



| Equities | 1 Day | 1 Week | MTD | QTD | YTD | 1 Year | 3 Years | 5 Years | 10 Years | Yield |
|---|--------|---------|----------|----------|----------|----------|----------|----------|----------|-------|
| S&P 500 | 0.36% | 0.22% | 0.72% | 3.52% | 3.52% | 24.27% | 12.22% | 14.43% | 13.44% | 1.18% |
| Communications Services | 0.51% | -0.18% | -0.91% | 8.12% | 8.12% | 37.78% | 15.75% | 15.37% | 11.39% | 0.65% |
| Consumer Discretionary | 0.45% | -0.99% | -1.08% | 3.28% | 3.28% | 34.26% | 9.99% | 14.04% | 13.82% | 0.56% |
| Consumer Staples | 0.88% | 1.22% | 1.95% | 4.03% | 4.03% | 15.98% | 6.56% | 8.95% | 8.71% | 2.21% |
| Energy | -1.64% | -1.64% | 1.12% | 3.22% | 3.22% | 9.23% | 12.68% | 15.11% | 5.17% | 3.33% |
| Financials | 0.84% | 0.62% | 1.23% | 7.87% | 7.87% | 35.98% | 11.16% | 13.16% | 12.50% | 1.35% |
| Health Care | -0.94% | -0.15% | 0.20% | 7.01% | 7.01% | 3.86% | 5.35% | 9.01% | 9.63% | 1.60% |
| Industrials | 0.42% | -1.17% | -0.46% | 4.55% | 4.55% | 20.44% | 13.09% | 12.23% | 11.28% | 1.28% |
| Materials | 0.34% | -0.10% | 0.64% | 6.26% | 6.26% | 10.23% | 4.57% | 10.14% | 8.21% | 1.89% |
| Real Estate | 0.30% | 1.48% | 1.71% | 3.58% | 3.58% | 14.38% | 0.11% | 4.63% | 6.44% | 3.26% |
| Technology | 0.66% | 1.08% | 1.87% | -1.09% | -1.09% | 26.19% | 18.55% | 21.90% | 22.30% | 0.60% |
| Utilities | -0.06% | -0.03% | 0.57% | 3.52% | 3.52% | 33.66% | 7.96% | 6.01% | 8.93% | 2.89% |
| DJIA | -0.28% | -0.30% | 0.46% | 5.26% | 5.26% | 18.17% | 10.60% | 10.97% | 12.07% | 1.56% |
| NASDAQ | 0.51% | 0.57% | 0.84% | 2.52% | 2.52% | 27.47% | 12.79% | 16.47% | 15.79% | #N/A |
| Russell 3000 | 0.29% | 0.20% | 0.71% | 3.89% | 3.89% | 24.42% | 11.71% | 13.87% | 12.90% | 1.18% |
| Russell 1000 Growth | 0.60% | 0.60% | 0.92% | 2.92% | 2.92% | 29.08% | 15.27% | 18.06% | 16.91% | 0.52% |
| Russell 1000 Value | 0.01% | -0.25% | 0.44% | 5.09% | 5.09% | 19.28% | 8.04% | 9.54% | 9.06% | 1.94% |
| Russell Midcap | 0.05% | -0.29% | 0.52% | 4.80% | 4.80% | 21.00% | 8.18% | 10.43% | 9.97% | 1.45% |
| Russell 2500 | -0.19% | -0.39% | 0.45% | 4.02% | 4.02% | 18.79% | 6.97% | 9.34% | 9.13% | 1.32% |
| Russell 2000 | -0.39% | 0.01% | 0.86% | 3.51% | 3.51% | 19.55% | 6.34% | 7.98% | 8.14% | 1.22% |
| MSCI AC World | 0.42% | 0.32% | 0.73% | 4.13% | 4.13% | 20.35% | 9.07% | 10.97% | 10.09% | 1.69% |
| MSCI AC World ex USA | 0.56% | 0.51% | 0.79% | 4.87% | 4.87% | 12.46% | 3.87% | 5.61% | 5.60% | 2.70% |
| MSCI EAFE | 0.64% | 0.61% | 0.75% | 6.05% | 6.05% | 11.17% | 5.49% | 6.43% | 6.08% | 2.90% |
| MSCI Europe | 0.66% | 0.62% | 0.84% | 7.80% | 7.80% | 11.35% | 5.78% | 7.09% | 6.14% | 3.03% |
| MSCI Japan | 0.46% | 0.57% | 0.70% | 2.27% | 2.27% | 8.16% | 5.19% | 5.59% | 6.69% | 2.14% |
| MSCI EM (Emerging Markets) | 0.59% | 0.60% | 0.82% | 2.64% | 2.64% | 13.38% | -0.34% | 2.85% | 4.05% | 2.23% |
| MSCI EM Asia | 0.49% | 0.55% | 0.69% | 1.46% | 1.46% | 16.97% | -0.02% | 3.72% | 4.97% | 1.86% |
| MSCI EM Eastern Europe | 2.81% | 0.70% | 1.50% | 14.07% | 14.07% | 15.08% | -31.33% | -20.01% | -4.76% | #N/A |
| MSCI EM Latin America | 1.64% | 1.34% | 2.16% | 11.91% | 11.91% | -14.81% | 4.30% | 0.09% | 2.28% | 4.54% |
| Fixed Income | 1 Day | 1 Week | MTD | QTD | YTD | 1 Year | 3 Years | 5 Years | 10 Years | Yield |
| Bloomberg US Aggregate | -0.07% | 0.53% | 0.68% | 1.22% | 1.22% | 3.43% | -0.99% | -0.38% | 1.36% | 4.80% |
| Bloomberg Municipal State GO (10 Y) | 0.03% | 0.57% | 0.55% | 1.38% | 1.38% | 1.47% | 0.72% | 0.88% | 2.11% | 3.17% |
| Barclays US High Yield | 0.02% | 0.17% | 0.18% | 1.54% | 1.54% | 9.93% | 4.51% | 4.38% | 5.14% | 7.17% |
| Bloomberg Global Aggregate USD | -0.06% | 0.52% | 0.67% | 1.21% | 1.21% | 3.59% | -0.91% | -0.28% | 1.46% | 4.83% |
| Bbg EM Gov't Diversified | 0.06% | 0.15% | 0.65% | 2.82% | 2.82% | 3.27% | -1.11% | -1.51% | 0.56% | 6.32% |
| Other | 1 Day | 1 Week | MTD | QTD | YTD | 1 Year | 3 Years | 5 Years | 10 Years | Yield |
| FTSE NAREIT | 0.43% | 1.34% | 1.54% | 2.75% | 2.75% | 13.25% | -0.35% | 2.80% | 5.47% | 3.68% |
| Alerian MLP | -1.49% | -1.16% | 1.94% | 10.90% | 10.90% | 33.33% | 24.89% | 19.08% | 4.87% | 6.06% |
| Bloomberg Commodity | 0.18% | 1.64% | 2.06% | 6.10% | 6.10% | 13.38% | 2.64% | 9.62% | 2.04% | |
| US Dollar Index | -0.24% | 0.00% | -0.58% | -0.34% | -0.34% | 9.28% | 8.70% | 4.31% | 3.06% | |
| Interest Rates | 2/6/25 | 1/30/25 | 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% | 4.18% | 4.25% | 4.23% | 4.41% | 0.73% | 0.13% | 1.58% | 2.48% | |
| US Treasury Constant Maturity - 5 Year | 4.28% | 4.31% | 4.38% | 3.84% | 3.99% | 1.26% | 0.36% | 1.69% | 2.51% | |
| US Treasury Constant Maturity - 10 Year | 4.45% | 4.52% | 4.58% | 3.88% | 3.88% | 1.52% | 0.93% | 1.92% | 2.69% | |
| Germany Benchmark Bond - 10 Year | 2.37% | 2.51% | 2.35% | 1.94% | 2.53% | -0.18% | -0.58% | -0.19% | 0.24% | |
| Japan Benchmark Bond - 10 Year | 1.27% | 1.21% | 1.09% | 0.59% | 0.42% | 0.07% | 0.02% | -0.02% | 0.01% | |
| Mexico Benchmark Bond - 10 Year | 9.85% | 9.96% | 10.41% | 8.95% | 9.02% | 7.56% | 5.55% | 6.84% | 8.71% | |
| 30 Year Fixed-Rate Mortgages, Average, US | 7.20% | 7.26% | 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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