



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.27%	1.55%	0.86%	5.22%	11.74%	20.53%	18.69%	15.56%	14.82%	1.14%
Communications Services	1.64%	6.95%	6.51%	13.00%	25.58%	50.26%	32.48%	17.18%	13.85%	0.63%
Consumer Discretionary	0.09%	3.25%	2.31%	8.58%	4.38%	29.16%	14.73%	10.07%	13.57%	0.58%
Consumer Staples	0.39%	0.58%	0.66%	-0.15%	6.24%	2.20%	7.87%	8.79%	9.37%	2.24%
Energy	0.54%	-3.33%	-3.10%	3.36%	4.16%	3.94%	6.45%	26.20%	7.62%	3.31%
Financials	0.47%	-0.50%	-1.20%	1.84%	11.24%	20.54%	17.91%	18.65%	13.33%	1.38%
Health Care	0.60%	0.78%	0.85%	2.81%	1.67%	-9.03%	3.78%	7.31%	9.05%	1.77%
Industrials	-0.65%	-0.22%	-1.14%	1.84%	14.80%	19.25%	18.31%	15.97%	13.21%	1.23%
Materials	-1.57%	-0.99%	-1.56%	3.66%	9.90%	2.63%	7.57%	9.22%	10.15%	1.91%
Real Estate	-0.02%	0.73%	-1.00%	1.06%	4.61%	-1.87%	2.73%	6.55%	7.93%	3.25%
Technology	0.01%	1.87%	0.88%	6.48%	15.05%	31.00%	31.03%	21.83%	24.36%	0.53%
Utilities	0.75%	-0.97%	-1.34%	1.90%	11.49%	11.68%	5.74%	10.24%	10.87%	2.82%
DJIA	0.43%	0.95%	0.43%	4.03%	8.77%	13.84%	14.59%	12.47%	13.30%	1.57%
NASDAQ	0.37%	2.84%	2.00%	7.54%	13.83%	30.33%	22.67%	15.26%	17.17%	0.57%
Russell 3000	0.19%	1.57%	0.92%	5.53%	11.59%	20.80%	17.97%	15.00%	14.19%	1.13%
Russell 1000 Growth	0.32%	2.56%	1.74%	6.76%	13.26%	30.07%	24.49%	16.79%	18.15%	0.47%
Russell 1000 Value	0.12%	0.53%	0.06%	3.84%	10.08%	11.66%	11.73%	13.19%	10.41%	1.84%
Russell Midcap	-0.38%	0.78%	0.13%	4.54%	9.60%	15.95%	12.26%	12.49%	10.98%	1.49%
Russell 2500	-0.69%	1.16%	0.61%	7.94%	8.42%	15.90%	10.37%	11.77%	9.97%	1.35%
Russell 2000	-0.54%	1.28%	0.68%	9.75%	7.79%	15.04%	9.72%	10.74%	9.03%	1.25%
MSCI AC World	0.30%	1.79%	1.11%	5.09%	15.94%	21.31%	17.95%	13.26%	11.85%	1.61%
MSCI AC World ex USA	0.30%	2.13%	1.45%	4.77%	23.96%	21.38%	16.44%	10.02%	8.04%	2.49%
MSCI EAFE	-0.05%	2.08%	0.76%	3.60%	24.24%	18.90%	17.87%	11.03%	8.02%	2.72%
MSCI Europe	-0.03%	2.31%	0.73%	2.37%	26.62%	18.33%	19.00%	11.86%	8.13%	2.86%
MSCI Japan	-0.15%	1.95%	1.17%	6.69%	19.44%	19.00%	17.80%	9.55%	7.85%	2.05%
MSCI EM (Emerging Markets)	1.05%	2.41%	2.98%	6.60%	23.20%	25.15%	13.34%	6.59%	7.75%	2.05%
MSCI EM Asia	1.27%	2.71%	3.50%	7.16%	22.41%	26.55%	13.95%	6.14%	8.57%	1.69%
MSCI EM Eastern Europe	-0.94%	2.47%	2.02%	2.79%	54.82%	44.78%	39.70%	-10.57%	-1.59%	--
MSCI EM Latin America	0.19%	1.83%	1.61%	5.18%	36.96%	17.65%	10.02%	11.03%	7.05%	3.75%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.21%	1.34%	1.10%	2.04%	6.14%	2.78%	3.70%	-0.45%	1.88%	4.31%
Bloomberg Municipal State GO (10 Y)	0.13%	1.31%	1.31%	2.33%	3.30%	2.34%	3.15%	0.77%	2.32%	3.24%
Barclays US High Yield	-0.11%	0.56%	0.31%	2.02%	6.68%	8.17%	8.98%	5.26%	5.74%	6.71%
Bloomberg Global Aggregate USD	-0.20%	1.31%	1.07%	2.07%	6.20%	2.97%	3.88%	-0.34%	1.98%	4.34%
Bbg EM Gov't Diversified	0.11%	1.03%	0.64%	1.47%	13.14%	9.29%	8.07%	0.63%	2.82%	6.26%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.60%	-0.43%	-0.43%	1.99%	3.94%	-1.40%	2.62%	6.46%	6.85%	3.75%
Alerian MLP	-0.54%	-2.55%	-2.55%	-0.04%	7.01%	14.56%	19.73%	30.01%	6.76%	7.34%
Bloomberg Commodity	0.73%	0.45%	0.45%	1.92%	7.56%	14.95%	0.85%	10.96%	3.60%	
US Dollar Index	-0.29%	-0.15%	-0.15%	1.67%	-7.10%	1.38%	1.39%	3.95%	2.35%	
Interest Rates	9/9/25	9/2/25	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	3.54%	3.66%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.61%	3.74%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.08%	4.28%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.66%	2.78%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.56%	1.61%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.78%	8.92%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.54%	#N/A	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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