



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	1.48%	-0.92%	-0.14%	2.10%	8.43%	19.90%	16.80%	15.55%	13.65%	1.17%
Communications Services	2.59%	2.79%	0.90%	3.35%	14.86%	33.71%	26.77%	16.19%	12.37%	0.69%
Consumer Discretionary	0.68%	-4.56%	-2.93%	-0.37%	-4.23%	24.35%	10.76%	9.58%	11.81%	0.63%
Consumer Staples	0.42%	0.20%	0.97%	-1.42%	4.89%	6.35%	7.15%	9.13%	8.39%	2.26%
Energy	-0.44%	-3.08%	-2.16%	0.69%	1.47%	-0.60%	9.88%	23.25%	6.65%	3.38%
Financials	0.90%	-2.21%	-0.87%	-0.92%	8.23%	25.08%	17.88%	18.87%	11.98%	1.42%
Health Care	1.41%	-1.69%	2.00%	-1.33%	-2.42%	-10.27%	2.11%	6.37%	7.57%	1.83%
Industrials	0.91%	-2.17%	-0.56%	2.43%	15.46%	24.86%	18.27%	17.78%	12.69%	1.22%
Materials	1.43%	-2.65%	0.66%	0.22%	6.25%	0.02%	6.94%	9.91%	9.04%	1.92%
Real Estate	0.81%	-0.93%	0.57%	0.48%	4.01%	2.89%	2.09%	6.44%	7.03%	3.30%
Technology	2.15%	-0.05%	0.04%	5.23%	13.70%	30.47%	27.48%	22.19%	23.53%	0.54%
Utilities	1.74%	4.42%	1.88%	6.91%	16.97%	20.99%	8.82%	10.94%	10.83%	2.66%
DJIA	1.34%	-1.48%	0.10%	0.26%	4.82%	13.06%	12.68%	12.64%	12.08%	1.63%
NASDAQ	1.95%	-0.58%	-0.32%	3.38%	9.43%	26.26%	19.16%	14.80%	15.60%	#N/A
Russell 3000	1.54%	-0.98%	-0.13%	2.07%	7.94%	19.63%	16.03%	14.82%	13.01%	1.17%
Russell 1000 Growth	1.96%	-0.23%	-0.02%	3.76%	10.08%	28.65%	21.80%	16.86%	17.03%	0.48%
Russell 1000 Value	1.02%	-1.71%	-0.28%	0.30%	6.32%	11.46%	10.61%	12.90%	9.21%	1.91%
Russell Midcap	1.47%	-1.18%	0.08%	1.94%	6.87%	16.08%	11.39%	11.96%	10.04%	1.53%
Russell 2500	1.65%	-1.84%	-0.06%	1.88%	2.32%	10.05%	8.17%	10.53%	8.64%	1.42%
Russell 2000	2.11%	-1.95%	0.04%	1.78%	-0.04%	6.31%	6.62%	9.25%	7.50%	1.36%
MSCI AC World	1.21%	-1.14%	-0.12%	1.26%	11.72%	20.14%	15.51%	12.94%	10.60%	1.67%
MSCI AC World ex USA	0.64%	-1.63%	-0.06%	-0.32%	17.94%	19.21%	13.09%	9.26%	6.64%	2.56%
MSCI EAFE	0.57%	-1.73%	0.20%	-1.20%	18.48%	17.94%	14.09%	10.47%	6.68%	2.80%
MSCI Europe	1.03%	-2.18%	0.08%	-1.69%	21.61%	18.07%	15.23%	11.49%	6.91%	2.92%
MSCI Japan	-0.73%	-0.31%	0.88%	-0.53%	11.36%	15.34%	13.14%	8.58%	6.34%	2.22%
MSCI EM (Emerging Markets)	0.91%	-1.40%	-0.46%	1.54%	17.35%	19.82%	10.77%	5.52%	6.22%	2.12%
MSCI EM Asia	0.95%	-1.87%	-0.69%	1.84%	16.34%	20.44%	10.98%	4.99%	7.09%	1.74%
MSCI EM Eastern Europe	0.88%	-0.72%	0.04%	0.94%	52.03%	44.30%	34.36%	-11.80%	-2.27%	#N/A
MSCI EM Latin America	0.84%	0.63%	0.53%	-3.91%	25.12%	12.05%	9.29%	9.11%	4.78%	4.20%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.13%	1.22%	0.94%	0.68%	4.72%	2.73%	1.94%	-0.91%	1.76%	4.47%
Bloomberg Municipal State GO (10 Y)	0.19%	0.76%	0.49%	0.60%	1.56%	1.08%	1.56%	0.25%	2.26%	3.48%
Bardays US High Yield	0.26%	0.04%	0.12%	0.58%	5.17%	9.10%	7.72%	5.06%	5.49%	7.02%
Bloomberg Global Aggregate USD	0.13%	1.19%	0.91%	0.71%	4.78%	2.93%	2.16%	-0.78%	1.86%	4.50%
Bbg EM Gov't Diversified	0.74%	0.02%	0.80%	-0.30%	11.16%	9.92%	6.99%	0.30%	2.09%	6.27%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.92%	-0.88%	0.76%	-0.21%	1.70%	0.39%	1.10%	5.77%	5.90%	3.91%
Alerian MLP	0.79%	1.77%	-0.88%	2.26%	9.48%	17.87%	23.41%	28.57%	6.28%	6.99%
Bloomberg Commodity	-0.16%	-2.57%	-0.70%	-1.15%	4.31%	10.84%	-0.61%	10.55%	3.08%	
US Dollar Index	-0.33%	0.25%	-1.11%	2.53%	-6.32%	0.84%	3.02%	4.12%	2.21%	
Interest Rates	8/4/25	7/28/25	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	3.69%	3.91%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.75%	3.96%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.22%	4.42%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.63%	2.68%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.50%	1.56%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.13%	9.40%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.78%	6.80%	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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