



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	1.70%	2.15%	1.25%	4.97%	21.02%	30.21%	10.48%	15.49%	13.02%	1.23%
Communications Services	1.88%	4.32%	2.30%	-0.59%	25.94%	34.53%	4.13%	13.46%	9.43%	0.71%
Consumer Discretionary	2.20%	2.84%	5.55%	6.26%	12.27%	19.70%	3.37%	11.44%	12.54%	0.65%
Consumer Staples	-0.58%	-0.93%	0.20%	8.20%	17.91%	19.85%	8.92%	10.19%	9.46%	2.25%
Energy	1.22%	4.64%	-2.36%	-1.99%	8.73%	0.28%	27.05%	13.17%	3.64%	3.29%
Financials	1.17%	3.03%	-0.05%	11.20%	22.51%	33.12%	8.81%	12.25%	11.24%	1.52%
Health Care	0.35%	0.04%	-0.86%	6.97%	15.32%	19.89%	7.17%	13.16%	11.02%	1.48%
Industrials	1.75%	3.77%	1.99%	10.04%	18.57%	30.07%	11.96%	13.20%	11.27%	1.31%
Materials	1.49%	3.12%	0.48%	7.40%	11.75%	18.85%	7.45%	12.36%	8.66%	1.78%
Real Estate	-0.23%	-0.28%	2.78%	16.58%	13.72%	27.67%	1.92%	6.10%	8.65%	3.03%
Technology	3.10%	1.93%	1.27%	0.40%	28.75%	45.80%	17.79%	26.10%	22.02%	0.61%
Utilities	-0.57%	0.75%	2.25%	14.50%	25.30%	25.00%	8.93%	7.44%	9.81%	2.86%
DJIA	1.26%	2.32%	1.22%	7.94%	13.11%	23.97%	8.87%	11.43%	11.75%	1.77%
NASDAQ	2.52%	2.56%	1.76%	1.76%	20.65%	32.43%	7.01%	17.97%	15.14%	0.64%
Russell 3000	1.74%	2.52%	1.34%	5.47%	19.77%	29.56%	8.96%	14.78%	12.46%	1.23%
Russell 1000 Growth	2.37%	2.28%	2.12%	2.47%	23.69%	35.92%	10.13%	19.14%	16.19%	0.54%
Russell 1000 Value	1.01%	2.45%	0.47%	8.44%	15.63%	22.41%	8.14%	10.32%	8.83%	1.97%
Russell Midcap	1.33%	3.43%	1.54%	8.48%	13.87%	24.84%	4.63%	10.90%	9.79%	1.50%
Russell 2500	1.87%	5.13%	1.70%	8.97%	11.53%	23.35%	2.95%	10.06%	9.09%	1.35%
Russell 2000	2.10%	5.83%	1.66%	10.32%	12.23%	24.95%	1.68%	9.04%	8.43%	1.28%
MSCI AC World	1.60%	2.22%	0.80%	5.09%	17.26%	26.06%	7.03%	12.09%	9.46%	1.72%
MSCI AC World ex USA	1.38%	2.22%	-0.09%	5.19%	11.54%	19.05%	2.88%	7.23%	5.06%	2.60%
MSCI EAFE	1.49%	2.21%	-0.42%	5.86%	11.94%	20.05%	4.58%	8.17%	5.76%	2.75%
MSCI Europe	1.49%	2.61%	-0.25%	5.94%	12.67%	22.12%	6.23%	9.16%	5.79%	2.91%
MSCI Japan	1.61%	0.59%	-2.39%	3.79%	10.49%	13.85%	1.01%	6.90%	6.47%	1.89%
MSCI EM (Emerging Markets)	1.15%	2.32%	0.20%	2.23%	10.08%	16.12%	-1.90%	4.50%	3.26%	2.18%
MSCI EM Asia	1.20%	2.07%	-0.06%	1.41%	12.79%	17.55%	-2.18%	5.67%	4.77%	1.76%
MSCI EM Eastern Europe	0.85%	3.76%	-0.72%	-0.79%	8.29%	36.47%	-35.15%	-19.37%	-7.78%	#N/A
MSCI EM Latin America	0.29%	3.34%	1.62%	5.40%	-10.91%	0.90%	7.22%	2.63%	0.46%	4.53%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.04%	0.05%	1.66%	5.53%	4.78%	10.36%	-1.54%	0.50%	1.90%	4.16%
Bloomberg Municipal State GO (10 Y)	-0.01%	0.17%	0.84%	2.46%	0.66%	5.47%	-0.17%	1.46%	2.37%	2.93%
Barclays US High Yield	0.33%	1.07%	1.51%	5.17%	7.89%	14.50%	2.89%	4.61%	4.89%	6.96%
Bloomberg Global Aggregate USD	0.04%	0.07%	1.63%	5.47%	4.88%	10.46%	-1.49%	0.59%	1.97%	4.21%
Bbg EM Gov't Diversified	0.31%	1.65%	1.93%	7.64%	3.56%	10.59%	-1.55%	-0.35%	0.18%	6.18%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.12%	0.31%	2.91%	16.30%	13.74%	26.38%	1.82%	4.84%	7.57%	3.47%
Alerian MLP	-0.46%	0.56%	0.02%	1.03%	18.92%	25.46%	26.46%	12.82%	1.69%	6.51%
Bloomberg Commodity	0.77%	2.40%	2.12%	-1.95%	3.09%	-3.91%	3.85%	6.77%	-0.30%	
US Dollar Index	-0.18%	-0.57%	-0.67%	-3.60%	3.73%	1.67%	6.38%	2.82%	3.26%	
Interest Rates	9/19/24	9/12/24	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%	3.64%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	1.89%	
US Treasury Constant Maturity - 5 Year	3.49%	3.47%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	2.20%	
US Treasury Constant Maturity - 10 Year	3.73%	3.68%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	2.40%	
Germany Benchmark Bond - 10 Year	2.19%	2.15%	2.00%	2.49%	-0.19%	-0.58%	-0.19%	0.24%	0.47%	
Japan Benchmark Bond - 10 Year	0.85%	0.86%	0.61%	0.45%	0.07%	0.02%	-0.02%	0.01%	0.05%	
Mexico Benchmark Bond - 10 Year	9.14%	9.37%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	7.64%	
30 Year Fixed-Rate Mortgages, Average, US	6.61%	6.63%	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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