



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.03%	2.06%	2.08%	4.37%	10.84%	20.07%	16.40%	15.58%	13.90%	1.15%
Communications Services	0.42%	2.86%	3.26%	5.77%	17.54%	35.86%	26.19%	16.18%	12.64%	0.67%
Consumer Discretionary	0.46%	2.99%	2.89%	5.61%	1.52%	30.97%	12.31%	10.16%	12.73%	0.60%
Consumer Staples	-0.73%	-0.44%	2.85%	0.41%	6.84%	8.17%	7.40%	9.26%	8.64%	2.23%
Energy	-0.13%	1.41%	-1.94%	0.93%	1.71%	-1.72%	6.63%	22.53%	6.42%	3.36%
Financials	0.55%	3.28%	1.31%	1.26%	10.61%	24.97%	16.29%	18.25%	12.18%	1.39%
Health Care	0.50%	3.85%	2.71%	-0.64%	-1.74%	-10.23%	1.79%	6.38%	7.80%	1.83%
Industrials	-0.88%	0.30%	-0.53%	2.46%	15.50%	22.18%	16.67%	16.12%	12.60%	1.22%
Materials	-0.80%	2.35%	3.44%	2.98%	9.19%	3.88%	5.96%	9.83%	9.35%	1.88%
Real Estate	-0.72%	-1.29%	-0.85%	-0.94%	2.53%	1.09%	0.14%	6.34%	6.63%	3.31%
Technology	-0.03%	1.87%	2.77%	8.10%	16.80%	28.41%	27.59%	22.75%	23.76%	0.53%
Utilities	-0.69%	-0.75%	0.20%	5.15%	15.05%	19.21%	7.14%	10.73%	10.13%	2.73%
DJIA	-0.02%	2.18%	1.80%	1.97%	6.61%	14.16%	12.09%	12.09%	12.29%	1.61%
NASDAQ	-0.01%	2.22%	2.81%	6.63%	12.87%	27.04%	19.32%	15.34%	16.08%	--
Russell 3000	-0.12%	2.04%	2.05%	4.30%	10.30%	19.95%	15.50%	14.86%	13.27%	1.15%
Russell 1000 Growth	0.12%	1.84%	2.22%	6.08%	12.54%	27.23%	21.60%	17.14%	17.34%	0.48%
Russell 1000 Value	-0.26%	2.09%	1.69%	2.27%	8.41%	12.91%	9.82%	12.70%	9.36%	1.87%
Russell Midcap	-0.88%	1.41%	0.80%	2.67%	7.64%	15.71%	9.95%	11.78%	10.06%	1.52%
Russell 2500	-1.21%	2.98%	2.67%	4.66%	5.12%	13.27%	7.30%	10.49%	8.97%	1.39%
Russell 2000	-1.24%	3.84%	4.01%	5.81%	3.93%	11.77%	5.98%	9.23%	8.05%	1.31%
MSCI AC World	-0.11%	1.80%	2.47%	3.88%	14.61%	20.69%	15.43%	13.09%	10.98%	1.63%
MSCI AC World ex USA	-0.30%	1.59%	3.43%	3.16%	22.06%	20.81%	13.68%	9.61%	7.22%	2.52%
MSCI EAFE	-0.23%	2.05%	4.01%	2.56%	22.99%	19.88%	15.00%	10.76%	7.26%	2.71%
MSCI Europe	0.16%	1.95%	3.60%	1.77%	25.88%	19.36%	16.21%	11.81%	7.46%	2.88%
MSCI Japan	-1.44%	2.82%	6.12%	4.63%	17.14%	19.08%	14.34%	8.87%	6.90%	2.06%
MSCI EM (Emerging Markets)	-0.38%	1.00%	2.47%	4.53%	20.81%	21.42%	10.89%	6.05%	6.87%	2.07%
MSCI EM Asia	-0.33%	1.08%	2.19%	4.79%	19.71%	22.50%	11.45%	5.59%	7.71%	1.72%
MSCI EM Eastern Europe	-1.88%	0.32%	4.63%	5.57%	59.01%	48.61%	34.30%	-11.99%	-1.76%	--
MSCI EM Latin America	-0.87%	0.78%	4.53%	-0.09%	30.10%	7.04%	7.51%	9.79%	5.70%	3.92%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.27%	-0.08%	0.77%	0.50%	4.54%	2.63%	2.16%	-0.76%	1.74%	4.51%
Bloomberg Municipal State GO (10 Y)	0.02%	0.11%	0.75%	0.86%	1.82%	1.30%	1.74%	0.35%	2.26%	3.45%
Bardays US High Yield	-0.07%	0.24%	0.52%	0.97%	5.58%	8.76%	7.58%	5.17%	5.67%	6.95%
Bloomberg Global Aggregate USD	-0.26%	-0.06%	0.78%	0.57%	4.63%	2.85%	2.37%	-0.63%	1.85%	4.54%
Bbg EM Gov't Diversified	-0.17%	0.45%	1.86%	0.76%	12.34%	8.84%	6.65%	0.54%	2.31%	6.24%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.79%	-0.73%	-0.02%	-0.99%	0.91%	-0.58%	-0.66%	5.71%	5.67%	3.91%
Alerian MLP	-0.21%	1.23%	-1.61%	1.50%	8.67%	18.91%	20.68%	27.06%	6.28%	7.20%
Bloomberg Commodity	-0.33%	-0.64%	-1.00%	-1.45%	4.00%	9.57%	-2.12%	10.40%	3.14%	
US Dollar Index	0.18%	-0.07%	-1.51%	2.12%	-6.70%	0.90%	2.89%	4.11%	2.33%	
Interest Rates	8/14/25	8/7/25	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	3.74%	3.72%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.82%	3.79%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.29%	4.23%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.70%	2.63%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.55%	1.49%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.99%	9.05%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.69%	6.74%	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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