



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.53%	3.06%	4.10%	4.10%	4.10%	27.28%	13.31%	14.70%	13.54%	1.17%
Communications Services	0.81%	4.03%	5.14%	5.14%	5.14%	39.40%	14.79%	14.51%	11.56%	0.67%
Consumer Discretionary	0.40%	3.09%	4.11%	4.11%	4.11%	38.05%	11.36%	14.57%	14.23%	0.55%
Consumer Staples	0.41%	1.50%	-0.34%	-0.34%	-0.34%	13.35%	5.05%	8.06%	8.11%	2.31%
Energy	0.45%	-1.13%	7.10%	7.10%	7.10%	17.42%	17.85%	14.73%	5.94%	3.22%
Financials	0.60%	1.86%	5.01%	5.01%	5.01%	34.87%	11.97%	12.73%	12.37%	1.38%
Health Care	1.36%	2.09%	4.77%	4.77%	4.77%	4.62%	5.34%	8.48%	9.22%	1.64%
Industrials	0.96%	3.44%	7.52%	7.52%	7.52%	26.84%	13.75%	12.94%	11.64%	1.24%
Materials	0.51%	1.68%	6.07%	6.07%	6.07%	9.55%	4.11%	10.39%	8.56%	1.91%
Real Estate	0.82%	0.82%	1.85%	1.85%	1.85%	10.89%	-0.58%	4.19%	5.94%	3.31%
Technology	0.12%	4.70%	2.84%	2.84%	2.84%	32.42%	21.43%	23.53%	22.58%	0.58%
Utilities	0.47%	-0.10%	3.96%	3.96%	3.96%	33.43%	7.91%	6.29%	8.38%	2.88%
DJIA	0.92%	3.29%	4.82%	4.82%	4.82%	19.57%	11.33%	11.05%	12.13%	1.57%
NASDAQ	0.22%	3.70%	3.86%	3.86%	3.86%	30.67%	14.19%	17.20%	15.92%	0.61%
Russell 3000	0.51%	2.96%	4.34%	4.34%	4.34%	26.91%	12.73%	14.10%	13.00%	1.17%
Russell 1000 Growth	0.39%	3.86%	3.98%	3.98%	3.98%	33.51%	16.81%	18.63%	17.10%	0.51%
Russell 1000 Value	0.65%	1.99%	4.83%	4.83%	4.83%	20.05%	8.59%	9.45%	9.06%	1.96%
Russell Midcap	0.20%	1.72%	4.90%	4.90%	4.90%	21.82%	8.94%	10.36%	10.10%	1.45%
Russell 2500	0.37%	1.97%	4.73%	4.73%	4.73%	19.03%	7.79%	9.38%	9.38%	1.31%
Russell 2000	0.47%	2.11%	3.81%	3.81%	3.81%	18.57%	6.71%	7.96%	8.33%	1.23%
MSCI AC World	0.42%	2.78%	3.73%	3.73%	3.73%	22.08%	9.24%	10.92%	10.12%	1.69%
MSCI AC World ex USA	0.18%	2.17%	2.60%	2.60%	2.60%	12.12%	2.62%	5.06%	5.46%	2.73%
MSCI EAFE	0.26%	2.49%	3.48%	3.48%	3.48%	10.29%	4.08%	5.93%	5.97%	2.95%
MSCI Europe	0.22%	2.88%	5.05%	5.05%	5.05%	11.18%	4.35%	6.66%	6.04%	3.10%
MSCI Japan	0.82%	2.11%	-0.33%	-0.33%	-0.33%	5.38%	3.75%	5.07%	6.40%	2.18%
MSCI EM (Emerging Markets)	-0.09%	1.39%	0.67%	0.67%	0.67%	14.64%	-1.59%	2.09%	3.72%	2.24%
MSCI EM Asia	-0.11%	1.18%	-0.23%	-0.23%	-0.23%	18.94%	-1.38%	3.15%	4.68%	1.84%
MSCI EM Eastern Europe	-0.21%	5.31%	9.63%	9.63%	9.63%	16.10%	-31.85%	-21.30%	-5.00%	#N/A
MSCI EM Latin America	0.40%	3.15%	6.49%	6.49%	6.49%	-15.89%	3.11%	-1.73%	1.39%	4.61%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.33%	1.39%	0.31%	0.31%	0.31%	2.97%	-1.72%	-0.43%	1.25%	4.91%
Bloomberg Municipal State GO (10 Y)	0.22%	0.78%	0.07%	0.07%	0.07%	0.48%	0.01%	0.70%	2.22%	3.41%
Barclays US High Yield	0.25%	1.12%	1.09%	1.09%	1.09%	10.04%	3.82%	4.28%	5.26%	7.23%
Bloomberg Global Aggregate USD	0.33%	1.36%	0.31%	0.31%	0.31%	3.15%	-1.63%	-0.33%	1.36%	4.95%
Bbg EM Gov't Diversified	0.46%	1.40%	1.34%	1.34%	1.34%	1.77%	-1.62%	-1.82%	0.32%	6.42%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.68%	0.53%	1.04%	1.04%	1.04%	9.12%	-0.99%	2.43%	4.99%	3.75%
Alerian MLP	0.27%	1.04%	9.63%	9.63%	9.63%	33.73%	28.24%	17.74%	3.67%	6.01%
Bloomberg Commodity	-0.11%	-0.64%	5.05%	5.05%	5.05%	11.38%	3.64%	8.49%	2.09%	
US Dollar Index	0.03%	-0.81%	-0.17%	-0.17%	-0.17%	10.36%	8.69%	4.55%	3.05%	
Interest Rates	1/23/25	1/16/25	12/31/24	12/29/23	12/30/22	12/31/21	12/31/20	12/31/19	12/31/18	
US Treasury Constant Maturity - 2 Year	4.29%	4.23%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.45%	4.39%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.65%	4.61%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.54%	2.57%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.21%	1.22%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	10.01%	10.28%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	7.32%	7.33%	7.28%	6.99%	6.66%	3.27%	2.87%	3.86%	4.64%	
US Prime Rate	7.50%	7.50%	7.50%	8.50%	7.50%	3.25%	3.25%	4.75%	5.50%	

## 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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