



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.42%	0.49%	3.65%	8.12%	14.83%	17.52%	24.86%	16.41%	15.25%	1.11%
Communications Services	-0.47%	-2.23%	5.60%	12.04%	24.51%	35.40%	38.83%	17.68%	14.06%	0.64%
Consumer Discretionary	-0.55%	0.66%	3.22%	9.54%	5.30%	20.22%	20.51%	10.53%	13.70%	0.57%
Consumer Staples	0.29%	-0.14%	-1.56%	-2.36%	3.89%	0.51%	10.55%	8.48%	8.92%	2.29%
Energy	-1.07%	0.05%	-0.43%	6.21%	7.04%	4.41%	11.07%	29.50%	8.15%	3.23%
Financials	-0.43%	0.25%	0.14%	3.22%	12.75%	20.66%	23.25%	19.64%	13.56%	1.37%
Health Care	2.46%	1.68%	1.78%	3.76%	2.61%	-7.92%	6.59%	7.47%	9.63%	1.76%
Industrials	0.82%	0.83%	1.95%	5.02%	18.38%	15.63%	25.05%	16.76%	13.74%	1.19%
Materials	0.57%	-0.77%	-2.08%	3.10%	9.32%	-4.25%	12.23%	9.44%	10.78%	1.93%
Real Estate	0.46%	0.40%	0.49%	2.59%	6.19%	-2.23%	9.21%	7.29%	7.59%	3.22%
Technology	0.86%	1.08%	7.25%	13.19%	22.31%	28.10%	40.19%	23.21%	25.12%	0.50%
Utilities	0.22%	1.86%	4.16%	7.57%	17.69%	11.16%	13.57%	11.40%	10.84%	2.68%
DJIA	0.18%	0.23%	2.00%	5.67%	10.47%	11.45%	19.58%	12.94%	13.45%	1.55%
NASDAQ	0.31%	0.39%	5.68%	11.41%	17.93%	25.31%	29.83%	16.01%	17.92%	--
Russell 3000	0.33%	0.31%	3.45%	8.18%	14.40%	17.34%	24.05%	15.69%	14.66%	1.11%
Russell 1000 Growth	0.47%	0.22%	5.31%	10.51%	17.24%	25.42%	31.52%	17.52%	18.76%	0.47%
Russell 1000 Value	0.21%	0.50%	1.49%	5.33%	11.65%	9.40%	16.92%	13.83%	10.68%	1.83%
Russell Midcap	0.05%	0.13%	0.89%	5.33%	10.42%	11.06%	17.64%	12.62%	11.35%	1.49%
Russell 2500	0.09%	-0.77%	1.60%	9.00%	9.48%	10.12%	15.60%	12.05%	10.48%	1.37%
Russell 2000	0.10%	-0.80%	3.11%	12.39%	10.39%	10.71%	15.17%	11.52%	9.73%	1.22%
MSCI AC World	0.44%	0.33%	3.66%	7.74%	18.86%	17.73%	23.64%	14.02%	12.43%	1.58%
MSCI AC World ex USA	0.59%	0.18%	3.64%	7.03%	26.64%	17.06%	21.26%	10.78%	8.73%	2.47%
MSCI EAFE	0.68%	0.30%	1.96%	4.83%	25.72%	15.52%	22.26%	11.67%	8.67%	2.72%
MSCI Europe	0.62%	0.23%	2.00%	3.66%	28.22%	15.75%	23.62%	12.84%	8.77%	2.86%
MSCI Japan	0.90%	0.20%	2.58%	8.18%	21.11%	16.71%	21.59%	9.34%	8.60%	1.99%
MSCI EM (Emerging Markets)	0.48%	0.01%	7.18%	10.95%	28.22%	18.10%	18.76%	7.48%	8.40%	--
MSCI EM Asia	0.50%	-0.18%	7.48%	11.28%	27.12%	17.26%	19.68%	6.76%	9.17%	1.64%
MSCI EM Eastern Europe	0.06%	0.20%	1.52%	2.29%	54.06%	40.83%	46.36%	-9.97%	-1.43%	--
MSCI EM Latin America	0.09%	-0.16%	6.57%	10.31%	43.65%	20.96%	14.52%	14.06%	8.07%	3.49%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.04%	-0.12%	1.09%	2.03%	6.13%	2.87%	4.92%	-0.45%	1.83%	4.37%
Bloomberg Municipal State GO (10 Y)	0.07%	-0.36%	1.76%	2.78%	3.76%	2.39%	4.23%	0.90%	2.40%	3.22%
Barclays US High Yield	0.00%	-0.17%	0.82%	2.54%	7.22%	7.38%	11.06%	5.53%	6.15%	6.70%
Bloomberg Global Aggregate USD	-0.04%	-0.12%	1.09%	2.09%	6.21%	3.05%	5.10%	-0.32%	1.94%	4.40%
Bbg EM Gov't Diversified	0.06%	-0.62%	0.85%	1.68%	13.37%	6.18%	10.14%	0.91%	2.89%	6.20%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.62%	0.39%	0.32%	2.76%	4.72%	-3.72%	8.50%	6.93%	6.63%	3.74%
Alerian MLP	0.07%	0.35%	-3.70%	-1.22%	5.75%	10.93%	22.33%	32.14%	8.14%	7.49%
Bloomberg Commodity	-0.36%	0.96%	2.15%	3.65%	9.38%	8.85%	2.75%	11.50%	3.95%	
US Dollar Index	-0.36%	0.62%	0.47%	2.31%	-6.53%	1.97%	0.77%	3.98%	2.38%	
Interest Rates	9/30/25	9/23/25	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	3.60%	3.53%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.74%	3.68%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.16%	4.12%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.71%	2.75%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.63%	1.65%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.76%	8.67%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.36%	6.33%	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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