



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.52%	3.00%	5.09%	10.94%	6.20%	15.10%	19.65%	16.58%	13.60%	1.20%
Communications Services	0.34%	5.69%	7.28%	18.49%	11.13%	22.93%	27.78%	17.03%	11.98%	0.71%
Consumer Discretionary	-0.86%	1.69%	2.23%	11.52%	-3.87%	18.33%	18.59%	11.62%	12.38%	0.61%
Consumer Staples	0.47%	-0.44%	-1.89%	1.11%	6.40%	12.11%	8.92%	11.16%	9.16%	2.25%
Energy	-0.66%	-1.62%	4.85%	-8.56%	0.77%	-3.94%	9.71%	22.46%	5.47%	3.41%
Financials	0.88%	3.10%	3.19%	5.52%	9.23%	29.32%	20.69%	19.92%	12.42%	1.42%
Health Care	0.63%	2.02%	2.05%	-7.18%	-1.11%	-5.88%	3.45%	7.90%	8.00%	1.80%
Industrials	0.52%	2.58%	3.57%	12.94%	12.72%	22.79%	21.06%	18.37%	12.38%	1.24%
Materials	0.12%	1.18%	2.32%	3.13%	6.03%	1.85%	8.40%	11.52%	8.42%	1.89%
Real Estate	0.76%	-1.48%	0.16%	-0.07%	3.51%	11.62%	4.16%	7.15%	7.56%	3.32%
Technology	0.98%	4.63%	9.77%	23.71%	8.05%	15.04%	31.69%	22.94%	23.12%	0.57%
Utilities	0.40%	0.52%	0.32%	4.26%	9.41%	23.30%	8.60%	11.11%	10.62%	2.84%
DJIA	0.63%	3.56%	4.47%	5.46%	4.55%	14.66%	14.95%	13.48%	12.02%	1.64%
NASDAQ	0.48%	3.77%	6.64%	17.96%	5.85%	15.61%	23.60%	15.98%	15.54%	0.70%
Russell 3000	0.52%	2.96%	5.08%	10.99%	5.75%	15.23%	19.03%	15.91%	12.91%	1.20%
Russell 1000 Growth	0.68%	4.05%	6.38%	17.84%	6.09%	17.15%	25.68%	18.09%	16.95%	0.54%
Russell 1000 Value	0.39%	1.72%	3.42%	3.79%	6.00%	13.65%	12.73%	13.89%	9.15%	1.99%
Russell Midcap	0.50%	1.90%	3.73%	8.53%	4.84%	15.14%	14.29%	13.07%	9.85%	1.49%
Russell 2500	0.17%	1.97%	4.61%	8.59%	0.44%	9.87%	11.28%	11.41%	8.36%	1.41%
Russell 2000	0.16%	2.05%	5.44%	8.50%	-1.79%	7.65%	9.97%	10.00%	7.10%	1.32%
MSCI AC World	0.35%	3.17%	4.53%	11.69%	10.33%	16.62%	17.86%	14.13%	10.51%	1.66%
MSCI AC World ex USA	-0.04%	3.34%	3.45%	12.30%	18.32%	18.30%	14.55%	10.65%	6.61%	2.53%
MSCI EAFE	0.04%	3.43%	2.22%	12.07%	19.92%	18.26%	16.52%	11.68%	7.01%	2.76%
MSCI Europe	-0.28%	2.89%	2.08%	11.80%	23.69%	19.05%	17.90%	13.04%	7.40%	2.83%
MSCI Japan	0.79%	5.35%	1.73%	11.39%	11.95%	14.24%	15.42%	9.12%	6.43%	2.28%
MSCI EM (Emerging Markets)	-0.43%	3.58%	6.14%	12.20%	15.57%	15.90%	10.20%	7.24%	5.21%	2.05%
MSCI EM Asia	-0.84%	3.34%	6.41%	12.63%	14.24%	15.54%	9.91%	6.92%	6.04%	1.66%
MSCI EM Eastern Europe	1.24%	7.88%	6.56%	17.40%	50.61%	36.54%	33.81%	-11.08%	-2.97%	#N/A
MSCI EM Latin America	1.28%	3.92%	6.13%	15.42%	30.22%	13.91%	12.20%	11.58%	4.10%	3.87%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.36%	0.80%	1.54%	1.21%	4.02%	6.05%	2.54%	-0.72%	1.75%	4.51%
Bloomberg Municipal State GO (10 Y)	0.07%	0.20%	0.81%	0.94%	0.95%	2.18%	2.40%	0.52%	2.33%	3.52%
Barclays US High Yield	0.26%	0.89%	1.84%	3.53%	4.57%	10.24%	9.90%	5.95%	5.36%	7.06%
Bloomberg Global Aggregate USD	0.35%	0.79%	1.53%	1.25%	4.04%	6.14%	2.74%	-0.58%	1.85%	4.55%
Bbg EM Gov't Diversified	0.38%	2.22%	2.83%	7.77%	11.50%	13.49%	7.60%	0.79%	1.78%	6.23%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.67%	-1.42%	0.07%	-0.96%	1.91%	9.12%	3.37%	6.65%	6.42%	3.87%
Alerian MLP	-0.17%	0.36%	2.56%	-4.91%	7.06%	13.10%	26.03%	27.87%	5.60%	6.99%
Bloomberg Commodity	-0.81%	-2.82%	2.41%	-3.08%	5.53%	5.74%	0.13%	12.64%	1.98%	
US Dollar Index	-0.55%	-1.50%	-2.08%	-5.88%	-8.63%	-3.59%	2.56%	2.74%	2.20%	
Interest Rates	6/30/25	6/23/25	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	3.72%	3.84%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.79%	3.91%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.24%	4.34%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.60%	2.50%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.44%	1.40%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.88%	9.00%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.80%	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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