



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.11%	1.76%	-0.11%	-0.11%	6.09%	14.67%	19.19%	16.44%	13.50%	1.19%
Communications Services	-1.19%	2.99%	-1.19%	-1.19%	9.82%	21.36%	26.99%	16.24%	11.79%	0.71%
Consumer Discretionary	0.18%	1.15%	0.18%	0.18%	-3.70%	17.68%	17.89%	11.27%	12.28%	0.62%
Consumer Staples	0.76%	0.35%	0.76%	0.76%	7.21%	13.72%	8.68%	11.32%	9.11%	2.24%
Energy	0.80%	0.69%	0.80%	0.80%	1.58%	-3.19%	9.48%	23.28%	5.70%	3.43%
Financials	0.54%	2.12%	0.54%	0.54%	9.82%	29.72%	20.34%	20.29%	12.33%	1.40%
Health Care	1.40%	2.23%	1.40%	1.40%	0.27%	-4.04%	3.51%	8.05%	8.06%	1.79%
Industrials	0.30%	2.01%	0.30%	0.30%	13.06%	24.51%	20.82%	18.55%	12.37%	1.23%
Materials	2.32%	2.76%	2.32%	2.32%	8.49%	5.80%	8.99%	11.99%	8.62%	1.89%
Real Estate	0.61%	-1.30%	0.61%	0.61%	4.15%	13.34%	3.74%	6.74%	7.47%	3.29%
Technology	-1.13%	1.81%	-1.13%	-1.13%	6.84%	12.30%	31.09%	22.64%	22.90%	0.57%
Utilities	0.34%	0.46%	0.34%	0.34%	9.78%	24.57%	7.83%	10.68%	10.59%	2.83%
DJIA	0.91%	3.26%	0.91%	0.91%	5.50%	15.55%	14.89%	13.75%	12.02%	1.63%
NASDAQ	-0.82%	1.47%	-0.82%	-0.82%	4.98%	13.73%	22.89%	15.57%	15.38%	0.64%
Russell 3000	-0.06%	1.72%	-0.06%	-0.06%	5.69%	14.98%	18.56%	15.79%	12.83%	1.19%
Russell 1000 Growth	-1.05%	1.51%	-1.05%	-1.05%	4.98%	14.84%	24.83%	17.54%	16.73%	0.50%
Russell 1000 Value	0.89%	1.80%	0.89%	0.89%	6.94%	15.38%	12.58%	14.14%	9.19%	1.90%
Russell Midcap	0.72%	1.47%	0.72%	0.72%	5.59%	16.95%	14.03%	13.22%	9.87%	1.55%
Russell 2500	1.01%	1.80%	1.01%	1.01%	1.45%	11.97%	11.15%	11.75%	8.43%	1.46%
Russell 2000	1.04%	1.74%	1.04%	1.04%	-0.77%	9.70%	9.93%	10.44%	7.19%	1.37%
MSCI AC World	-0.05%	1.64%	-0.05%	-0.05%	10.28%	16.30%	17.69%	14.02%	10.44%	1.65%
MSCI AC World ex USA	0.17%	1.47%	0.17%	0.17%	18.51%	18.30%	14.89%	10.61%	6.58%	2.51%
MSCI EAFE	0.02%	1.48%	0.02%	0.02%	19.94%	17.99%	16.82%	11.64%	6.93%	2.73%
MSCI Europe	0.12%	1.16%	0.12%	0.12%	23.85%	18.69%	18.19%	12.95%	7.30%	2.80%
MSCI Japan	-0.24%	2.91%	-0.24%	-0.24%	11.69%	13.92%	15.67%	9.24%	6.42%	2.24%
MSCI EM (Emerging Markets)	0.56%	1.59%	0.56%	0.56%	16.22%	16.39%	10.69%	7.22%	5.27%	2.04%
MSCI EM Asia	0.59%	1.38%	0.59%	0.59%	14.91%	15.97%	10.43%	6.96%	6.06%	1.66%
MSCI EM Eastern Europe	-0.38%	3.60%	-0.38%	-0.38%	50.04%	36.31%	34.36%	-11.28%	-2.93%	#N/A
MSCI EM Latin America	0.80%	2.93%	0.80%	0.80%	31.26%	14.77%	12.81%	11.14%	4.28%	3.87%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.04%	0.42%	-0.04%	-0.04%	3.98%	6.62%	2.32%	-0.73%	1.79%	4.54%
Bloomberg Municipal State GO (10 Y)	0.19%	0.35%	0.19%	0.19%	1.14%	2.55%	2.34%	0.56%	2.33%	3.49%
Barclays US High Yield	0.08%	0.65%	0.08%	0.08%	4.65%	10.48%	9.86%	5.91%	5.34%	7.01%
Bloomberg Global Aggregate USD	-0.04%	0.42%	-0.04%	-0.04%	4.01%	6.70%	2.52%	-0.58%	1.88%	4.58%
Bbg EM Gov't Diversified	0.37%	1.40%	0.37%	0.37%	11.91%	14.11%	7.79%	0.79%	1.84%	6.19%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.61%	-1.08%	0.61%	0.61%	2.54%	10.83%	2.95%	6.31%	6.33%	3.86%
Alerian MLP	-1.02%	-0.60%	-1.02%	-1.02%	5.97%	11.17%	25.06%	27.88%	5.60%	7.00%
Bloomberg Commodity	0.16%	-0.22%	0.16%	0.16%	5.70%	5.52%	0.16%	12.60%	2.10%	
US Dollar Index	-0.55%	-0.96%	0.00%	0.00%	-8.63%	-3.62%	2.41%	2.78%	2.11%	
Interest Rates	7/1/25	6/24/25	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	3.78%	3.75%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.84%	3.86%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.26%	4.30%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.58%	2.53%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.39%	1.42%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.78%	8.85%	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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