



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	1.11%	1.84%	3.16%	8.91%	4.25%	13.27%	17.64%	16.54%	13.14%	1.21%
Communications Services	1.41%	-0.29%	2.93%	13.69%	6.63%	19.22%	23.82%	15.92%	11.35%	0.74%
Consumer Discretionary	0.71%	2.10%	1.25%	10.46%	-4.79%	18.61%	15.59%	11.62%	12.11%	0.62%
Consumer Staples	-0.04%	1.80%	-1.49%	1.53%	6.84%	10.76%	8.71%	11.55%	9.02%	2.23%
Energy	-1.51%	-3.64%	4.96%	-8.46%	0.89%	-3.89%	9.72%	22.97%	5.29%	3.43%
Financials	1.50%	3.02%	1.59%	3.88%	7.54%	25.88%	18.93%	19.74%	11.99%	1.43%
Health Care	1.19%	0.66%	1.23%	-7.93%	-1.91%	-7.46%	2.90%	8.26%	7.74%	1.80%
Industrials	0.86%	2.06%	1.83%	11.04%	10.83%	19.61%	19.70%	18.71%	11.93%	1.25%
Materials	0.75%	1.00%	1.88%	2.69%	5.57%	-0.23%	6.89%	12.15%	8.11%	1.90%
Real Estate	0.43%	2.05%	2.10%	1.87%	5.52%	13.89%	4.04%	8.13%	7.59%	3.20%
Technology	1.61%	2.75%	6.61%	20.14%	4.93%	13.59%	28.34%	22.78%	22.36%	0.59%
Utilities	0.40%	2.18%	0.19%	4.13%	9.27%	20.39%	9.13%	11.08%	10.51%	2.84%
DJIA	1.20%	2.08%	2.09%	3.06%	2.16%	11.23%	13.19%	13.28%	11.54%	1.67%
NASDAQ	1.43%	2.02%	4.24%	15.30%	3.47%	14.54%	20.60%	15.80%	14.97%	#N/A
Russell 3000	1.15%	1.93%	3.24%	9.05%	3.90%	13.52%	16.98%	15.93%	12.47%	1.21%
Russell 1000 Growth	1.43%	1.81%	3.70%	14.87%	3.42%	15.53%	22.78%	17.88%	16.40%	0.55%
Russell 1000 Value	0.81%	2.00%	2.49%	2.86%	5.05%	11.53%	11.49%	14.09%	8.83%	1.99%
Russell Midcap	1.15%	2.42%	2.97%	7.73%	4.07%	13.56%	12.72%	13.43%	9.54%	1.49%
Russell 2500	1.18%	2.65%	3.80%	7.74%	-0.34%	8.92%	9.68%	11.90%	8.04%	1.41%
Russell 2000	1.34%	2.83%	4.70%	7.75%	-2.47%	7.85%	8.53%	10.66%	6.78%	1.33%
MSCI AC World	1.46%	1.44%	2.80%	9.84%	8.50%	14.84%	16.21%	13.92%	10.03%	1.70%
MSCI AC World ex USA	2.02%	0.69%	2.12%	10.86%	16.80%	16.56%	13.61%	10.23%	6.13%	2.56%
MSCI EAFE	1.94%	0.49%	0.75%	10.46%	18.20%	16.01%	15.40%	11.27%	6.46%	2.77%
MSCI Europe	1.84%	0.58%	1.03%	10.66%	22.43%	16.08%	16.67%	12.92%	6.80%	2.84%
MSCI Japan	2.12%	0.02%	-1.39%	7.98%	8.52%	13.12%	14.15%	7.97%	5.94%	2.28%
MSCI EM (Emerging Markets)	2.52%	1.31%	5.06%	11.05%	14.39%	15.09%	9.54%	6.71%	4.91%	2.10%
MSCI EM Asia	2.53%	1.18%	5.58%	11.75%	13.34%	15.22%	9.32%	6.49%	5.73%	1.72%
MSCI EM Eastern Europe	3.74%	2.53%	2.47%	12.89%	44.83%	32.78%	31.42%	-12.58%	-3.50%	#N/A
MSCI EM Latin America	1.76%	0.09%	3.93%	13.02%	27.52%	10.06%	11.26%	10.41%	3.69%	3.95%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.33%	0.68%	1.07%	0.74%	3.54%	4.81%	2.61%	-0.77%	1.72%	4.58%
Bloomberg Municipal State GO (10 Y)	0.04%	0.28%	0.64%	0.77%	0.79%	1.74%	2.49%	0.51%	2.22%	3.54%
Barclays US High Yield	0.32%	0.69%	1.26%	2.94%	3.97%	9.56%	9.03%	5.61%	5.23%	7.13%
Bloomberg Global Aggregate USD	0.33%	0.67%	1.07%	0.79%	3.57%	4.93%	2.79%	-0.63%	1.81%	4.62%
Bbg EM Gov't Diversified	1.18%	0.75%	1.79%	6.68%	10.37%	12.16%	7.10%	0.48%	1.61%	6.32%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.27%	1.85%	1.79%	0.73%	3.66%	11.27%	3.19%	7.51%	6.39%	3.75%
Alerian MLP	-0.06%	-0.38%	2.13%	-5.31%	6.61%	13.55%	26.13%	26.95%	4.43%	7.05%
Bloomberg Commodity	-2.46%	-3.95%	2.80%	-2.71%	5.93%	4.59%	-0.92%	13.17%	2.24%	
US Dollar Index	-0.80%	-0.88%	-1.13%	-4.97%	-7.75%	-2.19%	3.06%	2.98%	2.32%	
Interest Rates	6/24/25	6/17/25	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	3.75%	3.94%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.86%	3.99%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.30%	4.39%	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	1.42%	1.48%	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	6.88%	6.88%	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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