



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.48%	0.71%	2.75%	7.19%	13.83%	19.52%	21.31%	16.52%	14.93%	1.12%
Communications Services	0.28%	3.06%	9.00%	15.64%	28.52%	45.60%	36.38%	18.71%	14.27%	0.62%
Consumer Discretionary	-0.50%	1.68%	4.13%	10.51%	6.23%	25.74%	17.00%	11.44%	13.61%	0.57%
Consumer Staples	-1.03%	-1.18%	-0.64%	-1.45%	4.86%	1.56%	8.65%	8.99%	9.05%	2.27%
Energy	-0.43%	0.73%	-0.70%	5.92%	6.74%	5.04%	8.22%	26.95%	7.87%	3.24%
Financials	0.06%	0.13%	0.26%	3.34%	12.88%	21.61%	19.95%	19.19%	13.56%	1.38%
Health Care	0.18%	-1.59%	0.05%	2.00%	0.87%	-9.93%	4.30%	7.19%	8.70%	1.79%
Industrials	1.06%	-0.04%	0.50%	3.53%	16.70%	17.56%	21.53%	15.98%	13.38%	1.22%
Materials	-0.14%	-2.04%	-1.28%	3.95%	10.21%	0.05%	10.13%	8.99%	10.35%	1.91%
Real Estate	0.10%	-1.12%	-0.57%	1.50%	5.06%	-2.99%	5.09%	7.00%	7.48%	3.25%
Technology	1.36%	1.36%	4.24%	10.02%	18.87%	29.91%	35.16%	23.63%	24.62%	0.52%
Utilities	0.05%	-0.73%	0.10%	3.38%	13.11%	10.74%	7.59%	11.05%	10.69%	2.79%
DJIA	0.27%	0.13%	1.44%	5.09%	9.87%	13.04%	16.55%	12.92%	13.32%	1.56%
NASDAQ	0.94%	1.95%	4.77%	10.46%	16.92%	28.60%	26.03%	16.61%	17.31%	0.55%
Russell 3000	0.63%	0.76%	2.87%	7.57%	13.76%	19.55%	20.62%	15.83%	14.30%	1.12%
Russell 1000 Growth	0.60%	1.30%	4.31%	9.45%	16.12%	28.05%	27.77%	18.15%	18.26%	0.46%
Russell 1000 Value	0.49%	0.05%	1.19%	5.02%	11.32%	11.18%	13.72%	13.51%	10.51%	1.83%
Russell Midcap	0.83%	-0.41%	1.13%	5.58%	10.69%	13.56%	14.55%	12.75%	11.00%	1.49%
Russell 2500	1.72%	0.73%	3.01%	10.51%	11.00%	13.49%	13.03%	12.15%	10.11%	1.34%
Russell 2000	2.51%	1.95%	4.37%	13.76%	11.73%	13.33%	12.70%	11.38%	9.27%	1.21%
MSCI AC World	0.29%	0.83%	2.99%	7.04%	18.10%	20.68%	20.25%	13.82%	12.01%	1.59%
MSCI AC World ex USA	-0.14%	0.93%	3.24%	6.62%	26.14%	21.54%	18.17%	10.14%	8.24%	2.45%
MSCI EAFE	-0.18%	0.08%	1.47%	4.34%	25.12%	18.29%	19.18%	10.95%	8.19%	2.69%
MSCI Europe	0.21%	0.42%	1.61%	3.26%	27.73%	17.77%	20.47%	12.02%	8.30%	2.87%
MSCI Japan	-0.69%	-0.06%	2.02%	7.59%	20.46%	20.30%	18.82%	8.89%	8.21%	1.98%
MSCI EM (Emerging Markets)	-0.15%	2.78%	7.11%	10.87%	28.13%	27.10%	15.80%	6.97%	7.90%	1.97%
MSCI EM Asia	-0.20%	3.02%	7.94%	11.75%	27.66%	28.80%	16.58%	6.46%	8.75%	1.61%
MSCI EM Eastern Europe	-0.69%	-1.36%	0.89%	1.65%	53.10%	41.07%	39.98%	-10.90%	-1.99%	--
MSCI EM Latin America	-0.39%	1.72%	5.25%	8.95%	41.87%	18.07%	12.80%	12.20%	7.32%	3.60%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.28%	-0.33%	1.15%	2.09%	6.19%	2.65%	4.03%	-0.46%	1.85%	4.33%
Bloomberg Municipal State GO (10 Y)	-0.06%	0.31%	2.17%	3.20%	4.18%	2.90%	3.62%	0.93%	2.32%	3.09%
Barclays US High Yield	0.12%	0.27%	0.89%	2.62%	7.30%	7.93%	9.91%	5.37%	5.87%	6.57%
Bloomberg Global Aggregate USD	-0.26%	-0.30%	1.14%	2.14%	6.27%	2.84%	4.21%	-0.34%	1.96%	4.36%
Bbg EM Gov't Diversified	-0.24%	0.62%	1.51%	2.35%	14.11%	8.27%	8.88%	0.64%	2.73%	6.18%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.13%	-1.27%	-0.42%	1.99%	3.94%	-4.38%	4.25%	6.61%	6.49%	3.76%
Alerian MLP	0.27%	0.61%	-1.29%	1.24%	8.39%	12.82%	20.28%	30.95%	6.76%	7.33%
Bloomberg Commodity	-0.82%	0.33%	0.78%	2.26%	7.91%	11.11%	0.77%	10.55%	3.82%	
US Dollar Index	0.77%	-0.07%	-0.11%	1.71%	-7.07%	1.78%	1.38%	4.07%	2.48%	
Interest Rates	9/18/25	9/11/25	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	3.57%	3.52%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.67%	3.59%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.11%	4.01%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.72%	2.65%	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	8.70%	8.65%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.39%	6.50%	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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