



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.72%	-0.48%	-0.04%	2.75%	2.75%	23.24%	11.98%	14.59%	13.44%	1.19%
Communications Services	1.48%	3.66%	1.42%	10.66%	10.66%	39.56%	16.69%	16.18%	11.88%	0.63%
Consumer Discretionary	1.43%	0.27%	0.07%	4.48%	4.48%	34.54%	10.44%	14.38%	14.00%	0.55%
Consumer Staples	-0.51%	0.79%	0.17%	2.21%	2.21%	13.55%	5.96%	8.80%	8.52%	2.25%
Energy	2.18%	0.60%	2.68%	4.81%	4.81%	11.02%	13.29%	16.08%	5.47%	3.28%
Financials	-0.27%	-0.37%	-0.68%	5.84%	5.84%	33.01%	10.49%	13.14%	12.48%	1.37%
Health Care	-0.27%	0.35%	0.13%	6.93%	6.93%	5.23%	5.34%	9.44%	9.71%	1.60%
Industrials	0.07%	-0.92%	-0.97%	4.02%	4.02%	20.25%	12.93%	12.56%	11.30%	1.29%
Materials	0.28%	0.40%	0.33%	5.94%	5.94%	8.96%	4.48%	10.47%	8.41%	1.91%
Real Estate	0.01%	-0.25%	-0.18%	1.65%	1.65%	11.68%	-0.51%	4.31%	6.08%	3.32%
Technology	1.47%	-2.76%	-0.36%	-3.25%	-3.25%	23.58%	17.73%	21.73%	22.07%	0.61%
Utilities	-0.88%	1.31%	-0.40%	2.52%	2.52%	30.14%	7.64%	5.90%	8.46%	2.92%
DJIA	0.30%	-0.66%	0.03%	4.81%	4.81%	17.26%	10.47%	11.32%	12.13%	1.56%
NASDAQ	1.35%	-0.40%	0.14%	1.80%	1.80%	26.43%	12.57%	16.57%	15.79%	#N/A
Russell 3000	0.75%	-0.37%	-0.04%	3.12%	3.12%	23.35%	11.47%	13.99%	12.90%	1.19%
Russell 1000 Growth	1.18%	-0.63%	0.13%	2.11%	2.11%	28.17%	15.01%	18.12%	16.90%	0.52%
Russell 1000 Value	0.17%	-0.11%	-0.25%	4.37%	4.37%	18.09%	7.81%	9.73%	9.08%	1.96%
Russell Midcap	0.56%	-0.17%	-0.16%	4.08%	4.08%	19.90%	7.96%	10.46%	9.97%	1.46%
Russell 2500	0.93%	-0.44%	-0.27%	3.27%	3.27%	17.32%	6.73%	9.37%	9.16%	1.33%
Russell 2000	1.41%	0.08%	0.12%	2.74%	2.74%	18.14%	6.10%	8.09%	8.19%	1.24%
MSCI AC World	0.88%	-0.19%	-0.24%	3.13%	3.13%	19.24%	8.74%	11.07%	10.02%	1.67%
MSCI AC World ex USA	1.24%	0.28%	-0.63%	3.39%	3.39%	11.15%	3.39%	5.64%	5.43%	2.65%
MSCI EAFE	0.92%	0.34%	-0.96%	4.26%	4.26%	9.30%	4.91%	6.40%	5.86%	2.85%
MSCI Europe	0.95%	0.51%	-0.68%	6.17%	6.17%	9.76%	5.26%	7.02%	5.94%	2.99%
MSCI Japan	0.85%	0.07%	-1.70%	-0.16%	-0.16%	5.77%	4.36%	5.62%	6.31%	2.08%
MSCI EM (Emerging Markets)	1.79%	0.36%	-0.04%	1.77%	1.77%	13.74%	-0.63%	2.99%	3.93%	2.26%
MSCI EM Asia	2.02%	0.06%	-0.18%	0.58%	0.58%	17.41%	-0.31%	4.02%	4.83%	1.82%
MSCI EM Eastern Europe	1.64%	-0.37%	-1.06%	11.20%	11.20%	10.47%	-31.98%	-20.51%	-4.55%	#N/A
MSCI EM Latin America	1.10%	2.71%	1.17%	10.82%	10.82%	-13.82%	3.97%	-0.29%	2.09%	4.64%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.17%	0.17%	0.25%	0.78%	0.78%	2.70%	-1.13%	-0.48%	1.26%	4.84%
Bloomberg Municipal State GO (10 Y)	0.11%	0.45%	0.20%	1.03%	1.03%	0.71%	0.61%	0.79%	2.11%	3.24%
Barclays US High Yield	0.11%	0.02%	-0.08%	1.29%	1.29%	9.47%	4.43%	4.40%	5.17%	7.25%
Bloomberg Global Aggregate USD	0.17%	0.17%	0.24%	0.78%	0.78%	2.88%	-1.05%	-0.38%	1.36%	4.88%
Bbg EM Gov't Diversified	0.56%	0.08%	0.13%	2.29%	2.29%	2.18%	-1.28%	-1.61%	0.44%	6.36%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.03%	-0.42%	-0.25%	0.94%	0.94%	10.52%	-0.94%	2.53%	5.13%	3.73%
Alerian MLP	0.91%	2.49%	2.66%	11.68%	11.68%	33.06%	25.25%	19.21%	4.87%	6.11%
Bloomberg Commodity	0.42%	2.27%	1.92%	5.95%	5.95%	13.24%	2.60%	9.85%	2.13%	
US Dollar Index	-0.34%	0.20%	-0.34%	-0.10%	-0.10%	9.88%	8.81%	4.49%	3.16%	
Interest Rates	2/4/25	1/28/25	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	4.21%	4.19%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.31%	4.33%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.52%	4.55%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.41%	2.56%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.27%	1.20%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	10.07%	9.99%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	7.25%	7.27%	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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