



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.14%	0.64%	1.06%	1.06%	7.33%	13.08%	20.00%	16.10%	13.46%	1.19%
Communications Services	0.73%	0.55%	-0.83%	-0.83%	10.21%	21.48%	27.33%	15.48%	11.72%	0.72%
Consumer Discretionary	0.37%	1.79%	2.22%	2.22%	-1.74%	16.14%	18.01%	10.84%	12.28%	0.61%
Consumer Staples	0.13%	-1.75%	-0.70%	-0.70%	5.66%	10.08%	8.42%	10.07%	8.62%	2.27%
Energy	-1.20%	2.27%	4.06%	4.06%	4.86%	0.76%	13.39%	24.22%	5.99%	3.30%
Financials	0.67%	-0.29%	0.33%	0.33%	9.59%	25.94%	21.75%	19.45%	12.18%	1.41%
Health Care	-0.10%	0.51%	0.18%	0.18%	-0.93%	-7.27%	3.79%	7.28%	7.71%	1.79%
Industrials	0.54%	1.47%	2.38%	2.38%	15.40%	23.44%	22.87%	18.57%	12.48%	1.21%
Materials	-0.44%	0.34%	2.94%	2.94%	9.14%	2.25%	10.82%	10.99%	8.71%	1.87%
Real Estate	0.67%	0.92%	1.00%	1.00%	4.54%	8.28%	4.93%	7.40%	7.26%	3.27%
Technology	-0.25%	0.74%	1.39%	1.39%	9.55%	11.72%	31.23%	22.70%	23.05%	0.56%
Utilities	0.35%	0.93%	1.34%	1.34%	10.87%	19.56%	9.33%	10.66%	10.38%	2.81%
DJIA	0.20%	0.13%	0.87%	0.87%	5.46%	13.05%	15.44%	12.94%	11.83%	1.60%
NASDAQ	0.27%	1.12%	1.34%	1.34%	7.27%	12.92%	23.32%	15.32%	15.38%	#N/A
Russell 3000	0.23%	0.67%	1.20%	1.20%	7.02%	13.27%	19.44%	15.51%	12.81%	1.18%
Russell 1000 Growth	0.28%	0.86%	1.02%	1.02%	7.18%	14.56%	25.43%	17.31%	16.74%	0.50%
Russell 1000 Value	0.13%	0.39%	1.19%	1.19%	7.27%	12.36%	13.67%	13.72%	9.11%	1.89%
Russell Midcap	0.36%	0.61%	1.70%	1.70%	6.62%	13.92%	15.10%	13.15%	9.86%	1.53%
Russell 2500	0.46%	1.18%	2.90%	2.90%	3.36%	8.95%	12.37%	12.12%	8.50%	1.43%
Russell 2000	0.67%	1.62%	3.46%	3.46%	1.62%	6.14%	11.22%	10.95%	7.29%	1.33%
MSCI AC World	0.10%	0.40%	0.66%	0.66%	11.06%	13.56%	18.59%	13.47%	10.42%	1.63%
MSCI AC World ex USA	-0.06%	0.04%	0.02%	0.02%	18.34%	13.49%	15.88%	9.79%	6.55%	2.48%
MSCI EAFE	-0.19%	-0.11%	-0.41%	-0.41%	19.43%	12.72%	17.66%	10.97%	6.76%	2.69%
MSCI Europe	-0.16%	0.12%	0.57%	0.57%	24.40%	14.90%	19.91%	12.37%	7.12%	2.73%
MSCI Japan	-0.14%	-1.05%	-3.71%	-3.71%	7.80%	4.46%	14.39%	8.02%	6.06%	2.27%
MSCI EM (Emerging Markets)	-0.03%	0.26%	0.70%	0.70%	16.38%	12.43%	11.63%	5.98%	5.61%	2.03%
MSCI EM Asia	0.04%	0.75%	1.02%	1.02%	15.40%	12.44%	11.27%	5.55%	6.58%	1.65%
MSCI EM Eastern Europe	0.37%	-0.13%	0.59%	0.59%	51.50%	33.24%	38.38%	-11.14%	-2.80%	#N/A
MSCI EM Latin America	-0.49%	-3.71%	-3.18%	-3.18%	26.07%	3.42%	13.41%	9.85%	3.77%	3.92%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.03%	-0.14%	-0.84%	-0.84%	3.15%	3.57%	2.16%	-1.03%	1.68%	4.68%
Bloomberg Municipal State GO (10 Y)	-0.10%	-0.03%	0.27%	0.27%	1.23%	1.90%	1.98%	0.42%	2.33%	3.48%
Barclays US High Yield	0.01%	-0.13%	-0.01%	-0.01%	4.56%	9.06%	9.45%	5.66%	5.35%	7.15%
Bloomberg Global Aggregate USD	-0.03%	-0.13%	-0.80%	-0.80%	3.22%	3.73%	2.38%	-0.88%	1.78%	4.71%
Bbg EM Gov't Diversified	-0.23%	-0.45%	-0.36%	-0.36%	11.10%	10.25%	8.58%	0.58%	1.77%	6.23%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.63%	1.09%	1.23%	1.23%	3.17%	5.96%	4.10%	7.10%	6.14%	3.82%
Alerian MLP	0.35%	0.91%	0.39%	0.39%	7.48%	12.22%	26.45%	30.17%	5.60%	7.07%
Bloomberg Commodity	-0.02%	1.17%	1.88%	1.88%	7.51%	7.76%	2.30%	12.64%	2.50%	
US Dollar Index	0.29%	0.70%	1.49%	1.49%	-7.27%	-0.67%	1.80%	3.29%	2.23%	
Interest Rates	7/14/25	7/7/25	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	3.90%	3.90%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.98%	3.96%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.43%	4.40%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.73%	2.64%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.57%	1.45%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.97%	8.91%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.75%	6.74%	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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