



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	1.02%	4.17%	5.52%	5.52%	0.94%	29.87%	20.01%	12.29%	14.59%	1.11%
Communications Services	0.78%	6.09%	8.34%	8.34%	0.82%	47.29%	33.30%	13.60%	12.65%	0.61%
Consumer Discretionary	0.85%	5.87%	6.09%	6.09%	-3.66%	22.78%	18.36%	6.09%	12.53%	0.58%
Consumer Staples	-1.04%	-1.26%	-0.46%	-0.46%	7.18%	6.65%	7.96%	8.15%	8.30%	2.17%
Energy	0.33%	-4.50%	-7.07%	-7.07%	28.48%	49.41%	13.14%	23.83%	10.21%	2.69%
Financials	1.73%	3.57%	4.60%	4.60%	-5.17%	12.40%	18.61%	10.07%	12.91%	1.55%
Health Care	0.46%	1.21%	0.97%	0.97%	-3.96%	10.04%	4.74%	6.31%	9.70%	1.71%
Industrials	0.76%	4.97%	6.82%	6.82%	11.75%	39.25%	21.85%	13.23%	13.61%	1.09%
Materials	0.22%	4.11%	4.97%	4.97%	15.19%	31.53%	10.75%	7.56%	10.78%	1.61%
Real Estate	0.52%	3.21%	5.39%	5.39%	8.31%	15.89%	9.15%	4.80%	6.80%	3.21%
Technology	1.72%	6.11%	8.64%	8.64%	-1.28%	44.09%	29.75%	18.36%	23.65%	0.52%
Utilities	-1.19%	0.51%	1.10%	1.10%	9.45%	24.89%	13.50%	10.51%	10.19%	2.59%
DJIA	0.63%	3.33%	4.10%	4.10%	0.78%	21.87%	14.39%	9.49%	12.76%	1.58%
NASDAQ	1.23%	5.40%	7.39%	7.39%	-0.08%	39.32%	24.79%	11.40%	17.34%	0.55%
Russell 3000	1.11%	4.11%	5.49%	5.49%	1.31%	30.53%	19.62%	11.12%	14.14%	1.12%
Russell 1000 Growth	1.36%	4.81%	6.11%	6.11%	-4.26%	29.66%	23.44%	12.57%	17.34%	0.51%
Russell 1000 Value	0.84%	3.29%	4.65%	4.65%	6.85%	29.32%	15.47%	9.95%	10.90%	1.73%
Russell Midcap	1.33%	3.26%	4.85%	4.85%	6.21%	29.61%	15.10%	7.54%	11.30%	1.45%
Russell 2500	1.62%	5.09%	7.14%	7.14%	9.32%	42.22%	15.98%	6.49%	11.16%	1.25%
Russell 2000	1.52%	5.12%	7.00%	7.00%	7.95%	45.24%	15.69%	5.08%	10.43%	1.09%
MSCI AC World	0.50%	4.29%	6.31%	6.31%	3.01%	33.79%	18.93%	10.56%	12.39%	1.53%
MSCI AC World ex USA	-0.42%	4.58%	7.74%	7.74%	7.09%	41.04%	17.09%	8.73%	9.57%	2.22%
MSCI EAFE	-0.41%	4.07%	7.01%	7.01%	5.81%	35.89%	15.75%	9.36%	9.50%	2.49%
MSCI Europe	-0.26%	4.46%	7.15%	7.15%	4.28%	33.83%	15.30%	10.32%	9.76%	2.71%
MSCI Japan	-0.76%	2.55%	6.42%	6.42%	8.03%	39.63%	18.22%	7.93%	9.34%	1.82%
MSCI EM (Emerging Markets)	-0.74%	5.98%	10.03%	10.03%	9.92%	50.64%	18.80%	6.03%	9.15%	1.78%
MSCI EM Asia	-0.94%	6.10%	10.59%	10.59%	8.98%	50.55%	18.92%	5.27%	9.96%	1.48%
MSCI EM Eastern Europe	2.09%	10.62%	14.77%	14.77%	15.43%	63.80%	38.84%	-8.73%	0.31%	--
MSCI EM Latin America	0.12%	6.38%	8.04%	8.04%	23.88%	77.67%	20.24%	14.86%	9.39%	3.29%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.19%	0.39%	0.53%	0.53%	0.48%	6.66%	3.64%	0.27%	1.72%	4.51%
Bloomberg Municipal State GO (10 Y)	0.01%	0.70%	1.11%	1.11%	0.19%	8.18%	2.21%	1.01%	2.17%	3.17%
Bardays US High Yield	0.08%	0.72%	1.38%	1.38%	0.88%	11.11%	8.74%	4.38%	6.07%	6.97%
Bloomberg Global Aggregate USD	0.19%	0.41%	0.55%	0.55%	0.45%	6.74%	3.79%	0.35%	1.82%	4.55%
Bbg EM Gov't Diversified	-0.11%	2.47%	3.97%	3.97%	0.81%	12.35%	6.23%	1.07%	2.11%	6.59%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.31%	3.45%	5.46%	5.46%	9.12%	18.02%	9.11%	4.16%	6.06%	3.79%
Alerian MLP	-0.77%	-0.32%	-0.67%	-0.67%	16.07%	28.89%	23.64%	24.23%	11.03%	6.38%
Bloomberg Commodity	1.25%	-2.95%	-0.98%	-0.98%	23.20%	37.00%	12.63%	13.54%	7.56%	
US Dollar Index	-0.25%	-1.58%	-1.51%	-1.51%	1.18%	3.04%	4.60%	5.12%	2.92%	
Interest Rates	4/13/26	4/6/26	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	3.78%	3.84%	3.47%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	
US Treasury Constant Maturity - 5 Year	3.92%	3.98%	3.73%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	
US Treasury Constant Maturity - 10 Year	4.30%	4.34%	4.18%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	
Germany Benchmark Bond - 10 Year	3.08%	3.00%	2.86%	2.35%	2.00%	2.53%	-0.18%	-0.58%	-0.19%	
Japan Benchmark Bond - 10 Year	2.46%	2.40%	2.07%	1.10%	0.61%	0.42%	0.07%	0.02%	-0.02%	
Mexico Benchmark Bond - 10 Year	9.02%	9.23%	9.15%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	
30 Year Fixed-Rate Mortgages, Average, US	6.51%	6.52%	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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