



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.29%	-0.21%	0.09%	5.01%	28.19%	32.62%	10.27%	15.77%	13.53%	1.18%
Communications Services	2.61%	2.82%	5.48%	10.86%	42.80%	47.48%	10.32%	15.36%	11.60%	0.66%
Consumer Discretionary	0.14%	4.42%	5.70%	17.95%	34.35%	38.79%	6.31%	15.61%	14.35%	0.55%
Consumer Staples	0.50%	-0.14%	-0.69%	1.10%	20.05%	24.07%	7.80%	9.81%	9.03%	2.20%
Energy	-0.62%	-4.43%	-5.29%	2.07%	10.60%	13.58%	21.05%	14.07%	5.94%	3.29%
Financials	-0.10%	-1.60%	-3.18%	9.64%	33.67%	39.60%	10.42%	12.66%	11.79%	1.40%
Health Care	-0.46%	-1.92%	-2.22%	-6.48%	6.94%	10.77%	3.99%	9.54%	9.41%	1.62%
Industrials	-0.22%	-2.13%	-3.39%	2.57%	23.29%	29.31%	11.51%	13.41%	11.50%	1.28%
Materials	-0.94%	-3.57%	-3.97%	-5.80%	7.52%	12.95%	3.06%	11.04%	8.81%	1.89%
Real Estate	-1.63%	-2.08%	-4.07%	-3.38%	10.44%	17.80%	-0.86%	5.98%	7.12%	3.16%
Technology	-1.26%	0.01%	1.60%	5.30%	37.21%	40.81%	15.66%	25.86%	22.46%	0.58%
Utilities	-0.78%	-2.94%	-5.80%	-3.32%	26.30%	27.16%	7.49%	7.83%	9.05%	2.90%
DJIA	-0.33%	-0.98%	-1.36%	4.94%	19.56%	24.13%	9.31%	11.90%	12.15%	1.56%
NASDAQ	-0.25%	1.09%	2.47%	8.38%	32.05%	37.34%	8.84%	18.83%	15.89%	0.64%
Russell 3000	-0.38%	-0.37%	-0.14%	5.72%	27.53%	32.48%	9.51%	15.18%	13.05%	1.17%
Russell 1000 Growth	-0.29%	1.12%	2.62%	8.92%	35.66%	39.71%	11.15%	20.15%	17.10%	0.51%
Russell 1000 Value	-0.47%	-1.95%	-2.99%	2.07%	19.10%	24.46%	7.90%	10.10%	9.12%	1.94%
Russell Midcap	-0.97%	-2.00%	-2.48%	5.55%	20.99%	27.68%	6.12%	11.53%	10.38%	1.44%
Russell 2500	-0.68%	-1.70%	-2.27%	6.35%	18.37%	26.55%	4.97%	10.46%	9.77%	1.29%
Russell 2000	-0.42%	-1.36%	-2.09%	7.08%	19.03%	28.20%	4.00%	9.29%	8.89%	1.21%
MSCI AC World	-0.51%	-0.16%	0.50%	1.98%	21.43%	26.32%	7.37%	11.94%	10.14%	1.68%
MSCI AC World ex USA	-0.84%	-0.01%	1.30%	-4.48%	9.56%	14.86%	2.91%	6.07%	5.57%	2.72%
MSCI EAFE	-1.14%	-0.49%	0.85%	-5.15%	7.66%	12.56%	3.94%	6.48%	5.89%	2.97%
MSCI Europe	-1.36%	0.36%	1.05%	-6.46%	6.08%	10.25%	4.10%	7.05%	5.79%	3.12%
MSCI Japan	-0.40%	-2.34%	1.20%	-2.10%	10.34%	15.11%	3.56%	5.56%	6.65%	2.21%
MSCI EM (Emerging Markets)	-0.20%	1.31%	3.10%	-4.90%	11.50%	17.16%	-0.54%	4.04%	4.35%	2.18%
MSCI EM Asia	-0.21%	1.07%	3.14%	-5.07%	15.76%	21.16%	-0.49%	5.27%	5.51%	1.78%
MSCI EM Eastern Europe	-0.48%	3.95%	5.35%	-2.88%	5.12%	9.62%	-34.33%	-20.53%	-5.87%	#N/A
MSCI EM Latin America	-0.23%	1.51%	1.16%	-9.30%	-20.38%	-14.00%	5.40%	-0.19%	1.56%	4.64%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.12%	0.22%	0.08%	-1.37%	3.02%	5.85%	-1.80%	0.03%	1.53%	4.64%
Bloomberg Municipal State GO (10 Y)	-0.07%	0.00%	0.38%	0.16%	0.92%	2.26%	0.01%	1.28%	2.39%	3.05%
Barclays US High Yield	-0.03%	0.26%	0.42%	1.02%	9.11%	12.30%	3.47%	4.66%	5.32%	7.09%
Bloomberg Global Aggregate USD	-0.12%	0.22%	0.09%	-1.32%	3.20%	6.00%	-1.72%	0.12%	1.63%	4.68%
Bbg EM Gov't Diversified	-0.08%	0.50%	0.23%	-4.26%	0.14%	3.49%	-1.28%	-1.22%	0.41%	6.42%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-1.44%	-1.65%	-3.47%	-3.69%	9.74%	16.73%	-1.09%	4.13%	6.20%	3.57%
Alerian MLP	-1.04%	-4.57%	-5.81%	6.49%	26.25%	27.85%	29.02%	16.80%	3.84%	6.35%
Bloomberg Commodity	0.35%	1.47%	0.84%	-0.62%	5.20%	6.31%	4.79%	7.36%	0.65%	
US Dollar Index	0.33%	0.10%	0.64%	6.64%	10.97%	8.45%	7.76%	4.25%	3.56%	
Interest Rates	12/10/24	12/3/24	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	4.15%	4.17%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	1.89%	
US Treasury Constant Maturity - 5 Year	4.09%	4.11%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	2.20%	
US Treasury Constant Maturity - 10 Year	4.22%	4.23%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	2.40%	
Germany Benchmark Bond - 10 Year	2.12%	2.04%	2.00%	2.49%	-0.19%	-0.58%	-0.19%	0.24%	0.47%	
Japan Benchmark Bond - 10 Year	1.06%	1.08%	0.61%	0.45%	0.07%	0.02%	-0.02%	0.01%	0.05%	
Mexico Benchmark Bond - 10 Year	9.98%	9.92%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	7.64%	
30 Year Fixed-Rate Mortgages, Average, US	7.00%	7.09%	6.99%	6.66%	3.27%	2.87%	3.86%	4.51%	3.95%	
US Prime Rate	7.75%	7.75%	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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