



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.29%	0.04%	1.26%	1.26%	7.54%	12.92%	18.90%	16.24%	13.66%	1.18%
Communications Services	-0.38%	-0.87%	-1.36%	-1.36%	9.63%	16.87%	24.75%	15.10%	11.78%	0.72%
Consumer Discretionary	0.98%	-0.20%	1.51%	1.51%	-2.42%	14.73%	16.62%	10.43%	12.38%	0.61%
Consumer Staples	0.13%	-1.40%	-0.45%	-0.45%	5.92%	10.43%	8.38%	10.41%	8.77%	2.26%
Energy	0.79%	1.99%	4.81%	4.81%	5.63%	2.78%	11.77%	25.14%	6.22%	3.27%
Financials	0.64%	-0.91%	0.66%	0.66%	9.96%	27.71%	20.08%	19.77%	12.39%	1.39%
Health Care	0.63%	0.61%	1.17%	1.17%	0.05%	-5.14%	3.15%	8.03%	8.01%	1.77%
Industrials	0.52%	0.90%	2.14%	2.14%	15.13%	25.37%	21.58%	19.13%	12.61%	1.21%
Materials	0.46%	0.49%	4.18%	4.18%	10.46%	5.92%	10.16%	11.81%	9.01%	1.82%
Real Estate	0.49%	-0.50%	0.40%	0.40%	3.92%	11.25%	3.98%	7.13%	7.24%	3.28%
Technology	-0.11%	0.39%	1.86%	1.86%	10.06%	10.19%	30.45%	22.58%	23.35%	0.56%
Utilities	0.78%	0.89%	1.10%	1.10%	10.62%	22.34%	9.12%	10.83%	10.34%	2.80%
DJIA	0.44%	-0.39%	1.31%	1.31%	5.91%	14.33%	14.69%	13.53%	12.06%	1.60%
NASDAQ	0.09%	0.15%	1.29%	1.29%	7.22%	11.36%	21.87%	15.03%	15.62%	0.64%
Russell 3000	0.27%	0.05%	1.40%	1.40%	7.23%	13.64%	18.27%	15.60%	13.00%	1.17%
Russell 1000 Growth	-0.03%	0.10%	1.00%	1.00%	7.15%	12.74%	24.09%	17.09%	16.94%	0.49%
Russell 1000 Value	0.56%	-0.06%	1.58%	1.58%	7.68%	14.71%	12.67%	14.12%	9.30%	1.88%
Russell Midcap	0.46%	0.27%	2.17%	2.17%	7.11%	17.38%	13.99%	13.35%	10.06%	1.52%
Russell 2500	0.54%	0.59%	3.53%	3.53%	3.99%	13.80%	11.33%	12.30%	8.73%	1.43%
Russell 2000	0.49%	0.65%	4.09%	4.09%	2.23%	11.78%	10.11%	11.17%	7.54%	1.33%
MSCI AC World	0.22%	-0.01%	0.96%	0.96%	11.39%	14.42%	17.39%	13.61%	10.61%	1.62%
MSCI AC World ex USA	0.19%	0.01%	0.57%	0.57%	18.99%	16.14%	14.64%	10.00%	6.74%	2.49%
MSCI EAFE	0.10%	0.29%	0.43%	0.43%	20.44%	16.09%	16.56%	11.36%	7.00%	2.71%
MSCI Europe	0.26%	1.09%	1.67%	1.67%	25.76%	18.76%	18.59%	12.82%	7.33%	2.76%
MSCI Japan	-0.63%	-1.87%	-3.35%	-3.35%	8.21%	6.44%	13.75%	8.37%	6.39%	2.26%
MSCI EM (Emerging Markets)	0.29%	-0.40%	0.90%	0.90%	16.61%	13.92%	10.42%	5.83%	5.73%	2.03%
MSCI EM Asia	0.52%	-0.13%	1.08%	1.08%	15.47%	13.79%	10.16%	5.38%	6.65%	1.67%
MSCI EM Eastern Europe	-1.68%	-1.86%	0.00%	0.00%	50.61%	35.91%	34.64%	-11.70%	-2.74%	#N/A
MSCI EM Latin America	-1.44%	-3.97%	-2.01%	-2.01%	27.60%	5.66%	11.37%	9.92%	4.13%	3.67%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.00%	0.04%	-0.40%	-0.40%	3.60%	4.80%	2.49%	-0.91%	1.74%	4.62%
Bloomberg Municipal State GO (10 Y)	0.02%	0.18%	0.39%	0.39%	1.35%	2.46%	2.12%	0.50%	2.33%	3.46%
Barclays US High Yield	0.04%	-0.08%	0.13%	0.13%	4.70%	9.74%	9.37%	5.75%	5.38%	7.06%
Bloomberg Global Aggregate USD	0.00%	0.04%	-0.37%	-0.37%	3.65%	4.93%	2.69%	-0.76%	1.84%	4.65%
Bbg EM Gov't Diversified	-0.02%	-0.66%	-0.02%	-0.02%	11.47%	11.64%	7.98%	0.61%	1.82%	6.20%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.51%	-0.51%	0.58%	0.58%	2.50%	8.82%	3.20%	6.89%	6.11%	3.87%
Alerian MLP	-0.01%	-0.61%	-0.06%	-0.06%	6.99%	12.34%	25.35%	29.51%	5.60%	7.01%
Bloomberg Commodity	0.33%	-0.19%	1.18%	1.18%	6.78%	7.38%	0.83%	12.33%	2.44%	
US Dollar Index	0.15%	0.59%	0.97%	0.97%	-7.75%	-2.02%	2.11%	3.10%	2.24%	
Interest Rates	7/10/25	7/3/25	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%	3.88%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.93%	3.94%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.35%	4.35%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.70%	2.58%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.49%	1.45%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.90%	8.81%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.73%	6.78%	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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