



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.49%	1.88%	2.48%	6.91%	13.54%	19.08%	20.97%	15.90%	14.78%	1.12%
Communications Services	2.33%	3.51%	8.46%	15.07%	27.89%	46.83%	35.99%	17.61%	13.94%	0.62%
Consumer Discretionary	1.10%	1.86%	4.12%	10.50%	6.22%	25.86%	16.71%	10.54%	13.59%	0.57%
Consumer Staples	-1.01%	-1.00%	-0.73%	-1.54%	4.77%	0.44%	8.73%	8.51%	9.03%	2.28%
Energy	-0.29%	1.43%	-2.24%	4.28%	5.09%	6.39%	6.90%	27.32%	7.70%	3.29%
Financials	-0.21%	1.11%	-0.57%	2.49%	11.95%	22.38%	19.29%	18.97%	13.17%	1.39%
Health Care	-0.91%	-0.64%	-0.39%	1.54%	0.42%	-10.79%	4.07%	6.95%	8.63%	1.80%
Industrials	0.45%	0.68%	0.18%	3.20%	16.33%	18.33%	20.63%	15.93%	13.15%	1.22%
Materials	-0.80%	-1.00%	-0.99%	4.25%	10.54%	1.05%	9.68%	8.86%	10.26%	1.90%
Real Estate	-0.12%	0.95%	-0.04%	2.05%	5.63%	-3.21%	5.30%	6.35%	7.76%	3.22%
Technology	0.82%	3.25%	4.15%	9.93%	18.78%	27.80%	35.01%	22.61%	24.43%	0.52%
Utilities	0.19%	3.75%	1.60%	4.93%	14.80%	12.27%	8.02%	10.76%	11.04%	2.75%
DJIA	0.15%	0.87%	0.87%	4.49%	9.24%	12.76%	16.20%	12.51%	13.11%	1.56%
NASDAQ	0.94%	2.54%	4.20%	9.86%	16.29%	27.11%	25.49%	15.65%	17.17%	0.55%
Russell 3000	0.46%	1.68%	2.42%	7.10%	13.26%	19.09%	20.13%	15.23%	14.15%	1.12%
Russell 1000 Growth	0.93%	2.83%	4.28%	9.43%	16.10%	27.30%	27.49%	17.28%	18.19%	0.47%
Russell 1000 Value	-0.04%	0.54%	0.48%	4.28%	10.54%	11.08%	13.15%	13.17%	10.29%	1.84%
Russell Midcap	-0.14%	0.05%	0.58%	5.00%	10.08%	13.92%	13.84%	12.37%	10.87%	1.49%
Russell 2500	0.14%	0.11%	1.43%	8.82%	9.30%	13.09%	11.88%	11.68%	9.90%	1.35%
Russell 2000	0.36%	0.47%	1.71%	10.87%	8.89%	11.67%	11.22%	10.79%	8.96%	1.24%
MSCI AC World	0.47%	1.88%	2.71%	6.75%	17.77%	20.27%	19.81%	13.42%	11.99%	1.58%
MSCI AC World ex USA	0.42%	1.88%	3.05%	6.42%	25.91%	21.32%	17.68%	10.03%	8.36%	2.45%
MSCI EAFE	0.45%	1.05%	1.87%	4.74%	25.61%	18.47%	19.00%	11.01%	8.32%	2.69%
MSCI Europe	0.66%	0.99%	1.76%	3.42%	27.92%	17.86%	20.10%	11.93%	8.36%	2.86%
MSCI Japan	0.17%	1.07%	2.40%	7.99%	20.90%	18.99%	18.91%	9.21%	8.28%	2.02%
MSCI EM (Emerging Markets)	0.23%	3.71%	5.69%	9.41%	26.44%	26.08%	14.76%	6.62%	8.06%	1.99%
MSCI EM Asia	0.07%	4.06%	6.36%	10.11%	25.79%	27.43%	15.38%	6.14%	8.96%	1.62%
MSCI EM Eastern Europe	1.04%	-0.27%	2.72%	3.49%	55.88%	44.64%	40.10%	-10.93%	-1.70%	--
MSCI EM Latin America	1.60%	3.51%	4.98%	8.66%	41.50%	18.75%	12.43%	11.72%	7.34%	3.69%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.22%	0.25%	1.56%	2.51%	6.63%	2.88%	4.16%	-0.39%	1.98%	4.26%
Bloomberg Municipal State GO (10 Y)	0.07%	0.82%	2.00%	3.03%	4.01%	2.91%	3.52%	0.91%	2.32%	3.12%
Barclays US High Yield	0.16%	0.34%	0.76%	2.48%	7.16%	8.35%	9.69%	5.35%	5.81%	6.60%
Bloomberg Global Aggregate USD	0.21%	0.25%	1.53%	2.53%	6.68%	3.07%	4.33%	-0.28%	2.08%	4.29%
Bbg EM Gov't Diversified	0.17%	0.66%	1.20%	2.03%	13.76%	8.43%	8.73%	0.62%	2.85%	6.21%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.31%	0.59%	0.16%	2.59%	4.55%	-4.32%	4.51%	5.98%	6.76%	3.73%
Alerian MLP	-0.38%	0.08%	-2.47%	0.04%	7.10%	11.92%	19.09%	30.70%	6.76%	7.38%
Bloomberg Commodity	0.90%	1.58%	2.04%	3.53%	9.26%	13.66%	0.91%	11.18%	3.85%	
US Dollar Index	-0.22%	-0.07%	-0.22%	1.60%	-7.17%	1.20%	1.36%	4.02%	2.39%	
Interest Rates	9/15/25	9/8/25	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%	3.49%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.61%	3.57%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.05%	4.05%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.70%	2.64%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.60%	1.57%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.69%	8.78%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.43%	6.55%	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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