



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.54%	0.28%	1.54%	1.54%	7.84%	14.14%	19.38%	16.01%	13.42%	1.18%
Communications Services	0.36%	0.12%	-1.24%	-1.24%	9.76%	23.95%	26.18%	15.35%	11.64%	0.72%
Consumer Discretionary	0.31%	-0.11%	1.40%	1.40%	-2.53%	15.93%	16.99%	10.77%	12.16%	0.62%
Consumer Staples	0.87%	-0.03%	-0.48%	-0.48%	5.89%	8.40%	8.33%	9.97%	8.56%	2.25%
Energy	0.46%	-2.43%	2.26%	2.26%	3.06%	-3.88%	12.00%	23.79%	6.08%	3.35%
Financials	0.92%	-0.41%	0.25%	0.25%	9.51%	21.55%	20.27%	19.19%	12.01%	1.41%
Health Care	-1.18%	-2.73%	-1.60%	-1.60%	-2.69%	-10.31%	2.34%	6.36%	7.47%	1.83%
Industrials	0.87%	0.69%	2.84%	2.84%	15.93%	21.68%	22.35%	17.95%	12.52%	1.21%
Materials	0.60%	-2.39%	1.69%	1.69%	7.82%	-0.44%	9.75%	10.10%	8.77%	1.89%
Real Estate	-0.16%	0.21%	0.61%	0.61%	4.14%	5.48%	4.20%	7.16%	7.17%	3.33%
Technology	0.89%	1.97%	3.87%	3.87%	12.23%	18.82%	31.43%	23.34%	22.96%	0.55%
Utilities	0.37%	-0.27%	0.83%	0.83%	10.32%	20.89%	9.05%	9.86%	10.22%	2.83%
DJIA	0.52%	-0.37%	0.93%	0.93%	5.52%	9.84%	14.61%	12.93%	11.82%	1.62%
NASDAQ	0.75%	1.24%	2.55%	2.55%	8.55%	16.79%	23.01%	15.56%	15.28%	#N/A
Russell 3000	0.62%	0.27%	1.67%	1.67%	7.52%	13.95%	18.81%	15.36%	12.79%	1.17%
Russell 1000 Growth	0.63%	1.25%	2.26%	2.26%	8.49%	19.06%	25.13%	17.58%	16.73%	0.49%
Russell 1000 Value	0.56%	-0.70%	0.87%	0.87%	6.93%	9.50%	12.72%	13.20%	9.08%	1.89%
Russell Midcap	1.01%	-0.34%	1.83%	1.83%	6.75%	12.45%	14.36%	12.60%	9.92%	1.52%
Russell 2500	1.24%	-0.38%	3.14%	3.14%	3.59%	6.30%	11.69%	11.51%	8.59%	1.42%
Russell 2000	1.20%	-0.42%	3.65%	3.65%	1.80%	2.00%	10.47%	10.30%	7.37%	1.34%
MSCI AC World	0.57%	0.02%	0.98%	0.98%	11.41%	14.59%	18.03%	13.34%	10.39%	1.66%
MSCI AC World ex USA	0.61%	-0.54%	0.03%	0.03%	18.35%	14.35%	15.40%	9.62%	6.51%	2.57%
MSCI EAFE	0.79%	-1.36%	-0.93%	-0.93%	18.80%	12.97%	16.71%	10.58%	6.64%	2.79%
MSCI Europe	0.88%	-1.87%	-0.23%	-0.23%	23.41%	15.84%	18.52%	11.83%	6.99%	2.88%
MSCI Japan	0.68%	-0.41%	-3.74%	-3.74%	7.76%	2.94%	14.15%	7.88%	5.94%	2.28%
MSCI EM (Emerging Markets)	0.15%	0.86%	1.77%	1.77%	17.61%	14.80%	12.12%	6.27%	5.70%	2.10%
MSCI EM Asia	0.02%	1.09%	2.18%	2.18%	16.73%	15.17%	11.95%	5.96%	6.63%	1.72%
MSCI EM Eastern Europe	1.24%	1.07%	1.06%	1.06%	52.21%	38.52%	37.39%	-11.23%	-2.84%	#N/A
MSCI EM Latin America	0.48%	-0.39%	-2.40%	-2.40%	27.10%	4.86%	12.93%	9.44%	4.12%	4.10%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.02%	-0.55%	-0.95%	-0.95%	3.04%	3.29%	2.01%	-1.06%	1.65%	4.70%
Bloomberg Municipal State GO (10 Y)	-0.29%	-0.78%	-0.39%	-0.39%	0.56%	1.07%	1.72%	0.23%	2.33%	3.62%
Barclays US High Yield	0.11%	-0.10%	0.03%	0.03%	4.59%	8.65%	9.24%	5.49%	5.36%	7.12%
Bloomberg Global Aggregate USD	-0.01%	-0.52%	-0.89%	-0.89%	3.12%	3.46%	2.24%	-0.92%	1.75%	4.73%
Bbg EM Gov't Diversified	-0.10%	-0.63%	-0.65%	-0.65%	10.77%	9.92%	8.20%	0.47%	1.80%	6.25%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.29%	-0.02%	0.56%	0.56%	2.48%	2.68%	3.28%	6.71%	6.02%	3.90%
Alerian MLP	0.09%	-0.53%	-0.60%	-0.60%	6.42%	9.72%	25.16%	28.76%	5.60%	7.14%
Bloomberg Commodity	0.41%	1.38%	2.58%	2.58%	8.26%	10.10%	2.00%	12.69%	2.76%	
US Dollar Index	0.15%	1.22%	2.19%	2.19%	-6.63%	0.30%	2.18%	3.50%	2.18%	
Interest Rates	7/16/25	7/9/25	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	3.88%	3.86%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.99%	3.92%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.46%	4.34%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.69%	2.67%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.59%	1.49%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.99%	8.90%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.76%	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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