



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.33%	1.94%	2.04%	4.33%	10.81%	20.49%	16.41%	15.57%	13.94%	1.15%
Communications Services	-0.49%	2.09%	2.83%	5.33%	17.05%	34.07%	26.05%	16.06%	12.62%	0.68%
Consumer Discretionary	1.29%	2.63%	2.42%	5.12%	1.05%	29.84%	12.15%	10.04%	12.69%	0.60%
Consumer Staples	-0.40%	1.02%	3.61%	1.16%	7.63%	9.49%	7.67%	9.42%	8.75%	2.22%
Energy	1.20%	1.15%	-1.81%	1.06%	1.84%	-0.94%	6.69%	22.79%	6.42%	3.36%
Financials	0.56%	1.56%	0.75%	0.71%	10.01%	25.89%	16.10%	18.19%	12.20%	1.40%
Health Care	1.58%	2.13%	2.20%	-1.14%	-2.23%	-10.28%	1.62%	6.23%	7.78%	1.84%
Industrials	0.39%	1.07%	0.35%	3.37%	16.52%	23.78%	17.04%	16.42%	12.77%	1.21%
Materials	1.69%	3.58%	4.28%	3.81%	10.07%	4.72%	6.25%	10.04%	9.49%	1.86%
Real Estate	0.63%	-0.17%	-0.13%	-0.22%	3.28%	2.21%	0.39%	6.53%	6.77%	3.28%
Technology	-0.19%	2.33%	2.80%	8.13%	16.84%	29.23%	27.65%	22.74%	23.83%	0.53%
Utilities	0.22%	1.00%	0.90%	5.88%	15.85%	19.98%	7.39%	10.70%	10.29%	2.71%
DJIA	1.04%	1.69%	1.83%	2.00%	6.63%	14.88%	12.12%	12.12%	12.33%	1.61%
NASDAQ	0.14%	2.59%	2.82%	6.64%	12.88%	27.09%	19.35%	15.29%	16.12%	--
Russell 3000	0.46%	2.07%	2.17%	4.42%	10.42%	20.49%	15.57%	14.88%	13.33%	1.15%
Russell 1000 Growth	-0.10%	1.60%	2.10%	5.95%	12.41%	27.50%	21.58%	17.08%	17.37%	0.48%
Russell 1000 Value	0.94%	2.35%	1.96%	2.54%	8.70%	13.69%	9.93%	12.78%	9.44%	1.87%
Russell Midcap	1.39%	2.16%	1.70%	3.59%	8.60%	16.93%	10.29%	11.98%	10.22%	1.50%
Russell 2500	1.85%	4.02%	3.93%	5.94%	6.41%	14.40%	7.74%	10.74%	9.17%	1.38%
Russell 2000	1.99%	4.84%	5.32%	7.14%	5.23%	12.59%	6.43%	9.48%	8.25%	1.30%
MSCI AC World	0.63%	2.17%	2.58%	3.99%	14.73%	21.52%	15.49%	13.06%	11.01%	1.62%
MSCI AC World ex USA	1.23%	2.73%	3.74%	3.47%	22.42%	22.33%	13.82%	9.55%	7.24%	2.52%
MSCI EAFE	1.18%	3.11%	4.25%	2.80%	23.28%	21.53%	15.11%	10.66%	7.26%	2.74%
MSCI Europe	1.12%	2.76%	3.43%	1.60%	25.68%	20.61%	16.17%	11.49%	7.41%	2.86%
MSCI Japan	1.63%	5.02%	7.67%	6.16%	18.85%	22.32%	14.91%	9.27%	7.04%	2.12%
MSCI EM (Emerging Markets)	1.60%	2.71%	2.86%	4.93%	21.27%	22.52%	11.05%	6.07%	6.90%	2.07%
MSCI EM Asia	1.88%	2.84%	2.52%	5.14%	20.10%	23.39%	11.58%	5.58%	7.75%	1.70%
MSCI EM Eastern Europe	1.04%	4.57%	6.64%	7.60%	62.06%	53.20%	35.20%	-11.70%	-1.54%	--
MSCI EM Latin America	-0.05%	3.24%	5.45%	0.79%	31.24%	9.47%	7.83%	10.14%	5.79%	3.99%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.37%	0.12%	1.04%	0.78%	4.83%	3.09%	2.25%	-0.72%	1.76%	4.47%
Bloomberg Municipal State GO (10 Y)	0.07%	0.12%	0.73%	0.84%	1.80%	1.40%	1.73%	0.32%	2.26%	3.45%
Barclays US High Yield	0.21%	0.33%	0.58%	1.04%	5.65%	9.11%	7.61%	5.13%	5.67%	6.90%
Bloomberg Global Aggregate USD	0.37%	0.13%	1.04%	0.83%	4.90%	3.30%	2.47%	-0.60%	1.87%	4.49%
Bbg EM Gov't Diversified	0.47%	0.97%	2.04%	0.93%	12.53%	9.88%	6.72%	0.56%	2.32%	6.25%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.86%	0.45%	0.77%	-0.20%	1.71%	0.55%	-0.40%	5.90%	5.82%	3.88%
Alerian MLP	1.07%	0.64%	-1.41%	1.71%	8.89%	21.48%	20.79%	27.08%	6.28%	7.19%
Bloomberg Commodity	0.12%	-0.02%	-0.67%	-1.12%	4.35%	9.79%	-2.02%	10.46%	3.16%	
US Dollar Index	-0.69%	-0.26%	-1.94%	1.67%	-7.10%	0.46%	2.75%	3.96%	2.29%	
Interest Rates	8/13/25	8/6/25	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	3.67%	3.69%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.77%	3.77%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.24%	4.22%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.68%	2.63%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.52%	1.49%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.05%	9.10%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.70%	6.76%	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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