



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.26%	1.06%	1.56%	4.39%	4.39%	23.91%	13.82%	14.43%	13.29%	1.18%
Communications Services	-1.26%	0.25%	-1.44%	7.55%	7.55%	36.48%	18.09%	14.81%	11.43%	0.70%
Consumer Discretionary	-0.50%	0.54%	-3.77%	0.48%	0.48%	28.50%	9.98%	12.88%	13.24%	0.58%
Consumer Staples	0.13%	0.21%	3.53%	5.64%	5.64%	18.64%	7.03%	9.14%	8.72%	2.19%
Energy	1.37%	0.04%	4.10%	6.26%	6.26%	9.84%	14.36%	15.89%	5.31%	3.24%
Financials	0.78%	1.25%	1.41%	8.06%	8.06%	33.54%	12.10%	13.30%	12.41%	1.36%
Health Care	-0.20%	-0.98%	-1.56%	5.12%	5.12%	0.89%	6.01%	8.69%	9.20%	1.64%
Industrials	0.81%	0.06%	0.21%	5.25%	5.25%	19.15%	14.06%	12.40%	11.09%	1.28%
Materials	1.23%	1.95%	2.45%	8.17%	8.17%	8.62%	4.88%	10.74%	8.04%	1.86%
Real Estate	0.40%	-0.10%	1.94%	3.81%	3.81%	13.92%	1.69%	3.70%	6.39%	3.25%
Technology	0.55%	2.65%	5.24%	2.18%	2.18%	29.48%	21.74%	22.45%	22.15%	0.59%
Utilities	1.00%	0.59%	2.54%	5.54%	5.54%	34.44%	9.91%	5.76%	9.22%	2.88%
DJIA	0.04%	0.00%	0.14%	4.93%	4.93%	17.28%	11.53%	10.97%	11.89%	1.58%
NASDAQ	0.07%	2.03%	2.14%	3.84%	3.84%	27.67%	14.80%	16.38%	15.55%	#N/A
Russell 3000	0.28%	1.04%	1.38%	4.58%	4.58%	23.43%	13.12%	13.80%	12.72%	1.18%
Russell 1000 Growth	-0.01%	1.28%	1.74%	3.75%	3.75%	28.51%	17.36%	17.82%	16.67%	0.52%
Russell 1000 Value	0.61%	0.80%	1.07%	5.75%	5.75%	18.36%	9.00%	9.67%	8.95%	1.94%
Russell Midcap	0.70%	1.08%	0.92%	5.21%	5.21%	18.90%	8.92%	10.24%	9.75%	1.45%
Russell 2500	0.66%	1.15%	0.32%	3.87%	3.87%	14.93%	6.91%	9.07%	8.85%	1.33%
Russell 2000	0.47%	0.69%	0.18%	2.81%	2.81%	14.10%	5.98%	7.75%	7.87%	1.25%
MSCI AC World	0.28%	1.66%	2.22%	5.68%	5.68%	20.48%	10.39%	11.25%	10.02%	1.64%
MSCI AC World ex USA	0.34%	2.80%	3.59%	7.78%	7.78%	13.69%	4.87%	6.37%	5.69%	2.56%
MSCI EAFE	0.11%	2.87%	3.41%	8.85%	8.85%	12.29%	6.59%	7.22%	6.10%	2.74%
MSCI Europe	0.19%	3.14%	4.16%	11.34%	11.34%	13.58%	7.31%	7.87%	6.27%	2.84%
MSCI Japan	0.09%	2.41%	1.71%	3.30%	3.30%	6.56%	5.73%	6.58%	6.33%	2.08%
MSCI EM (Emerging Markets)	0.76%	3.15%	4.24%	6.12%	6.12%	15.27%	0.46%	3.65%	4.32%	2.18%
MSCI EM Asia	0.72%	3.51%	4.33%	5.12%	5.12%	18.76%	1.02%	4.53%	5.30%	1.80%
MSCI EM Eastern Europe	2.44%	5.78%	10.06%	23.69%	23.69%	22.82%	-28.79%	-18.45%	-4.74%	#N/A
MSCI EM Latin America	0.60%	2.68%	5.38%	15.43%	15.43%	-11.00%	3.75%	0.98%	2.45%	4.11%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.36%	0.02%	0.22%	0.75%	0.75%	4.08%	-0.93%	-0.58%	1.35%	4.89%
Bloomberg Municipal State GO (10 Y)	0.03%	-0.15%	0.23%	1.06%	1.06%	1.21%	0.98%	0.74%	2.11%	3.26%
Barclays US High Yield	0.04%	0.26%	0.29%	1.66%	1.66%	10.08%	4.99%	4.30%	5.10%	7.20%
Bloomberg Global Aggregate USD	-0.34%	0.03%	0.23%	0.77%	0.77%	4.23%	-0.83%	-0.48%	1.45%	4.93%
Bbg EM Gov't Diversified	-0.06%	0.86%	1.18%	3.35%	3.35%	3.96%	-1.10%	-1.34%	0.72%	6.36%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.42%	0.09%	1.90%	3.11%	3.11%	12.91%	0.79%	2.07%	5.45%	3.69%
Alerian MLP	1.85%	3.04%	4.03%	13.18%	13.18%	31.09%	27.27%	19.78%	4.87%	6.05%
Bloomberg Commodity	1.38%	1.63%	5.11%	9.27%	9.27%	17.02%	3.01%	9.92%	2.28%	
US Dollar Index	0.38%	-0.75%	-1.02%	-0.78%	-0.78%	8.53%	8.36%	4.02%	3.08%	
Interest Rates	2/18/25	2/11/25	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%	4.29%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.40%	4.37%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.55%	4.54%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.50%	2.43%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.41%	1.31%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.85%	9.84%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	7.18%	7.22%	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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