



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.07%	1.06%	2.62%	2.62%	8.98%	18.74%	18.79%	16.31%	13.79%	1.17%
Communications Services	0.51%	2.17%	0.91%	0.91%	12.14%	30.92%	27.58%	16.11%	12.23%	0.70%
Consumer Discretionary	-1.23%	1.45%	2.86%	2.86%	-1.12%	23.81%	15.01%	10.79%	12.37%	0.61%
Consumer Staples	-0.32%	-0.40%	-0.88%	-0.88%	5.47%	9.13%	8.00%	9.68%	8.60%	2.26%
Energy	0.71%	0.84%	3.12%	3.12%	3.92%	-0.12%	11.02%	23.48%	6.61%	3.29%
Financials	-0.03%	1.02%	1.27%	1.27%	10.62%	26.23%	19.54%	19.13%	12.23%	1.39%
Health Care	-0.42%	2.30%	0.66%	0.66%	-0.45%	-7.84%	3.22%	7.00%	8.02%	1.79%
Industrials	-0.16%	1.11%	3.99%	3.99%	17.22%	26.32%	21.16%	18.25%	13.08%	1.20%
Materials	-0.75%	1.52%	3.24%	3.24%	9.46%	3.57%	8.83%	10.31%	9.54%	1.86%
Real Estate	-0.10%	2.59%	3.22%	3.22%	6.84%	9.81%	4.06%	7.85%	7.43%	3.25%
Technology	0.67%	0.35%	4.23%	4.23%	12.62%	23.98%	30.04%	23.81%	23.31%	0.55%
Utilities	-0.14%	2.35%	3.21%	3.21%	12.92%	22.01%	10.07%	10.35%	10.74%	2.76%
DJIA	-0.70%	0.51%	1.44%	1.44%	6.05%	14.05%	14.05%	13.21%	12.19%	1.60%
NASDAQ	0.18%	0.83%	3.39%	3.39%	9.44%	22.18%	22.01%	16.06%	15.65%	#N/A
Russell 3000	-0.05%	0.94%	2.63%	2.63%	8.53%	18.33%	18.09%	15.64%	13.15%	1.16%
Russell 1000 Growth	0.32%	0.80%	3.08%	3.08%	9.36%	24.39%	24.19%	17.93%	17.06%	0.49%
Russell 1000 Value	-0.32%	1.19%	2.07%	2.07%	8.20%	13.16%	12.31%	13.43%	9.46%	1.87%
Russell Midcap	-0.44%	1.13%	2.98%	2.98%	7.96%	16.36%	13.42%	12.80%	10.25%	1.50%
Russell 2500	-1.03%	0.38%	3.53%	3.53%	3.99%	9.29%	10.39%	11.55%	8.92%	1.40%
Russell 2000	-1.36%	-0.06%	3.59%	3.59%	1.74%	3.98%	9.16%	10.37%	7.71%	1.32%
MSCI AC World	0.22%	1.64%	2.64%	2.64%	13.24%	19.48%	17.44%	13.71%	10.80%	1.65%
MSCI AC World ex USA	0.49%	2.73%	2.76%	2.76%	21.58%	19.74%	14.92%	10.10%	7.01%	2.53%
MSCI EAFE	0.72%	3.26%	2.29%	2.29%	22.67%	18.59%	16.28%	11.19%	7.14%	2.76%
MSCI Europe	0.51%	2.29%	2.06%	2.06%	26.24%	19.92%	17.76%	12.30%	7.42%	2.85%
MSCI Japan	1.64%	6.70%	2.71%	2.71%	14.99%	12.56%	14.64%	9.02%	6.67%	2.26%
MSCI EM (Emerging Markets)	0.18%	2.14%	3.94%	3.94%	20.12%	20.32%	11.81%	6.59%	6.27%	2.08%
MSCI EM Asia	0.23%	2.38%	4.62%	4.62%	19.51%	21.27%	11.88%	6.40%	7.12%	1.71%
MSCI EM Eastern Europe	1.02%	3.42%	4.52%	4.52%	57.41%	45.24%	35.71%	-11.24%	-2.03%	#N/A
MSCI EM Latin America	-0.14%	-0.47%	-2.85%	-2.85%	26.50%	9.33%	12.06%	8.74%	4.83%	4.14%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.09%	0.35%	-0.60%	-0.60%	3.40%	4.47%	1.73%	-1.08%	1.65%	4.67%
Bloomberg Municipal State GO (10 Y)	-0.01%	0.23%	-0.16%	-0.16%	0.79%	1.28%	1.68%	0.19%	2.33%	3.58%
Barclays US High Yield	0.00%	0.46%	0.49%	0.49%	5.08%	9.08%	8.52%	5.26%	5.52%	7.02%
Bloomberg Global Aggregate USD	-0.09%	0.35%	-0.54%	-0.54%	3.48%	4.61%	1.97%	-0.93%	1.75%	4.70%
Bbg EM Gov't Diversified	0.16%	1.07%	0.41%	0.41%	11.95%	12.02%	8.16%	0.41%	2.07%	6.21%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.39%	1.94%	2.51%	2.51%	4.47%	6.42%	2.97%	7.24%	6.30%	3.82%
Alerian MLP	1.11%	1.44%	0.83%	0.83%	7.95%	13.45%	24.65%	28.77%	5.60%	7.12%
Bloomberg Commodity	0.07%	-0.12%	2.46%	2.46%	8.12%	12.01%	1.04%	12.11%	3.21%	
US Dollar Index	0.00%	-1.27%	0.89%	0.89%	-7.82%	-1.69%	2.16%	3.57%	2.12%	
Interest Rates	7/24/25	7/17/25	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	3.91%	3.91%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.98%	4.01%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.43%	4.47%	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	1.60%	1.56%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.26%	9.01%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.79%	6.77%	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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