



| Equities                                  | 1 Day  | 1 Week  | MTD      | QTD      | YTD      | 1 Year   | 3 Years  | 5 Years  | 10 Years | Yield |
|-------------------------------------------|--------|---------|----------|----------|----------|----------|----------|----------|----------|-------|
| S&P 500                                   | 0.78%  | -1.08%  | -0.12%   | 0.56%    | 0.56%    | 20.31%   | 20.89%   | 14.37%   | 15.03%   | 1.10% |
| Communications Services                   | 0.58%  | 0.31%   | -0.37%   | -0.01%   | -0.01%   | 32.77%   | 37.43%   | 15.20%   | 12.70%   | 0.61% |
| Consumer Discretionary                    | 2.24%  | -0.06%  | 0.30%    | -3.47%   | -3.47%   | 12.52%   | 18.71%   | 9.11%    | 12.96%   | 0.58% |
| Consumer Staples                          | -0.53% | -1.72%  | -2.83%   | 12.98%   | 12.98%   | 10.10%   | 11.63%   | 11.32%   | 9.12%    | 2.07% |
| Energy                                    | -0.72% | 2.21%   | 0.26%    | 25.55%   | 25.55%   | 34.25%   | 12.61%   | 21.93%   | 10.58%   | 2.72% |
| Financials                                | 0.58%  | -0.58%  | 0.14%    | -5.90%   | -5.90%   | 4.70%    | 14.57%   | 11.23%   | 13.21%   | 1.46% |
| Health Care                               | 0.19%  | -0.43%  | -1.95%   | 1.50%    | 1.50%    | 7.91%    | 8.57%    | 9.03%    | 10.77%   | 1.59% |
| Industrials                               | 0.32%  | 0.24%   | -0.67%   | 13.50%   | 13.50%   | 35.32%   | 21.15%   | 15.84%   | 14.28%   | 1.08% |
| Materials                                 | -0.06% | -2.38%  | -3.09%   | 14.18%   | 14.18%   | 23.60%   | 9.20%    | 9.31%    | 11.35%   | 1.64% |
| Real Estate                               | 0.13%  | 0.77%   | -0.23%   | 9.13%    | 9.13%    | 6.49%    | 8.23%    | 7.60%    | 7.52%    | 3.15% |
| Technology                                | 1.28%  | -2.86%  | 1.12%    | -4.45%   | -4.45%   | 28.08%   | 31.26%   | 20.47%   | 23.99%   | 0.53% |
| Utilities                                 | 0.41%  | -0.17%  | -0.98%   | 10.76%   | 10.76%   | 24.55%   | 16.12%   | 13.44%   | 10.76%   | 2.53% |
| DJIA                                      | 0.49%  | -1.39%  | -0.39%   | 1.72%    | 1.72%    | 16.54%   | 15.51%   | 11.61%   | 13.47%   | 1.56% |
| NASDAQ                                    | 1.29%  | -1.48%  | 0.62%    | -1.79%   | -1.79%   | 25.42%   | 25.74%   | 13.17%   | 17.73%   | 0.56% |
| Russell 3000                              | 0.76%  | -1.00%  | -0.14%   | 0.93%    | 0.93%    | 20.43%   | 20.02%   | 13.06%   | 14.59%   | 1.11% |
| Russell 1000 Growth                       | 1.02%  | -1.11%  | 0.65%    | -4.20%   | -4.20%   | 19.11%   | 25.42%   | 15.22%   | 17.89%   | 0.52% |
| Russell 1000 Value                        | 0.47%  | -0.74%  | -0.99%   | 6.22%    | 6.22%    | 20.62%   | 14.88%   | 11.44%   | 11.28%   | 1.72% |
| Russell Midcap                            | 0.43%  | -0.44%  | -0.82%   | 6.12%    | 6.12%    | 19.42%   | 13.66%   | 9.28%    | 11.79%   | 1.44% |
| Russell 2500                              | 0.69%  | -1.08%  | -0.44%   | 7.08%    | 7.08%    | 26.24%   | 12.84%   | 7.34%    | 11.45%   | 1.28% |
| Russell 2000                              | 1.07%  | -0.99%  | 0.16%    | 6.37%    | 6.37%    | 28.35%   | 12.52%   | 5.59%    | 10.77%   | 1.13% |
| MSCI AC World                             | 0.18%  | -2.78%  | -2.37%   | 1.86%    | 1.86%    | 24.07%   | 19.54%   | 11.77%   | 12.74%   | 1.50% |
| MSCI AC World ex USA                      | -0.84% | -5.60%  | -6.04%   | 4.61%    | 4.61%    | 31.83%   | 17.44%   | 8.75%    | 9.76%    | 2.21% |
| MSCI EAFE                                 | 0.40%  | -4.64%  | -5.38%   | 4.18%    | 4.18%    | 27.02%   | 16.78%   | 9.88%    | 9.65%    | 2.53% |
| MSCI Europe                               | 1.94%  | -4.52%  | -4.65%   | 2.87%    | 2.87%    | 26.12%   | 16.70%   | 11.10%   | 9.98%    | 2.74% |
| MSCI Japan                                | -3.13% | -5.94%  | -8.33%   | 6.10%    | 6.10%    | 28.89%   | 18.88%   | 8.18%    | 9.30%    | 1.76% |
| MSCI EM (Emerging Markets)                | -3.64% | -8.78%  | -8.60%   | 4.98%    | 4.98%    | 38.22%   | 17.48%   | 4.76%    | 9.38%    | 1.78% |
| MSCI EM Asia                              | -4.99% | -9.58%  | -9.59%   | 4.02%    | 4.02%    | 36.76%   | 17.31%   | 3.77%    | 10.06%   | 1.28% |
| MSCI EM Eastern Europe                    | 4.26%  | -6.72%  | -5.53%   | 2.81%    | 2.81%    | 54.47%   | 35.91%   | -10.91%  | 0.25%    | --    |
| MSCI EM Latin America                     | 3.28%  | -4.52%  | -3.18%   | 15.95%   | 15.95%   | 68.78%   | 19.42%   | 14.15%   | 9.61%    | 3.58% |
| Fixed Income                              | 1 Day  | 1 Week  | MTD      | QTD      | YTD      | 1 Year   | 3 Years  | 5 Years  | 10 Years | Yield |
| Bloomberg US Aggregate                    | -0.10% | -0.24%  | -0.61%   | 1.12%    | 1.12%    | 5.63%    | 4.93%    | 0.43%    | 1.94%    | 4.30% |
| Bloomberg Municipal State GO (10 Y)       | -0.04% | -0.75%  | -0.83%   | 1.26%    | 1.26%    | 5.09%    | 3.68%    | 1.42%    | 2.50%    | 2.87% |
| Barclays US High Yield                    | 0.30%  | -0.11%  | 0.05%    | 0.74%    | 0.74%    | 7.38%    | 9.29%    | 4.51%    | 6.43%    | 6.74% |
| Bloomberg Global Aggregate USD            | -0.09% | -0.25%  | -0.62%   | 1.09%    | 1.09%    | 5.69%    | 5.06%    | 0.51%    | 2.05%    | 4.33% |
| Bbg EM Gov't Diversified                  | 0.52%  | -2.03%  | -1.92%   | 0.83%    | 0.83%    | 13.24%   | 7.56%    | 0.78%    | 2.70%    | 6.29% |
| Other                                     | 1 Day  | 1 Week  | MTD      | QTD      | YTD      | 1 Year   | 3 Years  | 5 Years  | 10 Years | Yield |
| FTSE NAREIT                               | 0.18%  | 0.82%   | -0.08%   | 10.04%   | 10.04%   | 7.96%    | 7.91%    | 6.58%    | 6.73%    | 3.66% |
| Alerian MLP                               | 0.39%  | 2.93%   | 1.46%    | 17.37%   | 17.37%   | 17.80%   | 23.56%   | 24.31%   | 11.80%   | 6.61% |
| Bloomberg Commodity                       | -0.11% | 3.22%   | 2.43%    | 14.28%   | 14.28%   | 25.06%   | 9.84%    | 11.73%   | 7.14%    |       |
| US Dollar Index                           | 0.40%  | 1.18%   | 1.22%    | 1.18%    | 1.18%    | -1.93%   | 3.60%    | 5.15%    | 2.63%    |       |
| Interest Rates                            | 3/4/26 | 2/25/26 | 12/31/25 | 12/31/24 | 12/29/23 | 12/30/22 | 12/31/21 | 12/31/20 | 12/31/19 |       |
| US Treasury Constant Maturity - 2 Year    | 3.54%  | 3.45%   | 3.47%    | 4.25%    | 4.23%    | 4.41%    | 0.73%    | 0.13%    | 1.58%    |       |
| US Treasury Constant Maturity - 5 Year    | 3.67%  | 3.61%   | 3.73%    | 4.38%    | 3.84%    | 3.99%    | 1.26%    | 0.36%    | 1.69%    |       |
| US Treasury Constant Maturity - 10 Year   | 4.09%  | 4.05%   | 4.18%    | 4.58%    | 3.88%    | 3.88%    | 1.52%    | 0.93%    | 1.92%    |       |
| Germany Benchmark Bond - 10 Year          | 2.77%  | 2.71%   | 2.86%    | 2.35%    | 2.00%    | 2.53%    | -0.18%   | -0.58%   | -0.19%   |       |
| Japan Benchmark Bond - 10 Year            | 2.11%  | 2.12%   | 2.07%    | 1.10%    | 0.61%    | 0.42%    | 0.07%    | 0.02%    | -0.02%   |       |
| Mexico Benchmark Bond - 10 Year           | 8.88%  | 8.65%   | 9.15%    | 10.41%   | 8.95%    | 9.02%    | 7.56%    | 5.55%    | 6.84%    |       |
| 30 Year Fixed-Rate Mortgages, Average, US | 6.10%  | 6.16%   | 6.25%    | 7.28%    | 6.99%    | 6.66%    | 3.27%    | 2.87%    | 3.72%    |       |
| US Prime Rate                             | 6.75%  | 6.75%   | 6.75%    | 7.50%    | 8.50%    | 7.50%    | 3.25%    | 3.25%    | 4.75%    |       |

## 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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