



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.96%	-0.12%	2.02%	7.71%	3.11%	11.69%	18.39%	15.68%	12.94%	1.23%
Communications Services	0.85%	-2.39%	1.50%	12.11%	5.15%	17.79%	24.84%	15.03%	11.11%	0.75%
Consumer Discretionary	1.75%	-0.20%	0.53%	9.67%	-5.47%	16.90%	16.73%	11.02%	11.95%	0.63%
Consumer Staples	1.30%	1.03%	-1.46%	1.56%	6.87%	11.90%	9.39%	11.19%	8.98%	2.23%
Energy	-2.51%	-1.15%	6.57%	-7.06%	2.43%	0.24%	10.84%	21.95%	5.38%	3.37%
Financials	1.21%	0.89%	0.09%	2.35%	5.95%	25.21%	19.82%	18.54%	11.73%	1.45%
Health Care	0.11%	-2.16%	0.03%	-9.02%	-3.07%	-8.04%	3.04%	7.42%	7.51%	1.82%
Industrials	1.31%	0.43%	0.97%	10.10%	9.89%	19.04%	20.74%	17.66%	11.73%	1.26%
Materials	1.22%	-0.75%	1.12%	1.92%	4.79%	-0.42%	8.02%	11.32%	7.89%	1.91%
Real Estate	1.49%	1.29%	1.66%	1.43%	5.06%	14.19%	4.61%	7.45%	7.48%	3.21%
Technology	1.01%	0.39%	4.92%	18.23%	3.27%	9.50%	29.16%	21.82%	22.12%	0.60%
Utilities	1.26%	0.96%	-0.21%	3.72%	8.84%	21.41%	9.62%	10.79%	10.38%	2.85%
DJIA	0.89%	0.16%	0.88%	1.84%	0.95%	10.64%	13.74%	12.39%	11.30%	1.69%
NASDAQ	0.94%	-0.34%	2.76%	13.67%	2.00%	11.71%	21.35%	14.96%	14.72%	#N/A
Russell 3000	0.95%	-0.07%	2.06%	7.80%	2.71%	12.02%	17.74%	15.04%	12.26%	1.23%
Russell 1000 Growth	1.08%	-0.48%	2.24%	13.26%	1.97%	12.80%	23.66%	16.98%	16.15%	0.56%
Russell 1000 Value	0.79%	0.37%	1.67%	2.03%	4.21%	11.50%	12.17%	13.22%	8.66%	2.01%
Russell Midcap	0.82%	0.31%	1.80%	6.50%	2.88%	12.78%	13.51%	12.47%	9.32%	1.51%
Russell 2500	0.93%	0.54%	2.59%	6.49%	-1.50%	8.13%	10.43%	10.90%	7.81%	1.43%
Russell 2000	1.11%	0.42%	3.32%	6.32%	-3.76%	6.89%	9.18%	9.60%	6.54%	1.35%
MSCI AC World	0.49%	-0.80%	1.32%	8.26%	6.94%	13.21%	16.65%	13.08%	9.82%	1.69%
MSCI AC World ex USA	-0.32%	-2.03%	0.10%	8.66%	14.49%	14.93%	13.57%	9.40%	5.90%	2.54%
MSCI EAFE	-0.27%	-2.49%	-1.17%	8.35%	15.95%	14.77%	15.42%	10.32%	6.22%	2.75%
MSCI Europe	-0.10%	-2.62%	-0.79%	8.66%	20.22%	15.30%	17.05%	11.76%	6.57%	2.83%
MSCI Japan	-0.86%	-2.48%	-3.43%	5.74%	6.27%	11.30%	13.43%	7.32%	5.70%	2.23%
MSCI EM (Emerging Markets)	-0.63%	-1.27%	2.47%	8.32%	11.58%	12.01%	9.21%	6.10%	4.68%	2.10%
MSCI EM Asia	-0.80%	-1.21%	2.97%	8.98%	10.54%	11.76%	9.07%	5.97%	5.49%	1.71%
MSCI EM Eastern Europe	-1.60%	-1.20%	-1.22%	8.83%	39.61%	31.30%	30.47%	-13.45%	-3.91%	#N/A
MSCI EM Latin America	-0.53%	-2.14%	2.13%	11.06%	25.31%	9.76%	10.81%	9.45%	3.53%	3.91%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.24%	0.68%	0.73%	0.40%	3.19%	4.54%	2.42%	-0.83%	1.71%	4.63%
Bloomberg Municipal State GO (10 Y)	0.14%	0.34%	0.60%	0.73%	0.75%	1.69%	2.49%	0.50%	2.22%	3.55%
Barclays US High Yield	0.17%	0.31%	0.94%	2.62%	3.65%	9.32%	9.12%	5.43%	5.19%	7.26%
Bloomberg Global Aggregate USD	0.24%	0.67%	0.73%	0.46%	3.23%	4.67%	2.60%	-0.69%	1.80%	4.67%
Bbg EM Gov't Diversified	-0.39%	-0.63%	0.60%	5.44%	9.08%	11.20%	6.68%	0.22%	1.48%	6.37%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	1.32%	1.41%	1.52%	0.46%	3.38%	11.88%	3.84%	6.86%	6.29%	3.76%
Alerian MLP	-0.54%	-0.60%	2.19%	-5.25%	6.67%	15.51%	27.27%	25.56%	4.43%	7.05%
Bloomberg Commodity	-1.53%	-0.51%	5.38%	-0.26%	8.59%	8.13%	0.01%	13.37%	2.47%	
US Dollar Index	-0.26%	0.55%	-0.58%	-4.45%	-7.24%	-1.92%	3.16%	3.20%	2.35%	
Interest Rates	6/23/25	6/16/25	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	3.84%	3.97%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.91%	4.04%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.34%	4.46%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.50%	2.52%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.40%	1.44%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.09%	8.95%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.88%	6.89%	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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