



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	1.17%	-3.10%	-3.10%	0.46%	15.82%	24.43%	8.43%	14.71%	12.66%	1.28%
Communications Services	0.09%	-4.95%	-4.95%	-7.63%	17.01%	26.21%	0.91%	11.98%	8.90%	0.74%
Consumer Discretionary	1.63%	-1.23%	-1.23%	-0.56%	5.07%	12.18%	1.11%	9.79%	11.88%	0.70%
Consumer Staples	0.82%	1.47%	1.47%	9.57%	19.40%	21.86%	9.00%	10.27%	9.75%	2.21%
Energy	0.77%	-4.87%	-4.87%	-4.51%	5.92%	-2.30%	27.40%	13.13%	3.30%	3.41%
Financials	1.42%	-1.78%	-1.78%	9.29%	20.40%	33.17%	7.95%	12.31%	11.29%	1.53%
Health Care	0.74%	-1.40%	-1.40%	6.38%	14.68%	19.34%	6.61%	13.40%	11.15%	1.48%
Industrials	1.57%	-2.81%	-2.81%	4.87%	13.00%	22.95%	9.47%	12.51%	10.87%	1.35%
Materials	0.99%	-3.76%	-3.76%	2.87%	7.03%	13.23%	4.79%	12.11%	8.33%	1.86%
Real Estate	1.21%	1.40%	1.40%	15.01%	12.20%	24.91%	1.04%	5.84%	8.04%	3.06%
Technology	1.42%	-5.73%	-5.73%	-6.54%	19.85%	33.46%	14.43%	24.50%	21.28%	0.66%
Utilities	1.01%	0.50%	0.50%	12.54%	23.16%	25.58%	6.73%	7.62%	9.63%	2.91%
DJIA	1.20%	-1.73%	-1.73%	4.79%	9.81%	20.29%	7.54%	10.99%	11.60%	1.80%
NASDAQ	1.17%	-4.65%	-4.65%	-4.65%	13.06%	23.53%	4.27%	16.73%	14.47%	0.62%
Russell 3000	1.10%	-3.29%	-3.29%	0.65%	14.29%	23.29%	6.87%	13.97%	12.02%	1.28%
Russell 1000 Growth	1.24%	-4.22%	-4.22%	-3.89%	16.00%	26.65%	7.35%	17.82%	15.55%	0.57%
Russell 1000 Value	1.02%	-2.07%	-2.07%	5.70%	12.70%	19.62%	6.86%	10.04%	8.67%	2.01%
Russell Midcap	0.90%	-2.83%	-2.83%	3.81%	8.96%	18.58%	2.75%	10.17%	9.30%	1.57%
Russell 2500	0.47%	-4.53%	-4.53%	2.30%	4.71%	14.69%	0.56%	9.05%	8.34%	1.43%
Russell 2000	0.31%	-5.38%	-5.38%	2.68%	4.45%	14.92%	-0.88%	8.02%	7.55%	1.38%
MSCI AC World	0.61%	-3.04%	-3.11%	1.01%	12.71%	21.44%	5.20%	11.47%	9.03%	1.77%
MSCI AC World ex USA	-0.40%	-2.82%	-3.03%	2.09%	8.26%	16.69%	1.44%	6.89%	4.66%	2.60%
MSCI EAFE	-0.26%	-2.90%	-3.08%	3.03%	8.96%	18.13%	3.28%	7.94%	5.45%	2.76%
MSCI Europe	0.12%	-2.99%	-3.03%	2.99%	9.54%	19.12%	4.58%	8.86%	5.55%	2.91%
MSCI Japan	-1.04%	-2.98%	-3.71%	2.40%	9.01%	15.91%	1.06%	7.28%	6.35%	1.86%
MSCI EM (Emerging Markets)	-1.05%	-2.95%	-3.26%	-1.31%	6.27%	12.40%	-3.53%	3.91%	2.59%	2.23%
MSCI EM Asia	-1.19%	-3.19%	-3.61%	-2.20%	8.78%	13.38%	-3.85%	5.01%	4.09%	1.83%
MSCI EM Eastern Europe	-0.40%	-4.44%	-3.02%	-3.08%	5.79%	32.24%	-35.61%	-19.40%	-8.37%	#N/A
MSCI EM Latin America	0.25%	-1.65%	-1.83%	1.83%	-13.94%	1.59%	4.98%	2.08%	-0.24%	4.63%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.14%	1.36%	1.44%	5.30%	4.55%	9.64%	-1.68%	0.34%	1.84%	4.20%
Bloomberg Municipal State GO (10 Y)	0.03%	0.55%	0.55%	2.17%	0.37%	4.75%	-0.27%	1.19%	2.37%	2.99%
Barclays US High Yield	0.12%	0.37%	0.37%	3.99%	6.67%	13.25%	2.58%	4.44%	4.74%	7.22%
Bloomberg Global Aggregate USD	0.13%	1.32%	1.39%	5.22%	4.64%	9.74%	-1.64%	0.43%	1.92%	4.25%
Bbg EM Gov't Diversified	-0.65%	0.10%	-0.20%	5.39%	1.40%	8.38%	-2.48%	-0.76%	-0.18%	6.23%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.90%	0.81%	0.81%	13.93%	11.42%	23.26%	0.66%	4.55%	6.88%	3.54%
Alerian MLP	-0.05%	-2.36%	-2.36%	-1.38%	16.09%	25.52%	25.19%	12.94%	1.69%	6.63%
Bloomberg Commodity	0.58%	-1.80%	-1.80%	-5.72%	-0.87%	-6.25%	2.86%	6.20%	-1.02%	
US Dollar Index	0.39%	0.00%	0.00%	-2.95%	4.43%	2.57%	6.89%	2.97%	3.38%	
Interest Rates	9/9/24	9/2/24	12/29/23	12/30/22	12/31/21	12/31/20	12/31/19	12/31/18	12/29/17	
US Treasury Constant Maturity - 2 Year	3.68%	3.91%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	1.89%	
US Treasury Constant Maturity - 5 Year	3.49%	3.71%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	2.20%	
US Treasury Constant Maturity - 10 Year	3.70%	3.91%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	2.40%	
Germany Benchmark Bond - 10 Year	2.18%	2.28%	2.00%	2.49%	-0.19%	-0.58%	-0.19%	0.24%	0.47%	
Japan Benchmark Bond - 10 Year	0.89%	0.90%	0.61%	0.45%	0.07%	0.02%	-0.02%	0.01%	0.05%	
Mexico Benchmark Bond - 10 Year	9.47%	9.63%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	7.64%	
30 Year Fixed-Rate Mortgages, Average, US	6.69%	6.80%	6.99%	6.66%	3.27%	2.87%	3.86%	4.51%	3.95%	
US Prime Rate	8.50%	8.50%	8.50%	7.50%	3.25%	3.25%	4.75%	5.50%	4.50%	

## 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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