



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.03%	2.57%	-0.16%	3.51%	19.34%	28.23%	10.00%	15.18%	12.91%	1.25%
Communications Services	0.40%	5.50%	0.38%	-2.45%	23.58%	32.39%	3.49%	13.03%	9.41%	0.72%
Consumer Discretionary	0.62%	3.32%	3.47%	4.17%	10.06%	15.45%	2.70%	10.94%	12.38%	0.66%
Consumer Staples	-0.93%	-0.24%	1.23%	9.31%	19.12%	20.87%	9.31%	10.42%	9.62%	2.22%
Energy	1.41%	3.13%	-3.77%	-3.41%	7.15%	-1.32%	26.51%	12.66%	3.44%	3.34%
Financials	0.52%	1.84%	-0.94%	10.22%	21.43%	32.22%	8.51%	12.06%	11.21%	1.53%
Health Care	-1.01%	-0.09%	-1.04%	6.77%	15.10%	19.57%	7.12%	13.23%	11.10%	1.48%
Industrials	0.52%	3.03%	0.32%	8.24%	16.63%	27.52%	11.38%	12.69%	11.13%	1.33%
Materials	0.17%	3.20%	-0.61%	6.24%	10.54%	16.98%	7.08%	12.17%	8.61%	1.80%
Real Estate	-0.84%	0.09%	3.29%	17.15%	14.28%	26.55%	2.09%	6.20%	8.64%	3.01%
Technology	-0.09%	3.45%	-1.28%	-2.12%	25.52%	42.72%	16.85%	25.54%	21.75%	0.63%
Utilities	-0.08%	2.65%	3.63%	16.05%	27.00%	25.93%	9.44%	7.92%	9.97%	2.82%
DJIA	-0.04%	2.19%	0.21%	6.86%	11.98%	22.38%	8.53%	11.19%	11.72%	1.76%
NASDAQ	0.21%	3.56%	-0.43%	-0.43%	18.06%	29.32%	6.25%	17.45%	14.94%	0.64%
Russell 3000	0.09%	2.84%	-0.15%	3.92%	18.01%	27.36%	8.44%	14.43%	12.32%	1.24%
Russell 1000 Growth	0.10%	3.50%	0.08%	0.43%	21.22%	33.09%	9.43%	18.71%	16.01%	0.55%
Russell 1000 Value	0.01%	1.90%	-0.37%	7.54%	14.66%	21.04%	7.86%	10.10%	8.78%	1.99%
Russell Midcap	0.29%	3.31%	0.34%	7.20%	12.52%	22.78%	4.23%	10.55%	9.66%	1.52%
Russell 2500	0.55%	4.64%	-0.23%	6.91%	9.42%	20.14%	2.30%	9.49%	8.84%	1.38%
Russell 2000	0.75%	5.20%	-0.47%	8.00%	9.87%	21.01%	0.97%	8.35%	8.13%	1.31%
MSCI AC World	0.04%	2.55%	-0.50%	3.74%	15.75%	23.94%	6.59%	11.82%	9.33%	1.72%
MSCI AC World ex USA	0.06%	2.38%	-1.13%	4.09%	10.38%	16.89%	2.53%	7.05%	4.95%	2.60%
MSCI EAFE	-0.08%	2.17%	-1.55%	4.66%	10.68%	17.95%	4.20%	8.00%	5.67%	2.76%
MSCI Europe	0.37%	2.78%	-1.13%	5.00%	11.67%	19.98%	5.93%	9.12%	5.73%	2.91%
MSCI Japan	-1.75%	-0.12%	-4.07%	2.01%	8.59%	12.02%	0.43%	6.56%	6.38%	1.86%
MSCI EM (Emerging Markets)	0.42%	2.70%	-0.69%	1.32%	9.10%	13.89%	-2.19%	4.27%	3.09%	2.18%
MSCI EM Asia	0.38%	2.78%	-0.90%	0.55%	11.85%	15.12%	-2.46%	5.47%	4.64%	1.76%
MSCI EM Eastern Europe	1.40%	2.94%	-1.39%	-1.46%	7.56%	32.99%	-35.36%	-19.50%	-7.96%	#N/A
MSCI EM Latin America	0.15%	4.15%	1.23%	5.00%	-11.25%	0.78%	7.10%	2.34%	0.20%	4.55%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.16%	0.18%	1.95%	5.84%	5.08%	10.52%	-1.45%	0.62%	1.94%	4.13%
Bloomberg Municipal State GO (10 Y)	0.12%	0.19%	0.82%	2.44%	0.65%	5.20%	-0.18%	1.52%	2.37%	2.93%
Barclays US High Yield	0.16%	0.75%	1.08%	4.73%	7.43%	13.78%	2.76%	4.52%	4.87%	7.08%
Bloomberg Global Aggregate USD	-0.14%	0.19%	1.92%	5.77%	5.17%	10.60%	-1.40%	0.71%	2.02%	4.18%
Bbg EM Gov't Diversified	0.07%	1.64%	1.33%	7.00%	2.95%	9.73%	-1.75%	-0.44%	0.06%	6.21%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.67%	0.91%	3.26%	16.70%	14.13%	25.03%	1.94%	4.93%	7.53%	3.46%
Alerian MLP	-0.06%	2.64%	0.90%	1.93%	19.97%	28.40%	26.91%	12.99%	1.69%	6.46%
Bloomberg Commodity	0.30%	4.06%	1.23%	-2.81%	2.19%	-4.70%	3.56%	6.45%	-0.60%	
US Dollar Index	-0.21%	-0.60%	-0.50%	-3.43%	3.91%	1.71%	6.46%	2.86%	3.32%	
Interest Rates	9/17/24	9/10/24	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	3.59%	3.59%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	1.89%	
US Treasury Constant Maturity - 5 Year	3.44%	3.43%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	2.20%	
US Treasury Constant Maturity - 10 Year	3.65%	3.65%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	2.40%	
Germany Benchmark Bond - 10 Year	2.14%	2.16%	2.00%	2.49%	-0.19%	-0.58%	-0.19%	0.24%	0.47%	
Japan Benchmark Bond - 10 Year	0.83%	0.89%	0.61%	0.45%	0.07%	0.02%	-0.02%	0.01%	0.05%	
Mexico Benchmark Bond - 10 Year	9.25%	9.50%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	7.64%	
30 Year Fixed-Rate Mortgages, Average, US	6.58%	6.66%	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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