



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.61%	0.59%	0.96%	0.96%	7.23%	13.76%	18.82%	16.41%	13.76%	1.19%
Communications Services	0.93%	0.11%	-0.98%	-0.98%	10.05%	18.25%	24.95%	15.64%	11.96%	0.72%
Consumer Discretionary	0.73%	-0.42%	0.52%	0.52%	-3.37%	14.36%	16.27%	10.44%	12.43%	0.62%
Consumer Staples	-0.55%	-1.32%	-0.58%	-0.58%	5.79%	10.80%	8.35%	10.79%	8.87%	2.25%
Energy	-0.50%	1.44%	3.99%	3.99%	4.80%	2.71%	11.50%	25.75%	6.19%	3.28%
Financials	0.30%	-0.42%	0.02%	0.02%	9.25%	27.43%	19.86%	20.44%	12.45%	1.41%
Health Care	0.43%	0.12%	0.54%	0.54%	-0.58%	-4.81%	2.94%	7.85%	8.09%	1.79%
Industrials	0.70%	1.20%	1.61%	1.61%	14.53%	25.84%	21.40%	19.31%	12.66%	1.22%
Materials	0.54%	0.02%	3.70%	3.70%	9.95%	6.83%	10.00%	12.09%	9.12%	1.84%
Real Estate	-0.03%	-0.87%	-0.10%	-0.10%	3.41%	11.52%	3.82%	7.06%	7.25%	3.30%
Technology	0.93%	1.81%	1.97%	1.97%	10.19%	12.10%	30.54%	22.60%	23.56%	0.56%
Utilities	1.00%	0.86%	0.32%	0.32%	9.76%	22.54%	8.85%	11.07%	10.32%	2.85%
DJIA	0.49%	-0.02%	0.86%	0.86%	5.45%	15.08%	14.55%	13.75%	12.15%	1.60%
NASDAQ	0.94%	1.08%	1.20%	1.20%	7.12%	12.57%	21.86%	15.16%	15.78%	0.64%
Russell 3000	0.64%	0.64%	1.13%	1.13%	6.94%	14.47%	18.19%	15.79%	13.11%	1.18%
Russell 1000 Growth	0.97%	1.27%	1.03%	1.03%	7.18%	13.91%	24.13%	17.18%	17.11%	0.49%
Russell 1000 Value	0.25%	-0.06%	1.01%	1.01%	7.07%	15.19%	12.48%	14.40%	9.35%	1.89%
Russell Midcap	0.47%	0.43%	1.70%	1.70%	6.62%	17.88%	13.84%	13.49%	10.12%	1.53%
Russell 2500	0.73%	0.87%	2.98%	2.98%	3.43%	14.34%	11.14%	12.48%	8.81%	1.43%
Russell 2000	1.07%	1.19%	3.58%	3.58%	1.73%	12.46%	9.95%	11.44%	7.64%	1.34%
MSCI AC World	0.55%	0.44%	0.74%	0.74%	11.14%	15.16%	17.33%	13.70%	10.75%	1.62%
MSCI AC World ex USA	0.41%	0.15%	0.38%	0.38%	18.77%	16.61%	14.59%	9.96%	6.91%	2.48%
MSCI EAFE	0.77%	0.29%	0.33%	0.33%	20.32%	16.87%	16.54%	11.43%	7.19%	2.70%
MSCI Europe	0.96%	1.15%	1.41%	1.41%	25.44%	19.62%	18.51%	13.01%	7.64%	2.76%
MSCI Japan	0.63%	-1.85%	-2.73%	-2.73%	8.90%	7.55%	14.00%	8.33%	6.37%	2.23%
MSCI EM (Emerging Markets)	-0.27%	-0.08%	0.61%	0.61%	16.27%	13.56%	10.33%	5.57%	5.85%	2.02%
MSCI EM Asia	-0.33%	-0.17%	0.56%	0.56%	14.88%	13.07%	9.99%	5.01%	6.73%	1.67%
MSCI EM Eastern Europe	0.73%	1.97%	1.70%	1.70%	53.17%	37.68%	35.45%	-11.24%	-2.38%	#N/A
MSCI EM Latin America	-0.86%	-1.62%	-0.57%	-0.57%	29.47%	8.66%	11.93%	10.24%	4.50%	3.80%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.38%	-0.23%	-0.40%	-0.40%	3.61%	4.88%	2.50%	-0.93%	1.69%	4.61%
Bloomberg Municipal State GO (10 Y)	0.06%	0.09%	0.37%	0.37%	1.33%	2.34%	2.12%	0.52%	2.33%	3.46%
Barclays US High Yield	0.10%	-0.05%	0.09%	0.09%	4.66%	9.83%	9.37%	5.73%	5.39%	7.07%
Bloomberg Global Aggregate USD	0.37%	-0.22%	-0.37%	-0.37%	3.65%	5.01%	2.70%	-0.79%	1.79%	4.64%
Bbg EM Gov't Diversified	0.09%	-0.27%	0.00%	0.00%	11.49%	12.05%	7.99%	0.62%	1.89%	6.20%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.02%	-0.88%	0.06%	0.06%	1.98%	9.18%	3.03%	6.88%	6.15%	3.86%
Alerian MLP	-0.07%	-0.38%	-0.05%	-0.05%	7.00%	12.10%	25.39%	29.89%	5.60%	7.00%
Bloomberg Commodity	-0.57%	-0.82%	0.85%	0.85%	6.43%	6.79%	0.72%	12.36%	2.43%	
US Dollar Index	0.07%	0.89%	0.86%	0.86%	-7.85%	-2.20%	2.08%	3.06%	2.17%	
Interest Rates	7/9/25	7/2/25	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	3.86%	3.78%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.92%	3.87%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.34%	4.30%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.67%	2.63%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.49%	1.43%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.95%	8.75%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.74%	6.79%	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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