



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.28%	0.58%	2.85%	7.29%	13.95%	17.24%	23.31%	17.06%	15.09%	1.11%
Communications Services	-0.82%	-1.44%	7.13%	13.65%	26.31%	39.49%	38.02%	18.69%	14.23%	0.63%
Consumer Discretionary	0.70%	-1.34%	3.26%	9.58%	5.34%	19.56%	19.54%	11.33%	13.64%	0.57%
Consumer Staples	0.13%	-1.67%	-1.29%	-2.09%	4.18%	0.89%	9.21%	9.01%	8.97%	2.29%
Energy	1.23%	1.03%	0.75%	7.47%	8.30%	4.58%	12.21%	29.61%	8.18%	3.19%
Financials	-0.23%	-0.53%	-0.34%	2.73%	12.21%	20.83%	22.04%	20.34%	13.60%	1.37%
Health Care	-0.36%	-0.13%	-0.26%	1.68%	0.55%	-9.79%	5.39%	7.90%	9.01%	1.79%
Industrials	-0.51%	1.15%	0.59%	3.63%	16.81%	14.89%	23.49%	16.95%	13.65%	1.21%
Materials	-1.59%	-1.77%	-2.89%	2.25%	8.41%	-4.52%	11.67%	9.84%	10.61%	1.94%
Real Estate	-1.01%	-0.25%	-0.92%	1.14%	4.69%	-3.99%	7.30%	7.79%	7.56%	3.26%
Technology	-0.51%	2.65%	5.56%	11.41%	20.39%	27.34%	37.43%	24.00%	24.82%	0.50%
Utilities	0.73%	2.95%	3.00%	6.37%	16.39%	11.34%	9.73%	11.76%	10.97%	2.71%
DJIA	-0.37%	0.22%	1.40%	5.04%	9.81%	11.11%	18.14%	13.60%	13.44%	1.56%
NASDAQ	-0.33%	1.08%	4.91%	10.61%	17.08%	25.20%	28.31%	16.90%	17.55%	0.55%
Russell 3000	-0.36%	0.52%	2.76%	7.45%	13.63%	17.10%	22.67%	16.38%	14.46%	1.12%
Russell 1000 Growth	-0.47%	0.86%	4.58%	9.74%	16.43%	24.90%	29.92%	18.39%	18.49%	0.47%
Russell 1000 Value	-0.18%	0.11%	0.80%	4.61%	10.89%	9.41%	15.63%	14.31%	10.61%	1.84%
Russell Midcap	-0.52%	-0.05%	0.24%	4.65%	9.71%	10.83%	16.64%	13.25%	11.13%	1.50%
Russell 2500	-0.88%	0.21%	1.49%	8.88%	9.36%	10.30%	15.07%	12.84%	10.19%	1.37%
Russell 2000	-0.92%	1.16%	2.99%	12.26%	10.26%	10.94%	14.79%	12.35%	9.37%	1.22%
MSCI AC World	-0.29%	0.31%	3.01%	7.06%	18.12%	18.08%	22.33%	14.54%	12.34%	1.59%
MSCI AC World ex USA	-0.28%	-0.21%	3.17%	6.54%	26.06%	18.52%	20.29%	11.08%	8.73%	2.45%
MSCI EAFE	-0.57%	-0.57%	1.08%	3.93%	24.63%	15.78%	21.35%	11.83%	8.63%	2.69%
MSCI Europe	-0.62%	-0.26%	1.13%	2.78%	27.13%	15.64%	23.40%	13.12%	8.82%	2.88%
MSCI Japan	-0.26%	-0.62%	2.10%	7.67%	20.54%	17.10%	19.49%	9.37%	8.43%	1.98%
MSCI EM (Emerging Markets)	0.41%	0.33%	7.62%	11.39%	28.74%	22.69%	17.60%	8.07%	8.54%	1.97%
MSCI EM Asia	0.41%	-0.05%	8.11%	11.93%	27.86%	23.26%	18.43%	7.48%	9.28%	1.62%
MSCI EM Eastern Europe	0.04%	-0.23%	1.35%	2.12%	53.80%	39.31%	43.50%	-9.93%	-1.31%	--
MSCI EM Latin America	-0.38%	0.64%	6.34%	10.07%	43.34%	19.10%	13.23%	13.83%	8.37%	3.52%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.19%	-0.40%	1.02%	1.96%	6.06%	2.47%	4.54%	-0.48%	1.84%	4.36%
Bloomberg Municipal State GO (10 Y)	-0.15%	-0.25%	1.97%	3.00%	3.98%	2.74%	4.04%	0.90%	2.32%	3.14%
Barclays US High Yield	-0.07%	0.14%	0.92%	2.64%	7.33%	7.68%	10.58%	5.69%	6.01%	6.62%
Bloomberg Global Aggregate USD	-0.18%	-0.38%	1.02%	2.02%	6.14%	2.66%	4.71%	-0.35%	1.95%	4.39%
Bbg EM Gov't Diversified	-0.41%	-0.68%	1.06%	1.89%	13.60%	7.12%	9.55%	1.04%	2.99%	6.17%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.93%	-0.44%	-0.99%	1.41%	3.35%	-5.51%	6.43%	7.44%	6.52%	3.78%
Alerian MLP	1.61%	-0.95%	-2.49%	0.02%	7.08%	11.16%	23.68%	33.05%	6.76%	7.40%
Bloomberg Commodity	0.31%	-0.12%	1.49%	2.98%	8.67%	8.35%	2.27%	11.35%	3.88%	
US Dollar Index	0.55%	1.07%	0.47%	2.31%	-6.53%	2.41%	0.52%	3.87%	2.42%	
Interest Rates	9/24/25	9/17/25	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	3.70%	3.62%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.16%	4.06%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.75%	2.68%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.65%	1.60%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.67%	8.70%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.33%	6.41%	7.28%	6.99%	6.66%	3.27%	2.87%	3.86%	4.64%	
US Prime Rate	7.25%	7.25%	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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