



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.78%	1.53%	2.54%	2.54%	8.90%	15.93%	18.79%	16.15%	13.66%	1.17%
Communications Services	0.28%	2.02%	0.39%	0.39%	11.57%	25.38%	27.40%	15.98%	12.16%	0.71%
Consumer Discretionary	0.42%	3.02%	4.14%	4.14%	0.11%	20.49%	15.50%	11.13%	12.50%	0.60%
Consumer Staples	-0.07%	0.79%	-0.55%	-0.55%	5.81%	9.53%	8.13%	9.72%	8.58%	2.25%
Energy	1.53%	0.58%	2.39%	2.39%	3.18%	-0.60%	10.78%	23.16%	6.32%	3.32%
Financials	0.72%	1.98%	1.30%	1.30%	10.66%	24.78%	19.58%	19.06%	12.13%	1.39%
Health Care	2.03%	1.52%	1.09%	1.09%	-0.03%	-6.70%	3.37%	6.85%	7.79%	1.78%
Industrials	1.75%	2.16%	4.16%	4.16%	17.41%	23.79%	21.25%	18.10%	12.94%	1.20%
Materials	0.10%	2.89%	4.02%	4.02%	10.28%	3.03%	9.11%	10.41%	9.38%	1.85%
Real Estate	0.18%	2.54%	3.32%	3.32%	6.95%	8.46%	4.10%	7.79%	7.48%	3.24%
Technology	0.74%	0.57%	3.53%	3.53%	11.87%	18.08%	29.80%	23.35%	23.15%	0.55%
Utilities	-0.79%	2.88%	3.35%	3.35%	13.08%	23.59%	10.13%	10.24%	10.76%	2.76%
DJIA	1.14%	1.74%	2.16%	2.16%	6.80%	13.43%	14.34%	13.21%	12.17%	1.60%
NASDAQ	0.61%	1.40%	3.21%	3.21%	9.25%	17.54%	21.97%	15.80%	15.49%	#N/A
Russell 3000	0.80%	1.62%	2.68%	2.68%	8.59%	15.63%	18.14%	15.48%	13.04%	1.16%
Russell 1000 Growth	0.81%	1.10%	2.74%	2.74%	9.00%	19.28%	24.09%	17.73%	16.90%	0.49%
Russell 1000 Value	0.72%	2.08%	2.40%	2.40%	8.55%	12.75%	12.44%	13.30%	9.38%	1.87%
Russell Midcap	0.68%	2.61%	3.43%	3.43%	8.44%	14.85%	13.60%	12.70%	10.20%	1.50%
Russell 2500	1.14%	2.68%	4.61%	4.61%	5.07%	8.13%	10.78%	11.53%	8.90%	1.40%
Russell 2000	1.53%	2.53%	5.01%	5.01%	3.14%	3.16%	9.67%	10.34%	7.69%	1.32%
MSCI AC World	1.03%	2.00%	2.42%	2.42%	13.00%	17.24%	17.38%	13.48%	10.67%	1.65%
MSCI AC World ex USA	1.49%	2.85%	2.26%	2.26%	20.99%	18.71%	14.75%	9.77%	6.85%	2.53%
MSCI EAFE	1.70%	3.34%	1.57%	1.57%	21.80%	17.38%	16.02%	10.85%	6.97%	2.76%
MSCI Europe	1.18%	2.68%	1.54%	1.54%	25.60%	18.67%	17.59%	11.86%	7.26%	2.85%
MSCI Japan	3.63%	5.69%	1.05%	1.05%	13.13%	11.19%	14.04%	8.90%	6.47%	2.26%
MSCI EM (Emerging Markets)	1.37%	2.11%	3.76%	3.76%	19.91%	19.61%	11.76%	6.22%	6.10%	2.08%
MSCI EM Asia	1.43%	2.18%	4.38%	4.38%	19.24%	20.55%	11.81%	5.96%	6.99%	1.71%
MSCI EM Eastern Europe	0.73%	3.65%	3.46%	3.46%	55.83%	42.32%	35.30%	-11.46%	-2.38%	#N/A
MSCI EM Latin America	1.28%	0.15%	-2.72%	-2.72%	26.68%	7.87%	12.13%	8.69%	4.62%	4.14%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.23%	0.42%	-0.51%	-0.51%	3.49%	4.29%	1.76%	-1.07%	1.66%	4.65%
Bloomberg Municipal State GO (10 Y)	0.09%	-0.05%	-0.15%	-0.15%	0.80%	1.26%	1.69%	0.19%	2.33%	3.58%
Barclays US High Yield	0.05%	0.57%	0.48%	0.48%	5.07%	8.98%	8.53%	5.27%	5.50%	7.01%
Bloomberg Global Aggregate USD	-0.22%	0.42%	-0.46%	-0.46%	3.57%	4.44%	2.00%	-0.93%	1.76%	4.68%
Bbg EM Gov't Diversified	0.24%	0.80%	0.25%	0.25%	11.77%	11.66%	8.11%	0.36%	1.99%	6.20%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.02%	2.04%	2.92%	2.92%	4.88%	5.12%	3.10%	7.17%	6.35%	3.82%
Alerian MLP	0.40%	0.41%	-0.28%	-0.28%	6.76%	9.85%	24.23%	28.27%	5.60%	7.12%
Bloomberg Commodity	-0.48%	0.22%	2.39%	2.39%	8.05%	11.72%	1.02%	12.10%	3.08%	
US Dollar Index	-0.62%	-1.10%	0.71%	0.71%	-7.99%	-1.90%	2.10%	3.47%	2.11%	
Interest Rates	7/23/25	7/16/25	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%	3.88%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.94%	3.99%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.40%	4.46%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.61%	2.69%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.58%	1.59%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.28%	8.98%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.79%	6.76%	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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