



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.07%	1.07%	1.75%	1.75%	8.06%	14.85%	18.51%	15.69%	13.51%	1.18%
Communications Services	-0.31%	1.58%	0.11%	0.11%	11.26%	24.75%	27.32%	15.46%	12.07%	0.71%
Consumer Discretionary	0.67%	2.57%	3.70%	3.70%	-0.31%	20.01%	15.36%	10.59%	12.39%	0.60%
Consumer Staples	0.23%	1.05%	-0.48%	-0.48%	5.89%	9.26%	8.17%	9.80%	8.54%	2.25%
Energy	0.53%	-1.77%	0.84%	0.84%	1.62%	-3.61%	10.23%	22.74%	6.13%	3.37%
Financials	0.55%	1.92%	0.58%	0.58%	9.87%	23.99%	19.32%	18.93%	11.96%	1.41%
Health Care	1.92%	0.71%	-0.93%	-0.93%	-2.02%	-8.58%	2.69%	6.34%	7.54%	1.82%
Industrials	0.30%	0.76%	2.37%	2.37%	15.39%	21.42%	20.59%	17.62%	12.64%	1.22%
Materials	1.28%	3.10%	3.91%	3.91%	10.18%	3.33%	9.09%	10.33%	9.21%	1.85%
Real Estate	1.79%	3.45%	3.14%	3.14%	6.76%	8.08%	4.05%	7.64%	7.41%	3.25%
Technology	-1.08%	0.09%	2.77%	2.77%	11.05%	17.06%	29.52%	22.52%	23.03%	0.56%
Utilities	1.29%	3.76%	4.17%	4.17%	13.98%	23.76%	10.44%	10.44%	10.68%	2.74%
DJIA	0.40%	1.12%	1.01%	1.01%	5.60%	11.99%	13.93%	12.66%	11.97%	1.61%
NASDAQ	-0.39%	1.04%	2.58%	2.58%	8.58%	16.76%	21.75%	15.12%	15.37%	#N/A
Russell 3000	0.14%	1.19%	1.86%	1.86%	7.72%	14.65%	17.85%	15.03%	12.88%	1.17%
Russell 1000 Growth	-0.59%	0.63%	1.92%	1.92%	8.13%	18.48%	23.79%	17.01%	16.74%	0.49%
Russell 1000 Value	0.88%	1.73%	1.67%	1.67%	7.77%	11.52%	12.19%	13.11%	9.24%	1.88%
Russell Midcap	1.18%	2.44%	2.74%	2.74%	7.71%	13.87%	13.36%	12.47%	10.07%	1.52%
Russell 2500	1.09%	2.29%	3.43%	3.43%	3.89%	7.41%	10.38%	11.26%	8.69%	1.41%
Russell 2000	0.79%	1.99%	3.43%	3.43%	1.58%	2.64%	9.13%	10.00%	7.42%	1.34%
MSCI AC World	0.02%	1.05%	1.37%	1.37%	11.84%	15.96%	17.00%	13.08%	10.52%	1.65%
MSCI AC World ex USA	-0.05%	0.98%	0.75%	0.75%	19.20%	16.99%	14.21%	9.46%	6.70%	2.54%
MSCI EAFE	0.05%	1.03%	-0.13%	-0.13%	19.76%	15.45%	15.40%	10.50%	6.82%	2.77%
MSCI Europe	-0.21%	0.72%	0.36%	0.36%	24.14%	17.04%	17.16%	11.61%	7.16%	2.86%
MSCI Japan	0.77%	2.01%	-2.49%	-2.49%	9.17%	8.03%	12.71%	8.17%	6.14%	2.27%
MSCI EM (Emerging Markets)	-0.42%	0.66%	2.35%	2.35%	18.29%	18.17%	11.27%	5.94%	5.88%	2.08%
MSCI EM Asia	-0.45%	0.67%	2.91%	2.91%	17.56%	19.26%	11.30%	5.72%	6.78%	1.70%
MSCI EM Eastern Europe	-0.65%	2.91%	2.72%	2.72%	54.70%	39.36%	35.03%	-11.55%	-2.52%	#N/A
MSCI EM Latin America	-0.22%	-0.99%	-3.95%	-3.95%	25.08%	5.20%	11.67%	7.94%	4.24%	4.14%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.19%	0.85%	-0.28%	-0.28%	3.73%	4.54%	1.84%	-1.00%	1.70%	4.60%
Bloomberg Municipal State GO (10 Y)	0.10%	-0.15%	-0.24%	-0.24%	0.71%	1.20%	1.66%	0.19%	2.33%	3.60%
Barclays US High Yield	0.09%	0.51%	0.43%	0.43%	5.02%	9.06%	8.53%	5.29%	5.49%	7.03%
Bloomberg Global Aggregate USD	0.19%	0.83%	-0.24%	-0.24%	3.80%	4.68%	2.08%	-0.86%	1.80%	4.63%
Bbg EM Gov't Diversified	0.17%	0.40%	0.01%	0.01%	11.50%	11.24%	8.03%	0.31%	1.91%	6.21%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	1.81%	3.02%	2.90%	2.90%	4.87%	5.09%	3.10%	7.04%	6.25%	3.82%
Alerian MLP	0.42%	-0.44%	-0.67%	-0.67%	6.34%	8.79%	24.10%	27.96%	5.60%	7.15%
Bloomberg Commodity	-0.02%	1.08%	2.88%	2.88%	8.57%	11.60%	1.19%	12.34%	3.03%	
US Dollar Index	-1.06%	-1.13%	0.89%	0.89%	-7.82%	-1.59%	2.16%	3.45%	2.08%	
Interest Rates	7/22/25	7/15/25	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	3.83%	3.95%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.88%	4.05%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.35%	4.50%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.60%	2.70%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.50%	1.58%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.07%	8.99%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.79%	6.75%	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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