



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.30%	0.98%	2.74%	2.74%	9.12%	18.09%	17.25%	16.04%	13.64%	1.16%
Communications Services	-0.34%	0.08%	0.19%	0.19%	11.35%	30.14%	26.32%	15.80%	12.05%	0.71%
Consumer Discretionary	-0.73%	-0.08%	3.62%	3.62%	-0.39%	22.08%	13.28%	10.80%	12.32%	0.60%
Consumer Staples	0.77%	-0.38%	-0.87%	-0.87%	5.48%	8.12%	7.44%	9.47%	8.46%	2.25%
Energy	0.96%	4.01%	4.89%	4.89%	5.70%	0.63%	8.08%	23.76%	6.48%	3.24%
Financials	-0.56%	0.17%	0.75%	0.75%	10.06%	23.65%	18.22%	18.79%	12.12%	1.39%
Health Care	-0.69%	0.62%	-0.32%	-0.32%	-1.42%	-8.85%	2.22%	6.44%	7.71%	1.81%
Industrials	-1.14%	1.11%	3.51%	3.51%	16.68%	22.87%	18.82%	17.86%	12.73%	1.20%
Materials	-0.33%	-1.26%	2.60%	2.60%	8.78%	0.81%	7.18%	10.17%	9.28%	1.88%
Real Estate	1.70%	0.01%	3.15%	3.15%	6.77%	7.89%	2.41%	6.76%	7.33%	3.25%
Technology	-0.21%	2.22%	5.06%	5.06%	13.51%	25.46%	28.34%	23.55%	23.32%	0.54%
Utilities	1.17%	-0.57%	3.58%	3.58%	13.33%	21.79%	7.94%	10.27%	10.55%	2.75%
DJIA	-0.46%	0.29%	1.30%	1.30%	5.91%	11.98%	12.94%	13.12%	12.06%	1.59%
NASDAQ	-0.38%	0.99%	3.59%	3.59%	9.65%	22.22%	20.29%	15.70%	15.61%	#N/A
Russell 3000	-0.34%	0.85%	2.73%	2.73%	8.64%	17.42%	16.57%	15.31%	13.02%	1.16%
Russell 1000 Growth	-0.54%	1.49%	3.43%	3.43%	9.73%	24.79%	22.40%	17.58%	16.97%	0.48%
Russell 1000 Value	-0.10%	0.27%	1.94%	1.94%	8.06%	11.14%	11.06%	13.15%	9.27%	1.88%
Russell Midcap	-0.12%	0.28%	3.03%	3.03%	8.01%	14.19%	11.87%	12.37%	10.12%	1.51%
Russell 2500	-0.44%	-0.11%	3.33%	3.33%	3.78%	6.64%	8.87%	11.03%	8.79%	1.41%
Russell 2000	-0.61%	-0.25%	3.17%	3.17%	1.33%	1.71%	7.51%	9.79%	7.64%	1.34%
MSCI AC World	-0.38%	0.66%	2.04%	2.04%	12.58%	18.51%	16.01%	13.27%	10.66%	1.63%
MSCI AC World ex USA	-0.55%	0.03%	0.78%	0.78%	19.24%	18.21%	13.56%	9.39%	6.81%	2.51%
MSCI EAFE	-0.76%	-0.09%	-0.22%	-0.22%	19.65%	16.66%	14.56%	10.49%	6.87%	2.72%
MSCI Europe	-0.80%	-0.66%	-0.31%	-0.31%	23.32%	17.68%	15.90%	11.49%	7.12%	2.82%
MSCI Japan	-1.03%	1.28%	-1.24%	-1.24%	10.56%	10.58%	12.84%	8.35%	6.41%	2.16%
MSCI EM (Emerging Markets)	-0.25%	0.37%	2.73%	2.73%	18.73%	19.46%	11.25%	5.83%	6.27%	2.07%
MSCI EM Asia	-0.33%	0.52%	3.45%	3.45%	18.17%	20.48%	11.60%	5.63%	7.20%	1.70%
MSCI EM Eastern Europe	-0.33%	-1.35%	1.33%	1.33%	52.62%	41.69%	34.25%	-11.93%	-2.41%	#N/A
MSCI EM Latin America	0.40%	-0.19%	-4.13%	-4.13%	24.84%	9.04%	9.11%	7.71%	4.60%	4.16%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.50%	0.24%	-0.05%	-0.05%	3.97%	4.28%	1.71%	-0.98%	1.71%	4.60%
Bloomberg Municipal State GO (10 Y)	0.13%	0.21%	-0.03%	-0.03%	0.93%	1.36%	1.45%	0.20%	2.33%	3.56%
Barclays US High Yield	0.02%	0.12%	0.55%	0.55%	5.15%	8.97%	8.02%	5.18%	5.51%	7.03%
Bloomberg Global Aggregate USD	0.48%	0.24%	0.00%	0.00%	4.04%	4.43%	1.94%	-0.84%	1.81%	4.63%
Bbg EM Gov't Diversified	-0.41%	-0.73%	-0.72%	-0.72%	10.69%	10.78%	7.04%	0.08%	1.94%	6.32%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	1.42%	-0.77%	2.11%	2.11%	4.06%	4.39%	1.21%	6.10%	6.16%	3.84%
Alerian MLP	1.82%	3.00%	2.31%	2.31%	9.53%	15.34%	22.12%	28.65%	5.60%	6.94%
Bloomberg Commodity	0.66%	-0.74%	2.13%	2.13%	7.77%	13.76%	-0.56%	11.76%	3.20%	
US Dollar Index	1.32%	1.62%	2.53%	2.53%	-6.32%	-0.34%	2.96%	4.11%	2.31%	
Interest Rates	7/29/25	7/22/25	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	3.86%	3.83%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.90%	3.88%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.34%	4.35%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.70%	2.60%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.55%	1.50%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.40%	9.28%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.80%	6.79%	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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