%
MSCI AC World	-0.78%	-0.74%	1.34%	8.28%	6.96%	13.38%	17.49%	13.31%	10.04%	1.69%
MSCI AC World ex USA	-0.73%	-0.50%	1.42%	10.10%	16.00%	17.17%	14.16%	10.01%	6.34%	2.54%
MSCI EAFE	-1.09%	-0.86%	0.26%	9.92%	17.62%	16.86%	16.29%	10.90%	6.71%	2.74%
MSCI Europe	-1.40%	-1.06%	0.45%	10.02%	21.72%	17.22%	17.74%	12.36%	7.07%	2.80%
MSCI Japan	-0.44%	-0.42%	-1.41%	7.96%	8.50%	13.58%	14.77%	7.96%	6.22%	2.26%
MSCI EM (Emerging Markets)	-0.08%	-0.18%	3.70%	9.62%	12.92%	14.75%	9.36%	6.81%	5.05%	2.11%
MSCI EM Asia	0.11%	0.10%	4.35%	10.45%	12.02%	14.47%	9.41%	6.74%	5.89%	1.71%
MSCI EM Eastern Europe	-0.03%	-1.17%	-0.06%	10.11%	41.26%	34.47%	30.85%	-12.76%	-3.80%	#N/A
MSCI EM Latin America	-0.51%	1.34%	3.83%	12.92%	27.40%	13.54%	10.48%	10.09%	3.81%	3.94%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.34%	0.48%	0.39%	0.06%	2.84%	4.39%	2.59%	-0.88%	1.63%	4.70%
Bloomberg Municipal State GO (10 Y)	0.10%	0.24%	0.37%	0.49%	0.51%	1.42%	2.65%	0.48%	2.22%	3.58%
Barclays US High Yield	-0.06%	0.15%	0.57%	2.24%	3.26%	9.16%	8.98%	5.28%	5.19%	7.37%
Bloomberg Global Aggregate USD	0.33%	0.47%	0.39%	0.12%	2.88%	4.52%	2.76%	-0.73%	1.73%	4.73%
Bbg EM Gov't Diversified	-0.21%	0.26%	1.04%	5.89%	9.55%	12.05%	6.99%	0.42%	1.62%	6.38%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.16%	-1.26%	-0.06%	-1.10%	1.77%	10.51%	4.88%	5.89%	6.04%	3.80%
Alerian MLP	-0.28%	0.38%	2.52%	-4.94%	7.02%	17.30%	26.68%	24.95%	4.43%	7.05%
Bloomberg Commodity	1.04%	3.99%	7.03%	1.29%	10.29%	9.68%	-1.04%	13.95%	2.65%	
US Dollar Index	0.70%	-0.18%	-0.26%	-4.13%	-6.93%	-1.09%	3.19%	3.15%	2.51%	
Interest Rates	6/17/25	6/10/25	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	3.94%	4.01%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.99%	4.08%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.39%	4.47%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.53%	2.53%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.48%	1.48%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.95%	9.00%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.88%	6.90%	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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