



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.39%	0.38%	0.35%	3.15%	3.15%	24.11%	12.11%	14.42%	13.37%	1.18%
Communications Services	-2.79%	0.45%	-1.42%	7.57%	7.57%	36.79%	15.58%	15.51%	11.54%	0.65%
Consumer Discretionary	-1.59%	-0.83%	-1.52%	2.82%	2.82%	34.16%	9.84%	13.90%	13.75%	0.56%
Consumer Staples	0.89%	1.41%	1.06%	3.12%	3.12%	15.23%	6.26%	8.83%	8.57%	2.23%
Energy	0.13%	0.56%	2.81%	4.94%	4.94%	11.43%	13.32%	15.26%	5.34%	3.28%
Financials	1.08%	0.73%	0.39%	6.97%	6.97%	35.24%	10.87%	12.95%	12.49%	1.36%
Health Care	1.02%	1.96%	1.15%	8.02%	8.02%	5.97%	5.68%	9.24%	9.64%	1.59%
Industrials	0.09%	-0.45%	-0.87%	4.11%	4.11%	21.01%	12.95%	12.21%	11.21%	1.29%
Materials	-0.03%	0.56%	0.30%	5.91%	5.91%	11.72%	4.46%	10.05%	8.14%	1.91%
Real Estate	1.58%	2.55%	1.40%	3.26%	3.26%	15.73%	0.01%	4.65%	6.12%	3.27%
Technology	1.57%	-0.14%	1.21%	-1.73%	-1.73%	24.78%	18.32%	21.96%	22.14%	0.60%
Utilities	1.04%	2.17%	0.64%	3.59%	3.59%	34.18%	7.99%	6.03%	8.48%	2.89%
DJIA	0.71%	0.36%	0.74%	5.56%	5.56%	18.93%	10.72%	11.10%	12.07%	1.56%
NASDAQ	0.20%	0.31%	0.33%	2.00%	2.00%	26.93%	12.62%	16.52%	15.69%	#N/A
Russell 3000	0.45%	0.52%	0.42%	3.59%	3.59%	24.47%	11.62%	13.87%	12.83%	1.18%
Russell 1000 Growth	0.19%	0.22%	0.32%	2.31%	2.31%	28.41%	15.07%	18.06%	16.80%	0.52%
Russell 1000 Value	0.68%	0.76%	0.43%	5.08%	5.08%	19.97%	8.05%	9.53%	9.03%	1.94%
Russell Midcap	0.63%	0.83%	0.47%	4.74%	4.74%	21.87%	8.17%	10.39%	9.92%	1.45%
Russell 2500	0.92%	0.91%	0.65%	4.22%	4.22%	19.84%	7.05%	9.32%	9.11%	1.32%
Russell 2000	1.14%	1.47%	1.26%	3.91%	3.91%	21.03%	6.49%	8.01%	8.16%	1.22%
MSCI AC World	0.55%	0.52%	0.31%	3.70%	3.70%	20.41%	8.93%	11.00%	10.00%	1.69%
MSCI AC World ex USA	0.86%	0.68%	0.23%	4.28%	4.28%	12.78%	3.68%	5.68%	5.50%	2.70%
MSCI EAFE	1.07%	0.81%	0.11%	5.38%	5.38%	11.06%	5.28%	6.46%	5.96%	2.90%
MSCI Europe	0.88%	0.89%	0.19%	7.10%	7.10%	11.50%	5.56%	7.01%	6.02%	3.03%
MSCI Japan	1.97%	0.80%	0.24%	1.81%	1.81%	7.52%	5.04%	5.90%	6.57%	2.14%
MSCI EM (Emerging Markets)	0.26%	0.33%	0.23%	2.04%	2.04%	14.61%	-0.54%	2.97%	3.95%	2.23%
MSCI EM Asia	0.38%	0.15%	0.20%	0.96%	0.96%	18.47%	-0.19%	4.01%	4.90%	1.86%
MSCI EM Eastern Europe	-0.22%	-0.44%	-1.27%	10.96%	10.96%	12.10%	-31.99%	-20.65%	-4.84%	#N/A
MSCI EM Latin America	-0.65%	2.20%	0.51%	10.10%	10.10%	-14.01%	3.74%	-0.42%	1.98%	4.54%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.50%	0.74%	0.75%	1.29%	1.29%	3.98%	-0.97%	-0.35%	1.31%	4.78%
Bloomberg Municipal State GO (10 Y)	0.32%	0.72%	0.53%	1.36%	1.36%	1.47%	0.71%	0.88%	2.11%	3.18%
Barclays US High Yield	0.23%	0.25%	0.16%	1.53%	1.53%	10.11%	4.51%	4.41%	5.17%	7.17%
Bloomberg Global Aggregate USD	0.49%	0.72%	0.73%	1.27%	1.27%	4.12%	-0.89%	-0.25%	1.42%	4.82%
Bbg EM Gov't Diversified	0.46%	0.37%	0.59%	2.76%	2.76%	3.60%	-1.13%	-1.53%	0.48%	6.34%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	1.35%	2.35%	1.10%	2.31%	2.31%	14.21%	-0.50%	2.79%	5.14%	3.68%
Alerian MLP	0.80%	2.84%	3.48%	12.58%	12.58%	34.50%	25.55%	19.14%	4.87%	6.06%
Bloomberg Commodity	-0.04%	1.52%	1.88%	5.91%	5.91%	13.38%	2.58%	9.65%	2.04%	
US Dollar Index	-1.31%	-0.27%	-0.68%	-0.44%	-0.44%	8.93%	8.67%	4.34%	3.17%	
Interest Rates	2/5/25	1/29/25	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	4.17%	4.21%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.24%	4.35%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.43%	4.55%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.35%	2.56%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.29%	1.18%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.96%	10.02%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	7.18%	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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