



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.36%	-0.36%	2.24%	2.24%	8.59%	16.26%	17.01%	15.83%	13.61%	1.17%
Communications Services	2.08%	1.51%	2.43%	2.43%	13.83%	31.14%	27.17%	16.06%	12.25%	0.69%
Consumer Discretionary	-0.38%	-0.22%	2.64%	2.64%	-1.34%	19.46%	12.88%	10.29%	12.15%	0.61%
Consumer Staples	-0.59%	-1.50%	-2.37%	-2.37%	3.88%	7.40%	6.88%	9.16%	8.32%	2.29%
Energy	-0.53%	-0.19%	2.92%	2.92%	3.72%	-3.18%	7.38%	24.47%	6.62%	3.30%
Financials	-0.60%	-1.30%	-0.05%	-0.05%	9.18%	21.44%	17.86%	19.03%	12.07%	1.39%
Health Care	-2.79%	-3.90%	-3.26%	-3.26%	-4.33%	-11.28%	1.21%	6.07%	7.35%	1.86%
Industrials	0.00%	-0.94%	3.01%	3.01%	16.11%	20.59%	18.57%	18.07%	12.69%	1.21%
Materials	-0.99%	-3.56%	-0.44%	-0.44%	5.55%	-2.84%	6.10%	9.91%	8.93%	1.93%
Real Estate	-1.74%	-3.21%	-0.09%	-0.09%	3.42%	4.03%	1.33%	6.29%	6.98%	3.35%
Technology	-0.30%	0.92%	5.19%	5.19%	13.66%	23.55%	28.31%	22.84%	23.38%	0.54%
Utilities	0.61%	1.68%	4.94%	4.94%	14.81%	21.18%	8.38%	10.51%	10.50%	2.72%
DJIA	-0.74%	-1.26%	0.16%	0.16%	4.72%	9.91%	12.48%	12.95%	11.98%	1.60%
NASDAQ	-0.03%	0.31%	3.72%	3.72%	9.79%	20.77%	20.29%	15.29%	15.59%	#N/A
Russell 3000	-0.38%	-0.42%	2.20%	2.20%	8.08%	15.62%	16.33%	15.14%	12.97%	1.17%
Russell 1000 Growth	0.09%	0.68%	3.78%	3.78%	10.10%	23.65%	22.47%	17.22%	16.99%	0.48%
Russell 1000 Value	-0.84%	-1.47%	0.57%	0.57%	6.61%	8.76%	10.53%	13.14%	9.17%	1.90%
Russell Midcap	-0.67%	-1.09%	1.86%	1.86%	6.78%	12.01%	11.42%	12.20%	9.97%	1.53%
Russell 2500	-0.90%	-1.55%	1.93%	1.93%	2.38%	4.27%	8.36%	10.97%	8.58%	1.43%
Russell 2000	-0.92%	-1.79%	1.73%	1.73%	-0.08%	-0.55%	6.99%	9.78%	7.41%	1.35%
MSCI AC World	-0.50%	-1.23%	1.38%	1.38%	11.85%	16.33%	15.71%	13.26%	10.56%	1.64%
MSCI AC World ex USA	-0.81%	-2.93%	-0.26%	-0.26%	18.01%	15.30%	13.13%	9.62%	6.61%	2.52%
MSCI EAFE	-0.89%	-3.61%	-1.39%	-1.39%	18.25%	13.29%	14.08%	10.85%	6.64%	2.77%
MSCI Europe	-1.11%	-3.74%	-1.77%	-1.77%	21.51%	14.49%	15.29%	11.78%	6.88%	2.88%
MSCI Japan	-0.23%	-4.00%	-1.40%	-1.40%	10.39%	6.49%	12.75%	9.16%	6.23%	2.21%
MSCI EM (Emerging Markets)	-0.72%	-1.85%	2.02%	2.02%	17.90%	17.80%	10.96%	5.83%	6.17%	2.08%
MSCI EM Asia	-0.84%	-1.98%	2.55%	2.55%	17.15%	18.70%	11.24%	5.48%	7.09%	1.70%
MSCI EM Eastern Europe	-1.00%	-3.46%	0.90%	0.90%	51.96%	40.85%	33.96%	-11.56%	-2.50%	#N/A
MSCI EM Latin America	-0.29%	-1.61%	-4.42%	-4.42%	24.46%	7.77%	8.98%	8.31%	4.53%	4.14%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.04%	0.34%	-0.26%	-0.26%	3.75%	3.37%	1.63%	-1.07%	1.65%	4.64%
Bloomberg Municipal State GO (10 Y)	0.05%	0.27%	0.11%	0.11%	1.06%	1.52%	1.49%	0.18%	2.26%	3.55%
Bardays US High Yield	0.03%	-0.04%	0.45%	0.45%	5.04%	8.63%	7.96%	5.08%	5.47%	7.08%
Bloomberg Global Aggregate USD	0.04%	0.34%	-0.21%	-0.21%	3.83%	3.55%	1.86%	-0.93%	1.76%	4.67%
Bbg EM Gov't Diversified	-0.27%	-1.49%	-1.09%	-1.09%	10.28%	9.78%	6.89%	0.04%	1.95%	6.31%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-1.46%	-3.39%	-0.96%	-0.96%	0.93%	0.91%	0.19%	5.64%	5.82%	3.95%
Alerian MLP	0.69%	2.31%	3.17%	3.17%	10.45%	15.95%	22.40%	29.59%	6.28%	6.92%
Bloomberg Commodity	-1.98%	-2.84%	-0.45%	-0.45%	5.05%	9.68%	-1.40%	11.30%	3.08%	
US Dollar Index	1.12%	2.77%	3.68%	3.68%	-5.27%	1.16%	3.34%	4.37%	2.39%	
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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