



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	1.55%	0.52%	-1.87%	0.42%	15.32%	13.73%	20.20%	14.66%	14.29%	1.12%
Communications Services	3.94%	5.90%	4.40%	6.33%	32.40%	39.60%	39.56%	16.71%	14.19%	0.61%
Consumer Discretionary	1.86%	-0.65%	-5.60%	-3.36%	1.77%	6.64%	19.68%	8.67%	12.29%	0.60%
Consumer Staples	-1.32%	0.09%	0.94%	-1.40%	2.44%	-1.11%	5.19%	7.21%	8.24%	2.35%
Energy	-0.32%	-1.32%	1.16%	0.02%	7.06%	-5.00%	2.31%	22.12%	6.91%	3.39%
Financials	0.47%	0.90%	-0.83%	-3.64%	8.65%	3.87%	14.99%	14.67%	12.26%	1.44%
Health Care	0.47%	2.39%	7.74%	11.60%	14.51%	9.67%	6.26%	9.17%	9.99%	1.59%
Industrials	0.29%	-0.33%	-3.20%	-2.75%	15.13%	6.91%	16.00%	12.63%	12.27%	1.25%
Materials	0.28%	1.19%	1.07%	-4.03%	4.91%	-5.60%	3.84%	5.88%	8.79%	2.01%
Real Estate	0.18%	0.72%	0.30%	-2.33%	3.71%	-3.31%	5.91%	5.90%	6.71%	3.31%
Technology	2.49%	-0.90%	-5.96%	-0.10%	22.19%	23.81%	34.55%	22.16%	23.72%	0.51%
Utilities	1.14%	-0.50%	0.07%	2.17%	20.25%	12.59%	11.58%	10.14%	11.18%	2.67%
DJIA	0.44%	-0.24%	-2.21%	0.32%	10.83%	6.63%	12.85%	11.19%	12.43%	1.59%
NASDAQ	2.69%	0.75%	-3.54%	1.02%	19.13%	21.06%	27.42%	14.50%	16.85%	0.56%
Russell 3000	1.55%	0.69%	-2.00%	0.10%	14.51%	12.11%	19.40%	13.53%	13.71%	1.13%
Russell 1000 Growth	2.26%	0.25%	-3.66%	-0.16%	17.06%	19.26%	27.77%	16.34%	17.69%	0.48%
Russell 1000 Value	0.71%	0.96%	-0.01%	0.43%	12.14%	5.49%	11.52%	10.99%	9.86%	1.85%
Russell Midcap	0.78%	1.21%	-1.63%	-2.44%	7.73%	1.08%	11.77%	8.94%	10.38%	1.55%
Russell 2500	1.46%	2.46%	-1.83%	-1.17%	8.20%	1.15%	10.66%	7.76%	9.59%	1.42%
Russell 2000	1.89%	3.13%	-2.54%	-0.77%	9.54%	1.68%	10.58%	6.83%	8.79%	1.24%
MSCI AC World	1.20%	-0.52%	-2.27%	-0.06%	18.79%	17.10%	18.55%	11.86%	11.62%	1.62%
MSCI AC World ex USA	0.55%	-2.32%	-2.55%	-0.57%	25.92%	24.60%	15.46%	8.23%	8.08%	2.50%
MSCI EAFE	0.40%	-2.30%	-2.15%	-0.98%	24.49%	23.82%	15.13%	9.13%	7.96%	2.78%
MSCI Europe	0.40%	-2.12%	-1.51%	-0.76%	27.24%	26.26%	15.85%	10.43%	8.32%	2.95%
MSCI Japan	-0.15%	-2.83%	-3.43%	-0.15%	20.93%	23.55%	15.74%	7.17%	7.40%	2.07%
MSCI EM (Emerging Markets)	0.61%	-3.28%	-4.17%	-0.16%	28.02%	26.78%	15.63%	4.78%	7.74%	2.00%
MSCI EM Asia	0.68%	-3.65%	-4.99%	-0.30%	26.74%	26.38%	16.53%	4.10%	8.47%	1.65%
MSCI EM Eastern Europe	0.71%	-1.34%	-0.38%	4.67%	61.25%	61.94%	34.89%	-11.21%	-1.37%	--
MSCI EM Latin America	0.68%	-1.57%	2.15%	3.10%	48.11%	33.62%	12.37%	10.28%	7.42%	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%	0.58%	0.43%	1.05%	7.25%	6.94%	4.56%	-0.29%	1.98%	4.29%
Bloomberg Municipal State GO (10 Y)	0.06%	-0.02%	0.16%	1.54%	5.36%	4.95%	3.72%	1.00%	2.50%	3.03%
Barclays US High Yield	0.20%	0.29%	-0.02%	0.14%	7.37%	7.35%	9.43%	4.68%	6.14%	6.85%
Bloomberg Global Aggregate USD	0.18%	0.56%	0.41%	1.04%	7.32%	7.02%	4.75%	-0.19%	2.08%	4.32%
Bbg EM Gov't Diversified	0.28%	-0.45%	-0.21%	0.06%	13.43%	12.47%	8.01%	0.01%	2.54%	6.35%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.13%	0.79%	0.64%	-1.49%	3.16%	-3.31%	5.21%	5.01%	5.92%	3.86%
Alerian MLP	-0.27%	0.46%	3.81%	3.10%	9.03%	5.20%	18.47%	24.68%	7.07%	7.17%
Bloomberg Commodity	0.02%	-1.19%	0.45%	3.35%	13.04%	13.28%	2.17%	11.04%	4.99%	
US Dollar Index	0.00%	0.64%	0.67%	3.20%	-3.54%	-2.14%	3.62%	5.03%	2.39%	
Interest Rates	11/24/25	11/17/25	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	3.46%	3.60%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	3.61%	3.72%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.04%	4.13%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.70%	2.71%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.78%	1.72%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	8.99%	8.92%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.36%	6.32%	7.28%	6.99%	6.66%	3.27%	2.87%	3.86%	4.64%	
US Prime Rate	7.00%	7.00%	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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