



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.30%	1.33%	1.17%	5.53%	12.08%	20.36%	18.79%	16.03%	14.79%	1.13%
Communications Services	-0.87%	2.17%	5.58%	12.02%	24.49%	48.81%	32.05%	17.34%	13.75%	0.64%
Consumer Discretionary	-1.58%	1.19%	0.70%	6.87%	2.73%	25.39%	14.11%	10.12%	13.36%	0.59%
Consumer Staples	-1.06%	-0.50%	-0.40%	-1.21%	5.12%	1.12%	7.48%	8.83%	9.23%	2.27%
Energy	1.78%	0.67%	-1.38%	5.19%	6.01%	7.84%	7.06%	27.57%	7.75%	3.25%
Financials	-0.33%	-0.67%	-1.52%	1.51%	10.88%	21.32%	17.76%	18.91%	13.24%	1.38%
Health Care	-0.90%	0.28%	-0.06%	1.88%	0.75%	-10.25%	3.46%	7.45%	8.85%	1.78%
Industrials	0.73%	0.99%	-0.42%	2.58%	15.63%	19.91%	18.57%	16.44%	13.28%	1.22%
Materials	0.23%	-0.24%	-1.33%	3.90%	10.16%	2.80%	7.64%	9.48%	10.15%	1.91%
Real Estate	-0.07%	0.87%	-1.07%	0.99%	4.54%	-3.64%	2.71%	6.85%	7.90%	3.25%
Technology	1.76%	2.81%	2.66%	8.35%	17.07%	31.67%	31.74%	22.82%	24.44%	0.52%
Utilities	1.71%	0.92%	0.35%	3.64%	13.39%	13.07%	6.32%	11.01%	11.08%	2.78%
DJIA	-0.47%	0.53%	-0.04%	3.55%	8.26%	13.54%	14.40%	12.70%	13.19%	1.56%
NASDAQ	0.03%	1.83%	2.03%	7.57%	13.87%	29.29%	22.65%	15.73%	17.08%	0.56%
Russell 3000	0.24%	1.38%	1.16%	5.78%	11.86%	20.61%	18.04%	15.43%	14.16%	1.13%
Russell 1000 Growth	0.70%	2.30%	2.45%	7.50%	14.05%	29.74%	24.74%	17.41%	18.16%	0.47%
Russell 1000 Value	-0.22%	0.40%	-0.16%	3.61%	9.83%	11.59%	11.63%	13.45%	10.35%	1.85%
Russell Midcap	-0.08%	0.88%	0.06%	4.46%	9.51%	15.90%	12.21%	12.77%	10.94%	1.50%
Russell 2500	-0.09%	1.23%	0.52%	7.84%	8.32%	15.95%	10.32%	12.03%	9.93%	1.35%
Russell 2000	-0.16%	1.22%	0.53%	9.58%	7.62%	14.87%	9.65%	10.98%	8.96%	1.26%
MSCI AC World	0.33%	1.77%	1.45%	5.43%	16.32%	21.54%	18.05%	13.55%	11.91%	1.60%
MSCI AC World ex USA	0.42%	2.45%	1.88%	5.21%	24.48%	22.40%	16.58%	10.09%	8.20%	2.48%
MSCI EAFE	0.19%	2.23%	0.94%	3.79%	24.47%	19.81%	17.92%	11.01%	8.16%	2.70%
MSCI Europe	-0.07%	1.54%	0.66%	2.29%	26.53%	19.20%	18.94%	11.86%	8.21%	2.86%
MSCI Japan	0.49%	3.85%	1.66%	7.21%	20.02%	19.89%	17.96%	9.38%	8.11%	2.03%
MSCI EM (Emerging Markets)	0.97%	3.27%	3.98%	7.64%	24.40%	26.41%	13.69%	6.80%	7.92%	2.03%
MSCI EM Asia	1.13%	3.73%	4.67%	8.37%	23.80%	27.92%	14.36%	6.37%	8.77%	1.67%
MSCI EM Eastern Europe	-1.12%	0.68%	0.87%	1.64%	53.08%	44.93%	39.12%	-10.91%	-1.78%	--
MSCI EM Latin America	0.50%	2.26%	2.12%	5.71%	37.65%	19.42%	10.19%	11.51%	7.22%	3.75%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.19%	1.19%	1.29%	2.23%	6.34%	2.63%	3.76%	-0.44%	1.92%	4.28%
Bloomberg Municipal State GO (10 Y)	0.22%	1.45%	1.54%	2.55%	3.53%	2.48%	3.22%	0.82%	2.32%	3.20%
Barclays US High Yield	0.10%	0.51%	0.41%	2.12%	6.79%	8.31%	9.00%	5.28%	5.76%	6.68%
Bloomberg Global Aggregate USD	0.18%	1.16%	1.26%	2.25%	6.39%	2.83%	3.94%	-0.32%	2.02%	4.32%
Bbg EM Gov't Diversified	0.06%	0.94%	0.70%	1.53%	13.21%	9.48%	8.08%	0.63%	2.86%	6.26%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.12%	0.87%	-0.66%	1.75%	3.69%	-3.96%	2.20%	6.47%	6.94%	3.76%
Alerian MLP	-0.29%	-1.22%	-2.43%	0.07%	7.14%	13.97%	19.00%	30.54%	6.76%	7.32%
Bloomberg Commodity	0.22%	-0.08%	0.60%	2.07%	7.71%	15.52%	0.23%	10.96%	3.64%	
US Dollar Index	0.33%	-0.29%	0.18%	2.01%	-6.80%	1.21%	1.72%	4.04%	2.44%	
Interest Rates	9/10/25	9/3/25	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%	3.61%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.59%	3.69%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.04%	4.22%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.66%	2.75%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.57%	1.62%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.80%	8.93%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.54%	6.60%	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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