



| Equities                                  | 1 Day  | 1 Week  | MTD      | QTD      | YTD      | 1 Year   | 3 Years  | 5 Years  | 10 Years | Yield |
|---|--------|---------|----------|----------|----------|----------|----------|----------|----------|-------|
| S&P 500                                   | 1.46%  | 3.23%   | 2.18%    | 12.90%   | 8.00%    | 32.84%   | 22.79%   | 13.47%   | 15.50%   | 1.04% |
| Communications Services                   | 2.05%  | 5.80%   | 1.75%    | 20.62%   | 12.25%   | 53.30%   | 38.74%   | 15.54%   | 13.84%   | 0.55% |
| Consumer Discretionary                    | 1.37%  | 3.24%   | 1.97%    | 13.94%   | 3.47%    | 27.58%   | 20.96%   | 8.01%    | 13.33%   | 0.54% |
| Consumer Staples                          | 0.08%  | 1.48%   | -0.21%   | 2.88%    | 10.78%   | 8.36%    | 8.46%    | 8.30%    | 8.60%    | 2.10% |
| Energy                                    | -4.06% | -3.53%  | -4.32%   | -7.63%   | 27.70%   | 45.82%   | 15.93%   | 21.33%   | 9.95%    | 2.71% |
| Financials                                | 0.50%  | -0.14%  | -0.56%   | 4.97%    | -4.84%   | 7.09%    | 19.00%   | 8.58%    | 12.85%   | 1.55% |
| Health Care                               | 0.08%  | 1.85%   | -0.35%   | -0.79%   | -5.64%   | 10.29%   | 4.65%    | 5.13%    | 9.64%    | 1.74% |
| Industrials                               | 2.60%  | 4.13%   | 1.33%    | 9.37%    | 14.41%   | 34.28%   | 22.95%   | 12.91%   | 13.97%   | 1.07% |
| Materials                                 | 1.88%  | 2.71%   | 1.64%    | 4.38%    | 14.54%   | 25.98%   | 11.36%   | 5.69%    | 10.68%   | 1.62% |
| Real Estate                               | 1.35%  | 2.44%   | 0.63%    | 9.44%    | 12.47%   | 12.66%   | 10.30%   | 5.07%    | 7.01%    | 3.08% |
| Technology                                | 2.56%  | 4.88%   | 5.54%    | 23.98%   | 12.66%   | 54.27%   | 34.61%   | 22.32%   | 26.04%   | 0.45% |
| Utilities                                 | -1.45% | 0.10%   | -2.40%   | -0.36%   | 7.86%    | 16.75%   | 13.26%   | 10.12%   | 9.99%    | 2.62% |
| DJIA                                      | 1.24%  | 2.15%   | 0.52%    | 7.79%    | 4.35%    | 24.22%   | 16.08%   | 9.68%    | 13.24%   | 1.55% |
| NASDAQ                                    | 2.02%  | 4.74%   | 3.81%    | 19.71%   | 11.38%   | 46.77%   | 29.08%   | 14.43%   | 19.13%   | 0.50% |
| Russell 3000                              | 1.44%  | 3.32%   | 2.16%    | 12.59%   | 8.13%    | 32.67%   | 22.39%   | 12.35%   | 15.01%   | 1.05% |
| Russell 1000 Growth                       | 1.73%  | 3.13%   | 2.71%    | 14.93%   | 3.70%    | 32.57%   | 26.36%   | 14.79%   | 18.52%   | 0.48% |
| Russell 1000 Value                        | 1.09%  | 3.34%   | 1.45%    | 9.72%    | 12.03%   | 30.55%   | 17.91%   | 10.15%   | 11.44%   | 1.66% |
| Russell Midcap                            | 1.01%  | 3.58%   | 1.68%    | 9.14%    | 10.55%   | 26.55%   | 17.29%   | 8.16%    | 11.80%   | 1.39% |
| Russell 2500                              | 1.55%  | 5.24%   | 2.99%    | 14.48%   | 16.81%   | 42.19%   | 19.29%   | 7.69%    | 11.99%   | 1.19% |
| Russell 2000                              | 1.47%  | 5.39%   | 3.11%    | 15.70%   | 16.72%   | 47.23%   | 19.51%   | 6.61%    | 11.44%   | 1.03% |
| MSCI AC World                             | 1.83%  | 3.46%   | 2.53%    | 13.00%   | 9.49%    | 33.33%   | 21.42%   | 11.62%   | 13.25%   | 1.43% |
| MSCI AC World ex USA                      | 2.42%  | 3.79%   | 3.12%    | 13.15%   | 12.47%   | 34.65%   | 19.01%   | 9.40%    | 10.32%   | 2.12% |
| MSCI EAFE                                 | 2.23%  | 3.31%   | 1.91%    | 9.61%    | 8.39%    | 25.59%   | 16.47%   | 9.47%    | 9.89%    | 2.42% |
| MSCI Europe                               | 2.75%  | 4.10%   | 2.32%    | 9.75%    | 6.80%    | 23.69%   | 15.97%   | 10.20%   | 10.18%   | 2.58% |
| MSCI Japan                                | 0.89%  | 1.24%   | 0.36%    | 9.55%    | 11.21%   | 30.17%   | 18.74%   | 8.83%    | 9.69%    | 1.76% |
| MSCI EM (Emerging Markets)                | 3.10%  | 5.05%   | 6.24%    | 21.89%   | 21.76%   | 53.00%   | 23.43%   | 7.91%    | 10.77%   | 1.62% |
| MSCI EM Asia                              | 3.26%  | 5.50%   | 7.05%    | 25.79%   | 23.97%   | 56.57%   | 24.75%   | 7.89%    | 11.91%   | 1.33% |
| MSCI EM Eastern Europe                    | 3.00%  | 4.46%   | 4.55%    | 15.71%   | 16.36%   | 50.74%   | 36.91%   | -9.83%   | 0.78%    | --    |
| MSCI EM Latin America                     | 1.53%  | 3.54%   | 2.07%    | 5.32%    | 20.77%   | 56.24%   | 19.68%   | 12.97%   | 9.38%    | 3.48% |
| Fixed Income                              | 1 Day  | 1 Week  | MTD      | QTD      | YTD      | 1 Year   | 3 Years  | 5 Years  | 10 Years | Yield |
| Bloomberg US Aggregate                    | 0.42%  | 0.52%   | 0.41%    | 0.52%    | 0.47%    | 5.20%    | 3.61%    | 0.24%    | 1.69%    | 4.58% |
| Bloomberg Municipal State GO (10 Y)       | 0.14%  | 0.15%   | 0.13%    | 1.15%    | 0.24%    | 6.31%    | 2.53%    | 1.01%    | 2.20%    | 3.22% |
| Barclays US High Yield                    | 0.27%  | 0.42%   | 0.29%    | 1.99%    | 1.49%    | 8.75%    | 9.06%    | 4.35%    | 5.76%    | 6.90% |
| Bloomberg Global Aggregate USD            | 0.42%  | 0.51%   | 0.40%    | 0.57%    | 0.47%    | 5.30%    | 3.76%    | 0.32%    | 1.79%    | 4.61% |
| Bbg EM Gov't Diversified                  | 1.03%  | 0.82%   | 0.94%    | 3.99%    | 0.83%    | 8.86%    | 6.28%    | 0.88%    | 2.14%    | 6.70% |
| Other                                     | 1 Day  | 1 Week  | MTD      | QTD      | YTD      | 1 Year   | 3 Years  | 5 Years  | 10 Years | Yield |
| FTSE NAREIT                               | 1.31%  | 2.34%   | 0.69%    | 9.73%    | 13.54%   | 15.35%   | 10.36%   | 4.49%    | 6.20%    | 3.64% |
| Alerian MLP                               | -2.38% | -0.85%  | -2.53%   | 1.80%    | 18.96%   | 30.13%   | 25.44%   | 22.65%   | 10.35%   | 6.32% |
| Bloomberg Commodity                       | -2.33% | -1.62%  | -1.87%   | 2.26%    | 27.22%   | 39.93%   | 15.42%   | 12.09%   | 7.62%    |       |
| US Dollar Index                           | -0.36% | -0.91%  | 0.00%    | -1.62%   | 1.07%    | 3.53%    | 4.37%    | 5.32%    | 3.01%    |       |
| Interest Rates                            | 5/6/26 | 4/29/26 | 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    | 3.87%  | 3.92%   | 3.47%    | 4.25%    | 4.23%    | 4.41%    | 0.73%    | 0.13%    | 1.58%    |       |
| US Treasury Constant Maturity - 5 Year    | 3.99%  | 4.05%   | 3.73%    | 4.38%    | 3.84%    | 3.99%    | 1.26%    | 0.36%    | 1.69%    |       |
| US Treasury Constant Maturity - 10 Year   | 4.36%  | 4.42%   | 4.18%    | 4.58%    | 3.88%    | 3.88%    | 1.52%    | 0.93%    | 1.92%    |       |
| Germany Benchmark Bond - 10 Year          | 3.00%  | 3.09%   | 2.86%    | 2.35%    | 2.00%    | 2.53%    | -0.18%   | -0.58%   | -0.19%   |       |
| Japan Benchmark Bond - 10 Year            | 2.50%  | 2.46%   | 2.07%    | 1.10%    | 0.61%    | 0.42%    | 0.07%    | 0.02%    | -0.02%   |       |
| Mexico Benchmark Bond - 10 Year           | 9.19%  | 9.22%   | 9.15%    | 10.41%   | 8.95%    | 9.02%    | 7.56%    | 5.55%    | 6.84%    |       |
| 30 Year Fixed-Rate Mortgages, Average, US | 6.40%  | 6.35%   | 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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