



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.08%	0.02%	0.02%	2.27%	8.61%	23.46%	16.87%	15.27%	13.75%	1.17%
Communications Services	-0.34%	0.39%	0.39%	2.82%	14.27%	36.48%	26.85%	15.47%	12.43%	0.69%
Consumer Discretionary	0.11%	-0.10%	-0.10%	2.54%	-1.43%	32.53%	12.41%	9.85%	12.41%	0.61%
Consumer Staples	0.73%	3.31%	3.31%	0.86%	7.32%	10.29%	8.00%	9.56%	8.69%	2.20%
Energy	-0.39%	-3.30%	-3.30%	-0.48%	0.29%	-0.62%	8.70%	22.86%	6.64%	3.43%
Financials	-1.13%	-1.91%	-1.91%	-1.96%	7.09%	25.52%	17.11%	17.80%	11.86%	1.44%
Health Care	-1.16%	-1.10%	-1.10%	-4.32%	-5.38%	-10.06%	1.07%	5.66%	7.41%	1.89%
Industrials	-0.12%	-0.83%	-0.83%	2.15%	15.15%	25.88%	18.02%	16.78%	12.71%	1.22%
Materials	0.39%	1.06%	1.06%	0.62%	6.68%	3.63%	6.93%	9.67%	9.22%	1.91%
Real Estate	0.40%	0.45%	0.45%	0.35%	3.88%	4.32%	1.93%	6.24%	6.95%	3.31%
Technology	0.41%	0.88%	0.88%	6.11%	14.65%	37.07%	27.84%	22.32%	23.61%	0.54%
Utilities	1.06%	0.96%	0.96%	5.95%	15.92%	21.52%	8.58%	10.49%	10.50%	2.69%
DJIA	-0.51%	-0.37%	-0.37%	-0.21%	4.33%	15.35%	12.39%	12.02%	12.12%	1.62%
NASDAQ	0.35%	0.57%	0.57%	4.31%	10.42%	31.93%	19.65%	14.85%	15.84%	--
Russell 3000	-0.08%	0.01%	0.01%	2.22%	8.09%	23.18%	16.05%	14.55%	13.12%	1.17%
Russell 1000 Growth	-0.13%	0.37%	0.37%	4.16%	10.50%	33.56%	22.01%	16.81%	17.19%	0.48%
Russell 1000 Value	-0.01%	-0.39%	-0.39%	0.18%	6.20%	13.68%	10.47%	12.44%	9.24%	1.91%
Russell Midcap	-0.15%	-0.60%	-0.60%	1.25%	6.14%	17.85%	10.94%	11.61%	10.02%	1.54%
Russell 2500	-0.21%	-0.30%	-0.30%	1.63%	2.08%	13.22%	7.82%	9.98%	8.74%	1.43%
Russell 2000	-0.29%	0.16%	0.16%	1.90%	0.08%	10.28%	6.36%	8.54%	7.70%	1.36%
MSCI AC World	0.25%	0.65%	0.65%	2.04%	12.58%	23.63%	15.84%	12.94%	10.75%	1.64%
MSCI AC World ex USA	0.82%	1.81%	1.81%	1.55%	20.15%	22.51%	13.89%	9.64%	6.90%	2.54%
MSCI EAFE	0.80%	1.91%	1.91%	0.49%	20.51%	21.02%	15.04%	10.84%	6.90%	2.78%
MSCI Europe	0.96%	1.61%	1.61%	-0.18%	23.47%	20.17%	16.22%	11.77%	7.13%	2.91%
MSCI Japan	0.66%	3.21%	3.21%	1.77%	13.93%	20.69%	14.26%	9.18%	6.49%	2.16%
MSCI EM (Emerging Markets)	1.30%	1.45%	1.45%	3.49%	19.61%	23.32%	11.13%	5.92%	6.52%	2.09%
MSCI EM Asia	1.40%	1.09%	1.09%	3.67%	18.42%	23.93%	11.28%	5.37%	7.34%	1.72%
MSCI EM Eastern Europe	2.28%	4.30%	4.30%	5.24%	58.50%	55.74%	36.59%	-11.28%	-1.73%	--
MSCI EM Latin America	1.55%	3.72%	3.72%	-0.87%	29.09%	12.93%	9.99%	9.74%	5.36%	4.11%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.08%	0.85%	0.85%	0.58%	4.63%	3.60%	2.27%	-0.92%	1.73%	4.49%
Bloomberg Municipal State GO (10 Y)	0.03%	0.63%	0.63%	0.74%	1.71%	1.28%	1.68%	0.23%	2.26%	3.46%
Bardays US High Yield	0.03%	0.27%	0.27%	0.73%	5.33%	9.18%	7.83%	5.02%	5.58%	6.98%
Bloomberg Global Aggregate USD	-0.07%	0.83%	0.83%	0.62%	4.69%	3.78%	2.48%	-0.80%	1.84%	4.52%
Bbg EM Gov't Diversified	0.35%	1.41%	1.41%	0.31%	11.84%	10.47%	7.10%	0.44%	2.24%	6.24%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.40%	0.71%	0.71%	-0.26%	1.65%	1.83%	1.01%	5.53%	5.91%	3.90%
Alerian MLP	-0.79%	-2.81%	-2.81%	0.27%	7.35%	17.62%	22.34%	27.37%	6.28%	7.14%
Bloomberg Commodity	0.30%	-0.36%	-0.36%	-0.81%	4.67%	11.09%	-0.44%	10.65%	3.19%	
US Dollar Index	-0.33%	-1.44%	-1.44%	2.19%	-6.63%	0.44%	2.62%	4.05%	2.22%	
Interest Rates	8/7/25	7/31/25	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	3.72%	3.94%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.79%	3.96%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.23%	4.37%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.63%	2.70%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.49%	1.56%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.10%	9.30%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.74%	6.78%	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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