



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.39%	0.32%	0.67%	0.67%	6.92%	12.31%	19.09%	15.80%	13.42%	1.19%
Communications Services	-0.62%	0.46%	-1.45%	-1.45%	9.53%	20.35%	26.17%	15.27%	11.72%	0.73%
Consumer Discretionary	-1.09%	1.32%	1.10%	1.10%	-2.81%	15.23%	16.92%	10.49%	12.17%	0.62%
Consumer Staples	-0.82%	-1.49%	-1.52%	-1.52%	4.79%	9.83%	7.98%	9.88%	8.56%	2.27%
Energy	-1.35%	-1.78%	2.66%	2.66%	3.45%	-2.11%	12.18%	23.40%	6.02%	3.35%
Financials	-1.64%	-1.04%	-1.32%	-1.32%	7.79%	22.15%	19.70%	18.61%	11.92%	1.43%
Health Care	-1.80%	-1.73%	-1.62%	-1.62%	-2.71%	-8.60%	2.34%	6.61%	7.51%	1.83%
Industrials	-0.76%	0.69%	1.60%	1.60%	14.52%	21.65%	21.91%	17.80%	12.44%	1.22%
Materials	-2.09%	-2.28%	0.79%	0.79%	6.86%	0.40%	9.45%	10.16%	8.57%	1.91%
Real Estate	-1.28%	-0.22%	-0.30%	-0.30%	3.21%	6.45%	3.90%	7.01%	7.11%	3.31%
Technology	1.27%	1.63%	2.67%	2.67%	10.94%	12.68%	31.02%	22.88%	23.19%	0.56%
Utilities	-0.92%	1.08%	0.40%	0.40%	9.85%	21.35%	8.92%	10.55%	10.22%	2.84%
DJIA	-0.98%	-0.48%	-0.12%	-0.12%	4.43%	11.36%	14.26%	12.53%	11.73%	1.60%
NASDAQ	0.18%	1.27%	1.53%	1.53%	7.47%	12.67%	22.67%	15.22%	15.41%	#N/A
Russell 3000	-0.53%	0.18%	0.66%	0.66%	6.45%	12.22%	18.46%	15.12%	12.77%	1.19%
Russell 1000 Growth	0.26%	1.22%	1.28%	1.28%	7.45%	14.49%	24.81%	17.27%	16.78%	0.49%
Russell 1000 Value	-1.24%	-0.81%	-0.06%	-0.06%	5.94%	10.59%	12.41%	13.06%	9.00%	1.91%
Russell Midcap	-1.39%	-0.93%	0.29%	0.29%	5.14%	11.96%	13.82%	12.34%	9.76%	1.54%
Russell 2500	-1.73%	-1.08%	1.12%	1.12%	1.57%	5.93%	10.99%	11.04%	8.38%	1.45%
Russell 2000	-1.98%	-1.05%	1.41%	1.41%	-0.40%	2.20%	9.70%	9.75%	7.15%	1.36%
MSCI AC World	-0.34%	0.13%	0.32%	0.32%	10.68%	13.14%	17.82%	13.13%	10.39%	1.66%
MSCI AC World ex USA	-0.25%	-0.20%	-0.23%	-0.23%	18.05%	13.75%	15.35%	9.41%	6.53%	2.49%
MSCI EAFE	-0.75%	-0.72%	-1.15%	-1.15%	18.54%	12.60%	16.67%	10.39%	6.68%	2.71%
MSCI Europe	-0.93%	-0.80%	-0.36%	-0.36%	23.25%	14.95%	18.52%	11.74%	7.02%	2.75%
MSCI Japan	-0.73%	-1.10%	-4.41%	-4.41%	7.02%	3.80%	13.92%	7.45%	5.98%	2.28%
MSCI EM (Emerging Markets)	0.97%	0.79%	1.68%	1.68%	17.51%	13.82%	12.12%	6.03%	5.73%	2.12%
MSCI EM Asia	1.19%	1.31%	2.22%	2.22%	16.77%	14.23%	11.99%	5.71%	6.72%	1.74%
MSCI EM Eastern Europe	-0.77%	-1.15%	-0.19%	-0.19%	50.33%	31.49%	36.93%	-11.51%	-2.92%	#N/A
MSCI EM Latin America	0.20%	-3.27%	-2.99%	-2.99%	26.33%	3.95%	12.73%	9.30%	3.89%	3.95%
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	-1.34%	-0.20%	-0.12%	-0.12%	1.79%	3.94%	3.06%	6.58%	5.99%	3.87%
Alerian MLP	-0.62%	-0.25%	-0.23%	-0.23%	6.81%	10.61%	25.38%	28.72%	5.60%	7.11%
Bloomberg Commodity	-0.09%	0.35%	1.79%	1.79%	7.42%	8.85%	1.74%	12.46%	2.59%	
US Dollar Index	0.85%	1.22%	2.05%	2.05%	-6.76%	-0.26%	2.13%	3.43%	2.24%	
Interest Rates	7/15/25	7/8/25	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	3.95%	3.90%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.05%	3.99%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.50%	4.42%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.70%	2.69%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.58%	1.49%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.96%	8.95%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.75%	6.73%	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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