



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.45%	1.20%	3.72%	8.19%	14.90%	18.85%	22.97%	16.76%	15.12%	1.11%
Communications Services	-0.90%	0.10%	8.58%	15.19%	28.02%	41.72%	37.87%	18.46%	14.31%	0.62%
Consumer Discretionary	-0.43%	-0.08%	4.04%	10.41%	6.14%	22.94%	18.95%	11.02%	13.66%	0.57%
Consumer Staples	-0.89%	-1.04%	-1.77%	-2.57%	3.67%	0.58%	8.41%	8.75%	8.95%	2.30%
Energy	-0.18%	0.09%	-2.15%	4.37%	5.18%	2.61%	8.59%	27.68%	7.76%	3.29%
Financials	-0.14%	0.91%	0.34%	3.42%	12.97%	20.66%	21.71%	20.02%	13.60%	1.36%
Health Care	-0.04%	0.25%	-0.14%	1.80%	0.67%	-10.10%	5.25%	7.59%	8.90%	1.79%
Industrials	0.38%	0.91%	1.09%	4.14%	17.39%	17.03%	22.95%	16.68%	13.55%	1.20%
Materials	0.00%	-0.07%	-1.06%	4.18%	10.46%	-0.57%	11.61%	9.75%	10.55%	1.91%
Real Estate	0.32%	-0.68%	-0.72%	1.35%	4.91%	-2.75%	6.92%	7.29%	7.52%	3.25%
Technology	1.76%	3.05%	7.33%	13.28%	22.40%	30.39%	37.62%	23.76%	25.06%	0.50%
Utilities	0.94%	0.11%	1.71%	5.04%	14.93%	10.19%	8.86%	11.39%	10.95%	2.74%
DJIA	0.14%	1.09%	1.97%	5.63%	10.43%	12.12%	17.75%	13.33%	13.41%	1.56%
NASDAQ	0.71%	1.98%	6.27%	12.04%	18.59%	27.70%	28.13%	16.57%	17.65%	0.55%
Russell 3000	0.41%	1.24%	3.69%	8.42%	14.66%	18.74%	22.32%	16.07%	14.50%	1.11%
Russell 1000 Growth	0.88%	1.86%	6.23%	11.47%	18.26%	27.60%	29.94%	18.18%	18.59%	0.46%
Russell 1000 Value	-0.13%	0.43%	0.91%	4.72%	11.01%	10.05%	14.95%	13.90%	10.56%	1.84%
Russell Midcap	0.04%	0.22%	0.79%	5.23%	10.32%	12.23%	16.17%	12.90%	11.11%	1.50%
Russell 2500	0.22%	1.13%	2.58%	10.05%	10.53%	11.84%	14.63%	12.49%	10.23%	1.35%
Russell 2000	0.60%	2.43%	4.19%	13.57%	11.54%	12.04%	14.30%	11.92%	9.44%	1.21%
MSCI AC World	0.35%	0.89%	3.63%	7.70%	18.82%	19.80%	21.77%	14.24%	12.29%	1.59%
MSCI AC World ex USA	0.15%	0.19%	3.25%	6.62%	26.15%	20.33%	19.35%	10.76%	8.58%	2.45%
MSCI EAFE	0.11%	-0.52%	1.34%	4.20%	24.96%	17.36%	20.40%	11.64%	8.53%	2.69%
MSCI Europe	0.00%	-0.44%	1.32%	2.96%	27.36%	17.24%	22.09%	12.93%	8.76%	2.87%
MSCI Japan	0.53%	-0.10%	2.30%	7.89%	20.78%	18.65%	19.26%	9.09%	8.25%	1.98%
MSCI EM (Emerging Markets)	0.21%	1.18%	6.94%	10.70%	27.93%	24.75%	16.66%	7.43%	8.16%	1.97%
MSCI EM Asia	0.19%	1.14%	7.57%	11.37%	27.22%	25.64%	17.60%	6.83%	8.91%	1.62%
MSCI EM Eastern Europe	0.16%	-1.82%	0.85%	1.62%	53.04%	41.45%	41.34%	-10.22%	-1.55%	--
MSCI EM Latin America	0.06%	0.43%	5.42%	9.13%	42.10%	20.46%	11.65%	12.98%	7.81%	3.54%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.15%	-0.55%	1.00%	1.94%	6.04%	2.53%	4.45%	-0.50%	1.84%	4.35%
Bloomberg Municipal State GO (10 Y)	0.01%	0.18%	2.19%	3.22%	4.20%	2.91%	4.02%	0.98%	2.32%	3.09%
Barclays US High Yield	0.04%	0.22%	0.97%	2.70%	7.39%	7.70%	10.26%	5.57%	5.95%	6.59%
Bloomberg Global Aggregate USD	-0.14%	-0.52%	1.00%	2.00%	6.12%	2.72%	4.62%	-0.38%	1.94%	4.38%
Bbg EM Gov't Diversified	0.05%	0.16%	1.36%	2.19%	13.94%	7.70%	9.34%	0.86%	2.91%	6.18%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.12%	-0.95%	-0.80%	1.61%	3.55%	-4.35%	6.00%	6.93%	6.51%	3.77%
Alerian MLP	-0.99%	-2.36%	-4.77%	-2.33%	4.57%	9.63%	20.18%	30.97%	6.76%	7.57%
Bloomberg Commodity	0.04%	-1.56%	0.45%	1.92%	7.56%	9.56%	0.86%	11.08%	3.79%	
US Dollar Index	-0.26%	0.15%	-0.07%	1.75%	-7.04%	1.63%	0.90%	3.84%	2.33%	
Interest Rates	9/22/25	9/15/25	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	3.61%	3.54%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.71%	3.61%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.15%	4.05%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.75%	2.70%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.66%	1.60%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.69%	8.73%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.33%	6.43%	7.28%	6.99%	6.66%	3.27%	2.87%	3.86%	4.64%	
US Prime Rate	7.25%	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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