



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.28%	1.53%	1.34%	5.06%	21.13%	34.17%	10.41%	15.62%	13.18%	1.23%
Communications Services	-0.15%	2.63%	2.61%	-0.28%	26.32%	39.95%	4.73%	13.72%	9.54%	0.70%
Consumer Discretionary	1.30%	3.96%	6.91%	7.63%	13.72%	27.39%	3.82%	11.94%	12.94%	0.65%
Consumer Staples	0.57%	-0.97%	1.19%	9.27%	19.08%	23.10%	9.48%	10.37%	9.68%	2.24%
Energy	1.31%	3.90%	-1.41%	-1.03%	9.78%	3.50%	25.96%	13.35%	3.92%	3.30%
Financials	0.10%	1.22%	-0.25%	10.99%	22.28%	37.10%	8.17%	12.32%	11.37%	1.52%
Health Care	-0.25%	-1.41%	-1.44%	6.34%	14.64%	20.56%	6.97%	13.03%	11.08%	1.48%
Industrials	0.66%	2.16%	1.95%	10.00%	18.53%	33.26%	11.75%	13.38%	11.48%	1.32%
Materials	0.87%	1.51%	0.72%	7.65%	12.01%	23.06%	7.46%	12.50%	8.76%	1.79%
Real Estate	1.13%	-0.38%	3.77%	17.70%	14.82%	34.37%	2.35%	6.32%	8.89%	3.03%
Technology	-0.08%	1.89%	0.68%	-0.18%	28.01%	49.63%	17.26%	26.18%	22.07%	0.62%
Utilities	0.99%	2.24%	6.05%	18.75%	29.96%	31.19%	10.66%	8.12%	10.32%	2.79%
DJIA	0.15%	1.21%	1.46%	8.20%	13.38%	26.39%	8.79%	11.60%	11.92%	1.75%
NASDAQ	0.15%	2.18%	1.53%	1.54%	20.39%	36.92%	6.92%	18.12%	15.30%	0.64%
Russell 3000	0.26%	1.59%	1.35%	5.48%	19.78%	33.40%	8.83%	14.88%	12.63%	1.23%
Russell 1000 Growth	0.18%	2.16%	2.14%	2.49%	23.70%	40.65%	10.08%	19.32%	16.36%	0.54%
Russell 1000 Value	0.41%	1.00%	0.62%	8.60%	15.80%	25.52%	8.02%	10.39%	9.02%	1.97%
Russell Midcap	0.56%	1.57%	1.62%	8.57%	13.96%	28.36%	4.40%	10.97%	10.01%	1.50%
Russell 2500	0.11%	1.78%	0.99%	8.22%	10.76%	26.02%	2.37%	9.96%	9.27%	1.35%
Russell 2000	-0.34%	1.43%	0.20%	8.74%	10.62%	26.72%	0.86%	8.77%	8.54%	1.30%
MSCI AC World	0.32%	1.42%	0.87%	5.17%	17.35%	29.16%	6.99%	12.20%	9.62%	1.70%
MSCI AC World ex USA	0.39%	1.16%	-0.05%	5.23%	11.59%	20.85%	2.88%	7.32%	5.22%	2.56%
MSCI EAFE	0.35%	0.60%	-0.88%	5.37%	11.43%	21.29%	4.36%	8.18%	5.85%	2.72%
MSCI Europe	0.33%	0.28%	-1.22%	4.91%	11.58%	22.25%	5.39%	9.16%	5.87%	2.87%
MSCI Japan	0.48%	0.52%	-1.86%	4.36%	11.09%	17.50%	2.14%	6.87%	6.53%	1.85%
MSCI EM (Emerging Markets)	0.39%	2.30%	1.17%	3.22%	11.14%	18.52%	-1.44%	4.72%	3.57%	2.15%
MSCI EM Asia	0.40%	2.61%	1.31%	2.79%	14.33%	20.51%	-1.48%	5.91%	5.08%	1.74%
MSCI EM Eastern Europe	-0.15%	0.76%	-2.01%	-2.08%	6.89%	35.47%	-35.58%	-19.42%	-7.84%	#N/A
MSCI EM Latin America	-0.41%	-1.99%	-0.93%	2.75%	-13.15%	0.69%	5.75%	2.19%	0.52%	4.50%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.05%	-0.57%	1.54%	5.40%	4.65%	10.66%	-1.51%	0.40%	1.86%	4.18%
Bloomberg Municipal State GO (10 Y)	-0.03%	0.12%	0.82%	2.44%	0.65%	6.27%	-0.14%	1.38%	2.37%	2.93%
Barclays US High Yield	-0.01%	0.53%	1.46%	5.12%	7.83%	15.01%	2.90%	4.59%	4.91%	6.99%
Bloomberg Global Aggregate USD	-0.05%	-0.53%	1.52%	5.35%	4.77%	10.76%	-1.46%	0.50%	1.94%	4.22%
Bbg EM Gov't Diversified	-0.11%	0.62%	1.89%	7.59%	3.52%	11.13%	-1.52%	-0.30%	0.20%	6.18%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	1.02%	-0.29%	3.66%	17.15%	14.58%	32.73%	2.00%	4.96%	7.81%	3.42%
Alerian MLP	1.32%	0.12%	1.09%	2.11%	20.19%	27.02%	26.19%	13.10%	1.69%	6.42%
Bloomberg Commodity	0.96%	2.48%	3.43%	-0.70%	4.41%	-1.61%	4.05%	6.91%	-0.10%	
US Dollar Index	0.18%	0.25%	-0.39%	-3.33%	4.03%	1.48%	6.55%	2.79%	3.30%	
Interest Rates	9/23/24	9/16/24	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	3.57%	3.56%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	1.89%	
US Treasury Constant Maturity - 5 Year	3.51%	3.41%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	2.20%	
US Treasury Constant Maturity - 10 Year	3.75%	3.63%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	2.40%	
Germany Benchmark Bond - 10 Year	2.18%	2.13%	2.00%	2.49%	-0.19%	-0.58%	-0.19%	0.24%	0.47%	
Japan Benchmark Bond - 10 Year	0.86%	0.84%	0.61%	0.45%	0.07%	0.02%	-0.02%	0.01%	0.05%	
Mexico Benchmark Bond - 10 Year	9.19%	9.25%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	7.64%	
30 Year Fixed-Rate Mortgages, Average, US	6.67%	6.59%	6.99%	6.66%	3.27%	2.87%	3.86%	4.51%	3.95%	
US Prime Rate	8.00%	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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