



| Equities | 1 Day | 1 Week | MTD | QTD | YTD | 1 Year | 3 Years | 5 Years | 10 Years | Yield |
|-------------------------------------------|----------|---------|----------|----------|----------|----------|----------|----------|----------|-------|
| S&P 500 | -0.28% | 3.51% | 4.92% | 3.97% | 26.93% | 37.14% | 10.18% | 15.89% | 13.37% | 1.18% |
| Communications Services | 0.51% | 4.65% | 4.65% | 6.68% | 37.41% | 45.40% | 7.41% | 14.90% | 10.24% | 0.65% |
| Consumer Discretionary | -1.09% | 7.03% | 10.93% | 9.21% | 24.40% | 37.60% | 3.72% | 13.93% | 13.69% | 0.59% |
| Consumer Staples | 0.09% | -0.22% | 0.71% | -2.11% | 16.24% | 22.09% | 7.38% | 9.67% | 8.74% | 2.27% |
| Energy | -0.46% | 3.62% | 5.43% | 6.26% | 15.14% | 16.33% | 22.51% | 14.91% | 5.02% | 3.17% |
| Financials | -0.31% | 6.45% | 6.89% | 9.76% | 33.81% | 48.79% | 9.46% | 13.06% | 11.97% | 1.40% |
| Health Care | -1.34% | -0.41% | 0.25% | -4.39% | 9.34% | 18.45% | 4.96% | 11.05% | 9.94% | 1.57% |
| Industrials | -0.87% | 4.29% | 6.06% | 4.74% | 25.90% | 40.32% | 11.75% | 13.57% | 11.56% | 1.24% |
| Materials | -1.55% | -1.30% | -0.82% | -4.28% | 9.26% | 21.49% | 2.94% | 11.13% | 8.73% | 1.84% |
| Real Estate | -1.29% | -1.92% | -0.52% | -3.78% | 9.99% | 29.23% | -0.34% | 6.31% | 7.46% | 3.14% |
| Technology | 0.46% | 3.62% | 5.65% | 4.63% | 36.34% | 44.77% | 17.14% | 25.97% | 22.49% | 0.58% |
| Utilities | -1.12% | 0.21% | -1.78% | -2.79% | 26.99% | 34.43% | 9.02% | 8.44% | 9.21% | 2.85% |
| DJIA | -0.83% | 4.04% | 5.18% | 3.86% | 18.33% | 30.31% | 8.91% | 11.89% | 12.01% | 1.56% |
| NASDAQ | -0.09% | 4.59% | 6.58% | 6.05% | 29.21% | 40.41% | 7.55% | 18.70% | 15.68% | 0.63% |
| Russell 3000 | -0.39% | 3.89% | 5.43% | 4.66% | 26.25% | 37.93% | 8.84% | 15.32% | 12.86% | 1.17% |
| Russell 1000 Growth | 0.06% | 4.66% | 6.55% | 6.19% | 32.26% | 42.08% | 10.45% | 20.00% | 16.73% | 0.51% |
| Russell 1000 Value | -0.74% | 2.83% | 3.84% | 2.69% | 19.82% | 32.24% | 7.64% | 10.48% | 9.13% | 1.92% |
| Russell Midcap | -0.72% | 4.14% | 5.84% | 5.27% | 20.68% | 37.30% | 4.69% | 11.81% | 10.26% | 1.42% |
| Russell 2500 | -1.31% | 4.79% | 7.18% | 6.19% | 18.19% | 38.48% | 2.65% | 10.82% | 9.53% | 1.28% |
| Russell 2000 | -1.77% | 5.82% | 8.93% | 7.35% | 19.34% | 41.89% | 1.17% | 9.87% | 8.71% | 1.19% |
| MSCI AC World | -0.72% | 1.66% | 2.99% | 0.72% | 19.93% | 30.95% | 6.47% | 11.85% | 9.88% | 1.68% |
| MSCI AC World ex USA | -1.57% | -2.24% | -1.13% | -5.93% | 7.90% | 19.19% | 1.25% | 5.74% | 5.22% | 2.67% |
| MSCI EAFE | -1.65% | -2.36% | -1.63% | -6.97% | 5.59% | 17.48% | 2.21% | 6.10% | 5.63% | 2.92% |
| MSCI Europe | -2.33% | -4.12% | -2.94% | -8.64% | 3.61% | 15.80% | 2.18% | 6.61% | 5.62% | 3.11% |
| MSCI Japan | -0.38% | 1.28% | 0.32% | -3.58% | 8.67% | 18.10% | 2.18% | 5.41% | 6.38% | 2.03% |
| MSCI EM (Emerging Markets) | -2.01% | -3.13% | -1.43% | -5.69% | 10.57% | 19.60% | -2.00% | 3.75% | 3.87% | 2.15% |
| MSCI EM Asia | -2.37% | -3.61% | -1.67% | -6.02% | 14.60% | 23.06% | -1.87% | 4.91% | 5.31% | 1.72% |
| MSCI EM Eastern Europe | -1.66% | -1.26% | 0.55% | -6.78% | 0.90% | 14.99% | -37.08% | -21.47% | -7.52% | #N/A |
| MSCI EM Latin America | -0.27% | -0.82% | -0.74% | -5.83% | -17.34% | -5.02% | 6.05% | 1.05% | 0.91% | 4.56% |
| Fixed Income | 1 Day | 1 Week | MTD | QTD | YTD | 1 Year | 3 Years | 5 Years | 10 Years | Yield |
| Bloomberg US Aggregate | -0.71% | -0.58% | -0.38% | -2.85% | 1.47% | 7.90% | -2.28% | -0.13% | 1.45% | 4.83% |
| Bloomberg Municipal State GO (10 Y) | 0.05% | 0.21% | 0.54% | -1.24% | -0.49% | 4.83% | -0.37% | 1.22% | 2.24% | 3.27% |
| Barclays US High Yield | -0.12% | 0.53% | 0.67% | 0.13% | 8.15% | 14.68% | 3.07% | 4.62% | 4.93% | 7.19% |
| Bloomberg Global Aggregate USD | -0.68% | -0.54% | -0.36% | -2.76% | 1.69% | 8.06% | -2.20% | -0.03% | 1.55% | 4.87% |
| Bbg EM Gov't Diversified | -0.63% | -1.32% | -1.09% | -5.64% | -1.30% | 5.79% | -2.22% | -1.43% | -0.05% | 6.45% |
| Other | 1 Day | 1 Week | MTD | QTD | YTD | 1 Year | 3 Years | 5 Years | 10 Years | Yield |
| FTSE NAREIT | -1.36% | -1.50% | -0.33% | -4.00% | 9.39% | 28.39% | -0.85% | 4.49% | 6.45% | 3.51% |
| Alerian MLP | -0.81% | 1.05% | 3.31% | 1.93% | 20.85% | 24.84% | 23.33% | 16.22% | 2.17% | 6.61% |
| Bloomberg Commodity | -0.39% | -2.22% | -1.16% | -3.00% | 2.69% | 0.41% | 1.93% | 6.73% | -0.16% | |
| US Dollar Index | 1.05% | 2.65% | 2.16% | 5.89% | 10.19% | 6.33% | 7.84% | 3.95% | 3.53% | |
| Interest Rates | 11/12/24 | 11/5/24 | 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 | 4.34% | 4.19% | 4.23% | 4.41% | 0.73% | 0.13% | 1.58% | 2.48% | 1.89% | |
| US Treasury Constant Maturity - 5 Year | 4.32% | 4.16% | 3.84% | 3.99% | 1.26% | 0.36% | 1.69% | 2.51% | 2.20% | |
| US Treasury Constant Maturity - 10 Year | 4.43% | 4.26% | 3.88% | 3.88% | 1.52% | 0.93% | 1.92% | 2.69% | 2.40% | |
| Germany Benchmark Bond - 10 Year | 2.33% | 2.42% | 2.00% | 2.49% | -0.19% | -0.58% | -0.19% | 0.24% | 0.47% | |
| Japan Benchmark Bond - 10 Year | 1.00% | 0.93% | 0.61% | 0.45% | 0.07% | 0.02% | -0.02% | 0.01% | 0.05% | |
| Mexico Benchmark Bond - 10 Year | 10.03% | 9.97% | 8.95% | 9.02% | 7.56% | 5.55% | 6.84% | 8.71% | 7.64% | |
| 30 Year Fixed-Rate Mortgages, Average, US | 7.32% | 7.24% | 6.99% | 6.66% | 3.27% | 2.87% | 3.86% | 4.51% | 3.95% | |
| US Prime Rate | 7.75% | 8.00% | 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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