



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.12%	0.07%	2.62%	2.62%	8.98%	18.53%	17.17%	16.09%	13.63%	1.17%
Communications Services	0.15%	-0.05%	0.34%	0.34%	11.51%	30.12%	26.34%	15.76%	12.03%	0.71%
Consumer Discretionary	-0.57%	-1.07%	3.03%	3.03%	-0.96%	22.05%	13.04%	10.65%	12.22%	0.61%
Consumer Staples	-0.93%	-1.24%	-1.79%	-1.79%	4.50%	7.83%	7.10%	9.26%	8.39%	2.27%
Energy	-1.35%	1.06%	3.47%	3.47%	4.27%	-2.22%	7.58%	24.46%	6.40%	3.28%
Financials	-0.19%	-0.73%	0.56%	0.56%	9.84%	21.97%	18.12%	19.18%	12.08%	1.40%
Health Care	-0.17%	-1.55%	-0.48%	-0.48%	-1.58%	-9.10%	2.16%	6.56%	7.71%	1.81%
Industrials	-0.49%	-1.11%	3.00%	3.00%	16.11%	21.94%	18.60%	17.97%	12.69%	1.21%
Materials	-1.99%	-3.33%	0.55%	0.55%	6.61%	-0.85%	6.46%	10.16%	9.01%	1.91%
Real Estate	-1.43%	-1.60%	1.67%	1.67%	5.24%	5.56%	1.92%	6.63%	7.23%	3.29%
Technology	0.43%	1.91%	5.51%	5.51%	14.00%	28.81%	28.48%	23.52%	23.36%	0.54%
Utilities	0.69%	0.91%	4.30%	4.30%	14.11%	21.96%	8.17%	10.43%	10.54%	2.73%
DJIA	-0.38%	-1.22%	0.91%	0.91%	5.50%	10.99%	12.78%	13.22%	12.02%	1.60%
NASDAQ	0.15%	0.52%	3.75%	3.75%	9.82%	23.98%	20.32%	15.64%	15.59%	#N/A
Russell 3000	-0.13%	-0.09%	2.59%	2.59%	8.49%	17.75%	16.50%	15.36%	13.00%	1.16%
Russell 1000 Growth	0.24%	0.91%	3.68%	3.68%	10.00%	26.85%	22.47%	17.56%	16.99%	0.48%
Russell 1000 Value	-0.50%	-0.95%	1.43%	1.43%	7.52%	9.97%	10.85%	13.26%	9.21%	1.89%
Russell Midcap	-0.47%	-0.86%	2.54%	2.54%	7.50%	13.24%	11.68%	12.35%	10.06%	1.52%
Russell 2500	-0.46%	-1.68%	2.86%	2.86%	3.31%	5.84%	8.69%	11.01%	8.72%	1.42%
Russell 2000	-0.47%	-2.22%	2.68%	2.68%	0.85%	0.88%	7.33%	9.77%	7.56%	1.34%
MSCI AC World	-0.15%	-0.52%	1.89%	1.89%	12.41%	18.76%	15.93%	13.38%	10.66%	1.64%
MSCI AC World ex USA	-0.23%	-1.66%	0.55%	0.55%	18.97%	18.06%	13.45%	9.58%	6.81%	2.52%
MSCI EAFE	-0.28%	-2.04%	-0.51%	-0.51%	19.32%	16.29%	14.43%	10.74%	6.85%	2.74%
MSCI Europe	-0.36%	-2.17%	-0.66%	-0.66%	22.87%	16.90%	15.74%	11.86%	7.12%	2.85%
MSCI Japan	0.07%	-2.20%	-1.18%	-1.18%	10.64%	11.15%	12.85%	8.47%	6.37%	2.19%
MSCI EM (Emerging Markets)	0.02%	-0.96%	2.76%	2.76%	18.76%	20.11%	11.24%	5.92%	6.34%	2.08%
MSCI EM Asia	-0.03%	-0.93%	3.41%	3.41%	18.13%	21.16%	11.57%	5.63%	7.23%	1.70%
MSCI EM Eastern Europe	0.57%	-1.50%	1.91%	1.91%	53.49%	44.54%	34.46%	-11.35%	-2.31%	#N/A
MSCI EM Latin America	-0.02%	-1.47%	-4.15%	-4.15%	24.82%	9.59%	9.09%	8.01%	4.76%	4.14%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.25%	0.21%	-0.30%	-0.30%	3.71%	3.89%	1.62%	-1.07%	1.68%	4.65%
Bloomberg Municipal State GO (10 Y)	0.09%	0.21%	0.06%	0.06%	1.02%	1.48%	1.48%	0.19%	2.33%	3.55%
Bardays US High Yield	-0.14%	-0.07%	0.42%	0.42%	5.01%	8.83%	7.96%	5.11%	5.46%	7.09%
Bloomberg Global Aggregate USD	-0.25%	0.21%	-0.25%	-0.25%	3.79%	4.06%	1.85%	-0.93%	1.78%	4.68%
Bbg EM Gov't Diversified	-0.09%	-1.06%	-0.82%	-0.82%	10.58%	10.66%	7.00%	0.10%	2.00%	6.32%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-1.57%	-2.34%	0.51%	0.51%	2.43%	1.89%	0.68%	5.90%	6.04%	3.88%
Alerian MLP	0.14%	2.74%	2.45%	2.45%	9.69%	14.72%	22.15%	29.24%	5.60%	6.93%
Bloomberg Commodity	-0.55%	-0.81%	1.56%	1.56%	7.18%	13.10%	-0.74%	11.88%	3.19%	
US Dollar Index	1.24%	2.81%	3.53%	3.53%	-5.40%	0.60%	3.29%	4.41%	2.34%	
Interest Rates	7/30/25	7/23/25	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	3.94%	3.88%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.96%	3.94%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.38%	4.40%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.70%	2.61%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.55%	1.58%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.32%	9.26%	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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