



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-0.38%	0.29%	0.38%	5.31%	28.56%	29.74%	11.09%	15.39%	13.63%	1.18%
Communications Services	-0.60%	1.87%	7.45%	12.94%	45.47%	50.36%	11.47%	15.54%	11.74%	0.65%
Consumer Discretionary	0.29%	3.67%	9.58%	22.27%	39.27%	39.03%	9.17%	15.93%	14.77%	0.53%
Consumer Staples	-0.12%	-1.10%	-1.79%	-0.01%	18.73%	20.82%	6.99%	9.42%	8.92%	2.22%
Energy	-0.76%	-4.12%	-9.20%	-2.14%	6.04%	6.29%	21.46%	12.60%	5.28%	3.44%
Financials	-0.69%	-1.13%	-4.27%	8.41%	32.16%	33.27%	10.46%	11.91%	11.81%	1.43%
Health Care	-0.05%	-3.33%	-5.48%	-9.59%	3.38%	5.48%	1.98%	8.37%	9.21%	1.69%
Industrials	-0.90%	-1.94%	-5.26%	0.59%	20.90%	22.40%	11.81%	12.71%	11.36%	1.31%
Materials	-0.46%	-3.24%	-7.08%	-8.86%	4.03%	5.12%	2.20%	9.87%	8.60%	1.96%
Real Estate	-0.49%	-1.70%	-5.70%	-5.03%	8.56%	9.72%	-2.02%	6.10%	6.98%	3.23%
Technology	-0.40%	2.18%	3.82%	7.60%	40.21%	40.33%	18.09%	25.62%	22.88%	0.57%
Utilities	-0.38%	-1.76%	-7.46%	-5.02%	24.07%	23.78%	6.42%	6.97%	8.76%	2.95%
DJIA	-0.61%	-1.78%	-3.12%	3.07%	17.43%	18.48%	9.27%	11.18%	12.05%	1.59%
NASDAQ	-0.32%	2.16%	4.68%	10.72%	34.90%	36.41%	10.70%	18.77%	16.24%	0.64%
Russell 3000	-0.49%	0.11%	-0.03%	5.84%	27.67%	28.97%	10.23%	14.79%	13.12%	1.17%
Russell 1000 Growth	-0.29%	2.15%	4.83%	11.26%	38.57%	39.65%	13.08%	20.18%	17.42%	0.50%
Russell 1000 Value	-0.65%	-2.03%	-4.96%	0.00%	16.67%	18.05%	7.37%	9.28%	8.95%	1.99%
Russell Midcap	-0.86%	-1.49%	-3.94%	3.98%	19.19%	20.70%	6.16%	10.88%	10.22%	1.46%
Russell 2500	-1.10%	-1.54%	-3.77%	4.71%	16.55%	18.60%	5.01%	9.80%	9.54%	1.30%
Russell 2000	-1.18%	-2.00%	-4.06%	4.93%	16.65%	19.04%	3.88%	8.50%	8.55%	1.22%
MSCI AC World	-0.44%	-0.24%	0.25%	1.73%	21.14%	22.82%	7.84%	11.35%	10.31%	1.68%
MSCI AC World ex USA	-0.48%	-1.30%	-0.02%	-5.72%	8.13%	10.51%	2.78%	5.15%	5.76%	2.73%
MSCI EAFE	-0.25%	-1.06%	-0.22%	-6.15%	6.52%	8.61%	3.73%	5.74%	6.11%	2.99%
MSCI Europe	-0.46%	-0.87%	0.17%	-7.28%	5.15%	6.93%	4.00%	6.24%	6.03%	3.16%
MSCI Japan	0.06%	-1.44%	-0.26%	-3.51%	8.75%	10.81%	2.92%	5.06%	6.81%	2.21%
MSCI EM (Emerging Markets)	-0.90%	-1.58%	1.47%	-6.40%	9.74%	12.32%	-0.49%	2.69%	4.63%	2.19%
MSCI EM Asia	-0.82%	-1.46%	1.63%	-6.46%	14.07%	16.57%	-0.20%	3.89%	5.73%	1.77%
MSCI EM Eastern Europe	-2.29%	-3.85%	1.30%	-6.62%	1.08%	3.40%	-34.82%	-21.84%	-5.04%	#N/A
MSCI EM Latin America	-0.77%	-3.02%	-1.89%	-12.04%	-22.78%	-19.59%	4.26%	-1.60%	1.63%	4.60%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.00%	-0.93%	-0.85%	-2.29%	2.06%	2.67%	-2.21%	-0.15%	1.44%	4.79%
Bloomberg Municipal State GO (10 Y)	-0.28%	-0.97%	-0.60%	-0.81%	-0.05%	0.33%	-0.33%	1.06%	2.39%	3.25%
Barclays US High Yield	-0.14%	-0.37%	0.04%	0.64%	8.70%	9.79%	3.32%	4.39%	5.42%	7.27%
Bloomberg Global Aggregate USD	-0.01%	-0.90%	-0.81%	-2.21%	2.27%	2.88%	-2.13%	-0.05%	1.55%	4.82%
Bbg EM Gov't Diversified	-0.54%	-1.02%	-0.80%	-5.24%	-0.88%	0.73%	-1.45%	-1.69%	0.51%	6.52%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.46%	-1.47%	-4.89%	-5.10%	8.13%	9.12%	-1.87%	4.34%	6.06%	3.62%
Alerian MLP	-0.77%	-1.58%	-7.30%	4.81%	24.26%	26.19%	29.13%	15.70%	3.84%	6.49%
Bloomberg Commodity	-0.69%	-1.28%	-0.45%	-1.89%	3.85%	3.77%	4.51%	6.60%	0.70%	
US Dollar Index	0.00%	0.63%	1.27%	7.31%	11.67%	10.54%	7.82%	4.41%	3.54%	
Interest Rates	12/17/24	12/10/24	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	4.25%	4.15%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	1.89%	
US Treasury Constant Maturity - 5 Year	4.26%	4.09%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	2.20%	
US Treasury Constant Maturity - 10 Year	4.40%	4.22%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	2.40%	
Germany Benchmark Bond - 10 Year	2.23%	2.12%	2.00%	2.49%	-0.19%	-0.58%	-0.19%	0.24%	0.47%	
Japan Benchmark Bond - 10 Year	1.07%	1.06%	0.61%	0.45%	0.07%	0.02%	-0.02%	0.01%	0.05%	
Mexico Benchmark Bond - 10 Year	10.12%	9.96%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	7.64%	
30 Year Fixed-Rate Mortgages, Average, US	7.13%	7.00%	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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