



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.10%	1.08%	2.26%	6.67%	13.29%	18.61%	21.14%	16.15%	14.68%	1.13%
Communications Services	-0.06%	2.95%	8.69%	15.32%	28.16%	45.22%	36.30%	18.38%	14.12%	0.62%
Consumer Discretionary	-0.31%	3.93%	4.66%	11.07%	6.77%	26.13%	17.21%	11.23%	13.49%	0.57%
Consumer Staples	0.90%	0.80%	0.39%	-0.42%	5.96%	2.17%	9.03%	9.01%	9.03%	2.25%
Energy	0.28%	1.13%	-0.27%	6.38%	7.20%	5.75%	8.38%	26.76%	7.63%	3.22%
Financials	0.96%	1.74%	0.19%	3.27%	12.81%	21.20%	19.95%	19.12%	13.34%	1.38%
Health Care	0.24%	-0.06%	-0.13%	1.82%	0.69%	-10.23%	4.25%	7.13%	8.53%	1.79%
Industrials	-0.45%	-0.13%	-0.55%	2.45%	15.48%	16.24%	21.13%	15.48%	13.02%	1.23%
Materials	0.36%	0.19%	-1.14%	4.10%	10.37%	-0.19%	10.19%	8.65%	10.14%	1.91%
Real Estate	-0.06%	0.40%	-0.67%	1.39%	4.96%	-3.34%	5.06%	6.56%	7.44%	3.25%
Technology	-0.69%	0.18%	2.84%	8.54%	17.28%	27.52%	34.61%	22.89%	24.29%	0.52%
Utilities	0.29%	-0.30%	0.05%	3.33%	13.05%	9.84%	7.59%	10.64%	10.61%	2.79%
DJIA	0.57%	1.21%	1.17%	4.80%	9.57%	12.47%	16.47%	12.66%	13.09%	1.57%
NASDAQ	-0.32%	1.73%	3.80%	9.43%	15.83%	27.01%	25.67%	16.14%	17.04%	0.55%
Russell 3000	-0.07%	1.05%	2.23%	6.89%	13.04%	18.52%	20.39%	15.47%	14.05%	1.13%
Russell 1000 Growth	-0.42%	1.21%	3.69%	8.80%	15.43%	26.88%	27.55%	17.76%	18.04%	0.47%
Russell 1000 Value	0.28%	0.86%	0.69%	4.50%	10.77%	10.45%	13.55%	13.19%	10.25%	1.84%
Russell Midcap	-0.02%	0.24%	0.30%	4.71%	9.77%	12.48%	14.26%	12.35%	10.73%	1.50%
Russell 2500	-0.01%	0.74%	1.27%	8.64%	9.12%	11.65%	12.41%	11.61%	9.76%	1.35%
Russell 2000	0.18%	1.28%	1.81%	10.98%	9.00%	10.61%	11.80%	10.75%	8.84%	1.24%
MSCI AC World	-0.04%	1.23%	2.70%	6.73%	17.76%	19.98%	20.16%	13.63%	11.84%	1.59%
MSCI AC World ex USA	0.05%	1.48%	3.38%	6.76%	26.32%	21.32%	18.25%	10.18%	8.18%	2.46%
MSCI EAFE	-0.20%	0.71%	1.66%	4.52%	25.35%	18.10%	19.28%	11.00%	8.10%	2.69%
MSCI Europe	-0.02%	0.73%	1.39%	3.04%	27.46%	16.84%	20.41%	11.92%	8.13%	2.87%
MSCI Japan	-0.50%	1.06%	2.74%	8.35%	21.30%	21.31%	19.12%	9.19%	8.15%	1.98%
MSCI EM (Emerging Markets)	0.60%	3.15%	7.26%	11.03%	28.32%	26.97%	15.88%	7.03%	7.95%	2.00%
MSCI EM Asia	0.66%	3.33%	8.16%	11.98%	27.92%	28.61%	16.68%	6.61%	8.85%	1.64%
MSCI EM Eastern Europe	-0.50%	0.71%	1.59%	2.36%	54.16%	41.80%	40.36%	-10.99%	-1.97%	--
MSCI EM Latin America	0.39%	3.46%	5.66%	9.37%	42.42%	18.64%	12.96%	11.91%	7.19%	3.58%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.18%	0.14%	1.43%	2.37%	6.49%	2.59%	4.13%	-0.42%	1.92%	4.28%
Bloomberg Municipal State GO (10 Y)	0.08%	0.69%	2.23%	3.26%	4.24%	2.98%	3.64%	0.94%	2.32%	3.08%
Barclays US High Yield	-0.02%	0.37%	0.78%	2.50%	7.18%	7.90%	9.88%	5.34%	5.84%	6.61%
Bloomberg Global Aggregate USD	-0.17%	0.15%	1.41%	2.41%	6.55%	2.78%	4.30%	-0.30%	2.02%	4.31%
Bbg EM Gov't Diversified	0.15%	1.04%	1.75%	2.59%	14.38%	8.83%	8.98%	0.73%	2.82%	6.18%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.18%	0.11%	-0.55%	1.86%	3.81%	-4.71%	4.21%	6.13%	6.44%	3.77%
Alerian MLP	0.31%	0.90%	-1.55%	0.98%	8.10%	12.05%	20.21%	30.64%	6.76%	7.34%
Bloomberg Commodity	-1.05%	1.01%	1.62%	3.10%	8.80%	12.16%	1.05%	10.91%	3.75%	
US Dollar Index	-0.37%	-0.77%	-0.58%	1.23%	-7.51%	1.04%	1.22%	3.96%	2.47%	
Interest Rates	9/17/25	9/10/25	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	3.52%	3.54%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.62%	3.59%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.06%	4.04%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.68%	2.66%	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	8.73%	8.74%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.41%	#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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