



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	1.04%	0.55%	1.28%	4.10%	4.10%	24.94%	13.10%	14.34%	13.27%	1.19%
Communications Services	1.08%	0.33%	-0.59%	8.48%	8.48%	37.53%	17.40%	15.12%	11.42%	0.69%
Consumer Discretionary	1.61%	-1.98%	-3.04%	1.24%	1.24%	31.43%	10.09%	13.03%	13.29%	0.58%
Consumer Staples	0.97%	2.57%	4.58%	6.71%	6.71%	20.48%	7.78%	9.34%	8.88%	2.17%
Energy	0.77%	1.18%	2.32%	4.44%	4.44%	10.71%	12.35%	15.18%	4.99%	3.29%
Financials	0.72%	-0.76%	0.46%	7.05%	7.05%	35.38%	10.87%	12.91%	12.27%	1.37%
Health Care	0.40%	-0.50%	-0.30%	6.47%	6.47%	4.11%	5.68%	8.91%	9.43%	1.62%
Industrials	0.09%	0.13%	-0.33%	4.68%	4.68%	20.67%	13.41%	12.14%	11.10%	1.29%
Materials	1.71%	0.87%	1.51%	7.18%	7.18%	10.95%	4.47%	10.50%	7.97%	1.87%
Real Estate	0.84%	0.24%	1.96%	3.83%	3.83%	16.28%	1.12%	3.90%	6.46%	3.25%
Technology	1.52%	2.12%	4.03%	1.01%	1.01%	27.89%	20.54%	22.21%	22.04%	0.59%
Utilities	0.14%	1.35%	1.94%	4.92%	4.92%	36.46%	9.23%	5.96%	9.40%	2.87%
DJIA	0.77%	-0.05%	0.41%	5.21%	5.21%	18.82%	10.94%	10.89%	11.93%	1.56%
NASDAQ	1.51%	0.80%	1.64%	3.33%	3.33%	28.07%	13.92%	16.31%	15.53%	#N/A
Russell 3000	1.06%	0.37%	1.08%	4.27%	4.27%	24.72%	12.36%	13.73%	12.71%	1.18%
Russell 1000 Growth	1.27%	0.70%	1.63%	3.64%	3.64%	29.31%	16.56%	17.89%	16.70%	0.52%
Russell 1000 Value	0.80%	0.12%	0.57%	5.22%	5.22%	19.94%	8.25%	9.45%	8.90%	1.95%
Russell Midcap	0.95%	-0.31%	0.21%	4.48%	4.48%	20.54%	8.01%	10.10%	9.72%	1.46%
Russell 2500	1.23%	-0.83%	-0.38%	3.15%	3.15%	17.38%	6.27%	8.89%	8.83%	1.34%
Russell 2000	1.17%	-1.06%	-0.21%	2.41%	2.41%	17.62%	5.47%	7.54%	7.87%	1.25%
MSCI AC World	1.10%	0.83%	1.57%	5.00%	5.00%	21.48%	9.52%	11.02%	9.99%	1.66%
MSCI AC World ex USA	1.21%	1.42%	2.22%	6.36%	6.36%	14.54%	3.84%	5.90%	5.61%	2.64%
MSCI EAFE	1.69%	1.59%	2.35%	7.74%	7.74%	13.31%	5.55%	6.80%	6.09%	2.84%
MSCI Europe	1.70%	2.31%	3.18%	10.30%	10.30%	15.14%	6.14%	7.57%	6.23%	2.96%
MSCI Japan	2.16%	-0.49%	0.20%	1.77%	1.77%	5.81%	4.65%	5.72%	6.37%	2.13%
MSCI EM (Emerging Markets)	0.20%	1.03%	1.86%	3.70%	3.70%	14.85%	-0.53%	2.99%	4.06%	2.20%
MSCI EM Asia	0.16%	1.06%	1.76%	2.53%	2.53%	18.31%	-0.05%	3.81%	5.04%	1.81%
MSCI EM Eastern Europe	1.51%	5.50%	7.08%	20.34%	20.34%	23.27%	-30.58%	-19.11%	-4.95%	#N/A
MSCI EM Latin America	0.52%	0.30%	2.47%	12.25%	12.25%	-12.44%	2.70%	0.21%	2.17%	4.50%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.60%	-0.41%	0.27%	0.80%	0.80%	4.45%	-0.99%	-0.51%	1.34%	4.88%
Bloomberg Municipal State GO (10 Y)	0.16%	-0.56%	-0.01%	0.82%	0.82%	1.07%	0.83%	0.73%	2.11%	3.30%
Barclays US High Yield	0.20%	-0.13%	0.04%	1.41%	1.41%	10.00%	4.80%	4.26%	5.10%	7.26%
Bloomberg Global Aggregate USD	0.58%	-0.40%	0.26%	0.81%	0.81%	4.58%	-0.90%	-0.41%	1.44%	4.92%
Bbg EM Gov't Diversified	0.47%	0.01%	0.66%	2.83%	2.83%	3.67%	-1.14%	-1.47%	0.64%	6.38%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.99%	0.44%	1.98%	3.20%	3.20%	15.37%	0.38%	2.27%	5.51%	3.69%
Alerian MLP	2.02%	-0.29%	1.65%	10.58%	10.58%	32.39%	24.40%	19.20%	4.87%	6.19%
Bloomberg Commodity	0.37%	1.58%	3.67%	7.77%	7.77%	15.46%	3.07%	9.85%	2.02%	
US Dollar Index	-0.54%	-0.24%	-0.81%	-0.58%	-0.58%	8.14%	8.40%	4.14%	3.10%	
Interest Rates	2/13/25	2/6/25	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	4.31%	4.21%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.39%	4.28%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.52%	4.45%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.42%	2.37%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.35%	1.27%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.90%	9.75%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	7.20%	7.20%	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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