



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.13%	1.48%	2.36%	6.78%	13.40%	18.76%	21.21%	15.98%	14.67%	1.13%
Communications Services	0.27%	2.12%	8.76%	15.39%	28.24%	45.89%	36.38%	17.96%	14.00%	0.62%
Consumer Discretionary	0.82%	2.61%	4.98%	11.41%	7.10%	27.30%	17.36%	10.95%	13.56%	0.57%
Consumer Staples	0.24%	-1.15%	-0.50%	-1.30%	5.02%	0.32%	8.72%	8.68%	8.93%	2.27%
Energy	1.73%	2.64%	-0.55%	6.08%	6.90%	6.94%	8.29%	26.75%	7.59%	3.23%
Financials	-0.20%	0.44%	-0.76%	2.29%	11.73%	20.67%	19.60%	18.66%	13.08%	1.40%
Health Care	0.03%	-1.20%	-0.36%	1.58%	0.45%	-11.35%	4.17%	7.01%	8.59%	1.80%
Industrials	-0.28%	1.05%	-0.10%	2.91%	16.01%	17.37%	21.35%	15.64%	13.02%	1.22%
Materials	-0.51%	0.06%	-1.50%	3.72%	9.97%	-0.38%	10.07%	8.73%	10.04%	1.91%
Real Estate	-0.58%	0.39%	-0.61%	1.46%	5.02%	-4.09%	5.09%	6.10%	7.55%	3.25%
Technology	-0.57%	2.65%	3.56%	9.30%	18.10%	28.30%	34.97%	22.85%	24.29%	0.52%
Utilities	-1.81%	1.11%	-0.24%	3.03%	12.73%	9.43%	7.49%	10.40%	10.73%	2.80%
DJIA	-0.27%	0.16%	0.59%	4.20%	8.94%	11.78%	16.27%	12.42%	12.98%	1.56%
NASDAQ	-0.07%	2.09%	4.13%	9.79%	16.21%	27.69%	25.84%	15.92%	17.09%	0.55%
Russell 3000	-0.11%	1.37%	2.30%	6.97%	13.13%	18.71%	20.45%	15.29%	14.04%	1.12%
Russell 1000 Growth	-0.16%	2.35%	4.12%	9.26%	15.92%	27.54%	27.77%	17.56%	18.09%	0.46%
Russell 1000 Value	-0.07%	0.35%	0.41%	4.20%	10.46%	10.15%	13.47%	13.02%	10.17%	1.85%
Russell Midcap	-0.26%	0.18%	0.31%	4.72%	9.79%	12.82%	14.28%	12.22%	10.73%	1.50%
Russell 2500	-0.15%	0.66%	1.28%	8.65%	9.13%	12.27%	12.43%	11.49%	9.78%	1.35%
Russell 2000	-0.08%	0.94%	1.63%	10.78%	8.80%	11.23%	11.75%	10.57%	8.87%	1.24%
MSCI AC World	0.03%	1.60%	2.73%	6.77%	17.80%	20.07%	20.20%	13.45%	11.85%	1.59%
MSCI AC World ex USA	0.27%	1.86%	3.33%	6.71%	26.26%	21.34%	18.25%	10.00%	8.20%	2.45%
MSCI EAFE	-0.01%	1.10%	1.86%	4.73%	25.60%	18.25%	19.38%	10.89%	8.14%	2.69%
MSCI Europe	-0.34%	0.68%	1.41%	3.06%	27.48%	17.29%	20.45%	11.77%	8.13%	2.87%
MSCI Japan	0.83%	2.07%	3.26%	8.89%	21.91%	19.79%	19.34%	9.22%	8.31%	2.02%
MSCI EM (Emerging Markets)	0.88%	3.54%	6.63%	10.37%	27.56%	26.74%	15.67%	6.72%	7.94%	2.00%
MSCI EM Asia	1.03%	3.81%	7.45%	11.24%	27.08%	28.26%	16.45%	6.25%	8.88%	1.64%
MSCI EM Eastern Europe	-0.60%	0.08%	2.10%	2.87%	54.93%	44.50%	40.65%	-10.98%	-1.96%	--
MSCI EM Latin America	0.26%	3.58%	5.25%	8.95%	41.87%	18.36%	12.83%	11.78%	7.12%	3.60%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.04%	0.50%	1.61%	2.55%	6.68%	2.61%	4.20%	-0.38%	1.98%	4.25%
Bloomberg Municipal State GO (10 Y)	0.15%	0.83%	2.15%	3.18%	4.16%	3.02%	3.62%	0.94%	2.32%	3.09%
Barclays US High Yield	0.04%	0.48%	0.79%	2.51%	7.20%	8.09%	9.90%	5.33%	5.84%	6.60%
Bloomberg Global Aggregate USD	0.05%	0.50%	1.58%	2.58%	6.73%	2.81%	4.37%	-0.26%	2.09%	4.28%
Bbg EM Gov't Diversified	0.40%	0.95%	1.60%	2.44%	14.21%	8.74%	8.94%	0.67%	2.82%	6.19%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.53%	0.18%	-0.37%	2.04%	4.00%	-5.18%	4.28%	5.76%	6.58%	3.76%
Alerian MLP	0.63%	0.30%	-1.85%	0.67%	7.77%	11.65%	20.11%	30.25%	6.76%	7.35%
Bloomberg Commodity	0.64%	2.31%	2.70%	4.20%	9.96%	13.68%	1.41%	11.17%	3.81%	
US Dollar Index	-0.88%	-1.06%	-0.88%	0.93%	-7.78%	0.89%	1.12%	3.85%	2.34%	
Interest Rates	9/16/25	9/9/25	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	3.51%	3.54%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.59%	3.61%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.04%	4.08%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.70%	2.66%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.60%	1.56%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.73%	8.80%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.41%	6.54%	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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