



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.15%	3.01%	-0.19%	3.48%	19.30%	28.32%	9.65%	15.23%	12.92%	1.25%
Communications Services	0.92%	5.19%	-0.02%	-2.84%	23.08%	32.00%	2.91%	13.00%	9.41%	0.72%
Consumer Discretionary	-0.32%	4.11%	2.84%	3.53%	9.39%	14.81%	2.36%	10.94%	12.31%	0.67%
Consumer Staples	0.35%	0.70%	2.18%	10.34%	20.24%	22.09%	9.46%	10.74%	9.71%	2.20%
Energy	1.21%	-0.25%	-5.11%	-4.75%	5.66%	-2.69%	25.61%	12.00%	3.25%	3.38%
Financials	1.23%	0.34%	-1.45%	9.65%	20.80%	31.68%	8.15%	11.97%	11.21%	1.54%
Health Care	0.66%	1.39%	-0.03%	7.86%	16.28%	20.87%	7.51%	13.49%	11.22%	1.46%
Industrials	0.53%	2.68%	-0.20%	7.68%	16.03%	26.98%	10.80%	12.56%	11.12%	1.34%
Materials	0.92%	3.09%	-0.78%	6.05%	10.34%	16.84%	6.28%	12.29%	8.65%	1.80%
Real Estate	0.34%	2.72%	4.16%	18.14%	15.25%	27.74%	2.06%	6.67%	8.74%	2.99%
Technology	-0.95%	4.82%	-1.19%	-2.04%	25.63%	43.04%	16.29%	25.65%	21.78%	0.63%
Utilities	0.75%	3.20%	3.72%	16.14%	27.11%	26.15%	8.90%	8.13%	9.96%	2.82%
DJIA	0.60%	2.01%	0.24%	6.90%	12.02%	22.52%	8.37%	11.23%	11.74%	1.77%
NASDAQ	-0.51%	4.21%	-0.64%	-0.63%	17.82%	29.18%	5.86%	17.50%	14.94%	0.64%
Russell 3000	0.20%	3.16%	-0.24%	3.83%	17.90%	27.36%	8.13%	14.45%	12.33%	1.25%
Russell 1000 Growth	-0.34%	4.39%	-0.02%	0.33%	21.09%	33.10%	8.99%	18.81%	16.01%	0.55%
Russell 1000 Value	0.78%	1.73%	-0.38%	7.53%	14.65%	21.11%	7.66%	10.09%	8.79%	1.99%
Russell Midcap	0.71%	2.97%	0.05%	6.89%	12.20%	22.52%	3.88%	10.53%	9.64%	1.52%
Russell 2500	0.58%	3.93%	-0.78%	6.32%	8.82%	19.56%	2.04%	9.34%	8.79%	1.38%
Russell 2000	0.32%	4.41%	-1.21%	7.20%	9.06%	20.20%	0.78%	8.10%	8.08%	1.32%
MSCI AC World	0.20%	2.66%	-0.54%	3.70%	15.70%	24.00%	6.32%	11.84%	9.35%	1.72%
MSCI AC World ex USA	0.26%	1.90%	-1.19%	4.03%	10.31%	16.89%	2.34%	7.03%	4.98%	2.61%
MSCI EAFE	0.18%	1.66%	-1.47%	4.74%	10.76%	18.12%	3.97%	8.07%	5.70%	2.77%
MSCI Europe	0.15%	1.58%	-1.50%	4.62%	11.27%	19.62%	5.40%	9.13%	5.75%	2.92%
MSCI Japan	0.15%	1.39%	-2.37%	3.82%	10.52%	14.06%	1.08%	6.95%	6.49%	1.86%
MSCI EM (Emerging Markets)	0.36%	2.24%	-1.10%	0.90%	8.65%	13.47%	-2.26%	4.02%	3.13%	2.19%
MSCI EM Asia	0.37%	2.43%	-1.27%	0.17%	11.42%	14.75%	-2.40%	5.22%	4.72%	1.76%
MSCI EM Eastern Europe	-0.50%	0.27%	-2.75%	-2.82%	6.08%	31.31%	-35.83%	-19.89%	-8.12%	#N/A
MSCI EM Latin America	0.59%	2.96%	1.08%	4.84%	-11.39%	0.63%	6.14%	2.40%	0.21%	4.66%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.30%	0.67%	2.12%	6.00%	5.25%	10.73%	-1.44%	0.68%	1.95%	4.10%
Bloomberg Municipal State GO (10 Y)	0.03%	0.16%	0.70%	2.33%	0.53%	5.10%	-0.23%	1.46%	2.37%	2.97%
Barclays US High Yield	0.27%	0.55%	0.92%	4.56%	7.26%	13.65%	2.70%	4.49%	4.86%	7.13%
Bloomberg Global Aggregate USD	0.30%	0.66%	2.06%	5.92%	5.33%	10.80%	-1.40%	0.76%	2.02%	4.15%
Bbg EM Gov't Diversified	0.10%	1.46%	1.26%	6.93%	2.88%	9.69%	-1.91%	-0.51%	0.08%	6.21%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.38%	3.13%	3.96%	17.49%	14.91%	25.98%	1.86%	5.29%	7.60%	3.44%
Alerian MLP	0.88%	3.41%	0.96%	1.99%	20.05%	28.60%	26.26%	13.02%	1.69%	6.45%
Bloomberg Commodity	0.62%	2.77%	0.92%	-3.10%	1.88%	-5.00%	3.09%	5.99%	-0.65%	
US Dollar Index	-0.35%	-0.64%	-0.64%	-3.57%	3.77%	1.57%	6.50%	2.76%	3.34%	
Interest Rates	9/16/24	9/9/24	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	3.56%	3.68%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	1.89%	
US Treasury Constant Maturity - 5 Year	3.41%	3.49%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	2.20%	
US Treasury Constant Maturity - 10 Year	3.63%	3.70%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	2.40%	
Germany Benchmark Bond - 10 Year	2.13%	2.18%	2.00%	2.49%	-0.19%	-0.58%	-0.19%	0.24%	0.47%	
Japan Benchmark Bond - 10 Year	0.84%	0.89%	0.61%	0.45%	0.07%	0.02%	-0.02%	0.01%	0.05%	
Mexico Benchmark Bond - 10 Year	9.25%	9.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	7.64%	
30 Year Fixed-Rate Mortgages, Average, US	6.59%	6.69%	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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