



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.24%	1.57%	1.80%	4.64%	4.64%	24.20%	13.89%	14.37%	13.32%	1.18%
Communications Services	0.00%	0.22%	-1.44%	7.55%	7.55%	36.48%	18.07%	14.73%	11.49%	0.70%
Consumer Discretionary	0.03%	0.88%	-3.73%	0.51%	0.51%	28.54%	9.98%	12.78%	13.21%	0.58%
Consumer Staples	0.79%	0.74%	4.34%	6.47%	6.47%	19.56%	7.30%	9.33%	8.87%	2.17%
Energy	0.72%	3.26%	4.85%	7.02%	7.02%	10.62%	14.61%	15.75%	5.46%	3.25%
Financials	-0.03%	1.65%	1.38%	8.03%	8.03%	33.50%	12.07%	13.13%	12.45%	1.36%
Health Care	1.26%	0.37%	-0.33%	6.44%	6.44%	2.15%	6.44%	8.86%	9.33%	1.62%
Industrials	0.08%	0.72%	0.29%	5.34%	5.34%	19.25%	14.08%	12.43%	11.08%	1.28%
Materials	-1.16%	1.46%	1.26%	6.92%	6.92%	7.37%	4.47%	10.44%	7.88%	1.88%
Real Estate	0.16%	0.98%	2.10%	3.98%	3.98%	14.10%	1.74%	4.01%	6.64%	3.24%
Technology	0.15%	2.85%	5.39%	2.33%	2.33%	29.67%	21.77%	22.21%	22.12%	0.59%
Utilities	0.47%	1.21%	3.02%	6.04%	6.04%	35.07%	10.07%	6.08%	9.39%	2.87%
DJIA	0.16%	0.67%	0.30%	5.10%	5.10%	17.47%	11.58%	10.91%	11.93%	1.58%
NASDAQ	0.07%	2.08%	2.22%	3.92%	3.92%	27.77%	14.81%	16.19%	15.51%	#N/A
Russell 3000	0.12%	1.48%	1.50%	4.70%	4.70%	23.58%	13.15%	13.72%	12.74%	1.18%
Russell 1000 Growth	0.00%	1.37%	1.74%	3.75%	3.75%	28.50%	17.34%	17.67%	16.65%	0.52%
Russell 1000 Value	0.31%	1.62%	1.39%	6.08%	6.08%	18.73%	9.10%	9.67%	9.03%	1.94%
Russell Midcap	-0.35%	1.32%	0.57%	4.85%	4.85%	18.49%	8.79%	10.10%	9.72%	1.46%
Russell 2500	-0.50%	1.42%	-0.19%	3.35%	3.35%	14.36%	6.72%	8.88%	8.81%	1.34%
Russell 2000	-0.34%	1.22%	-0.16%	2.46%	2.46%	13.71%	5.85%	7.56%	7.83%	1.26%
MSCI AC World	-0.10%	1.65%	2.12%	5.57%	5.57%	20.29%	10.34%	11.13%	9.99%	1.64%
MSCI AC World ex USA	-0.65%	1.89%	2.91%	7.08%	7.08%	12.80%	4.63%	6.14%	5.58%	2.55%
MSCI EAFE	-0.92%	1.79%	2.46%	7.85%	7.85%	11.04%	6.25%	6.98%	5.95%	2.72%
MSCI Europe	-1.25%	1.39%	2.86%	9.96%	9.96%	12.01%	6.86%	7.49%	6.08%	2.83%
MSCI Japan	-0.15%	3.54%	1.56%	3.15%	3.15%	5.90%	5.67%	6.69%	6.22%	2.07%
MSCI EM (Emerging Markets)	-0.18%	2.36%	4.05%	5.93%	5.93%	15.04%	0.40%	3.47%	4.30%	2.17%
MSCI EM Asia	-0.03%	2.67%	4.30%	5.09%	5.09%	18.83%	1.01%	4.38%	5.29%	1.78%
MSCI EM Eastern Europe	-1.65%	2.61%	8.24%	21.65%	21.65%	19.98%	-29.15%	-18.98%	-4.75%	#N/A
MSCI EM Latin America	-1.03%	2.31%	4.30%	14.24%	14.24%	-12.29%	3.39%	0.67%	2.38%	4.11%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.13%	0.68%	0.35%	0.88%	0.88%	4.21%	-0.89%	-0.54%	1.38%	4.87%
Bloomberg Municipal State GO (10 Y)	-0.01%	0.40%	0.23%	1.05%	1.05%	1.21%	0.98%	0.74%	2.11%	3.26%
Barclays US High Yield	-0.05%	0.41%	0.25%	1.62%	1.62%	10.03%	4.97%	4.28%	5.09%	7.23%
Bloomberg Global Aggregate USD	0.12%	0.67%	0.35%	0.90%	0.90%	4.35%	-0.79%	-0.44%	1.48%	4.90%
Bbg EM Gov't Diversified	-0.15%	0.83%	1.03%	3.20%	3.20%	3.81%	-1.14%	-1.36%	0.70%	6.36%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-0.09%	0.82%	1.81%	3.02%	3.02%	12.81%	0.76%	2.32%	5.63%	3.70%
Alerian MLP	-0.40%	3.99%	3.62%	12.73%	12.73%	30.57%	27.06%	19.83%	4.87%	6.07%
Bloomberg Commodity	0.25%	2.02%	5.38%	9.54%	9.54%	17.32%	3.09%	9.84%	2.31%	
US Dollar Index	0.52%	-0.61%	-0.88%	-0.65%	-0.65%	8.67%	8.40%	4.00%	3.07%	
Interest Rates	2/19/25	2/12/25	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	4.28%	4.36%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.37%	4.48%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.53%	4.62%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.54%	2.48%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.43%	1.33%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.85%	9.90%	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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