



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-1.22%	-2.95%	-2.95%	-1.55%	-1.55%	14.07%	11.78%	14.77%	12.62%	1.26%
Communications Services	-0.40%	-2.14%	-1.75%	0.47%	0.47%	28.08%	15.78%	15.08%	10.75%	0.74%
Consumer Discretionary	-1.67%	-4.29%	-3.90%	-9.07%	-9.07%	13.79%	8.11%	12.56%	11.88%	0.65%
Consumer Staples	-1.78%	-1.69%	-1.18%	6.58%	6.58%	17.68%	7.45%	9.75%	8.87%	2.19%
Energy	-0.86%	-2.88%	-4.34%	1.52%	1.52%	4.25%	8.86%	18.30%	5.22%	3.44%
Financials	-3.53%	-2.00%	-4.35%	3.36%	3.36%	25.59%	12.37%	14.73%	11.94%	1.42%
Health Care	-0.93%	-0.45%	-0.57%	7.76%	7.76%	3.09%	5.53%	10.00%	9.29%	1.60%
Industrials	-1.96%	-2.31%	-3.36%	0.05%	0.05%	9.72%	11.37%	13.32%	10.59%	1.35%
Materials	-1.35%	-3.21%	-3.36%	2.03%	2.03%	-1.44%	3.18%	10.81%	7.46%	1.98%
Real Estate	-1.21%	0.22%	-0.43%	5.69%	5.69%	11.36%	0.80%	4.94%	6.92%	3.19%
Technology	0.02%	-4.74%	-3.51%	-7.55%	-7.55%	12.00%	18.44%	21.99%	20.86%	0.65%
Utilities	-1.69%	-1.83%	-1.50%	3.10%	3.10%	28.37%	6.58%	5.94%	9.40%	2.93%
DJIA	-1.55%	-2.42%	-2.97%	0.25%	0.25%	10.98%	10.32%	11.62%	11.33%	1.62%
NASDAQ	-0.35%	-3.88%	-2.98%	-5.22%	-5.22%	13.54%	12.01%	16.03%	14.36%	#N/A
Russell 3000	-1.22%	-3.01%	-3.04%	-1.89%	-1.89%	13.14%	10.94%	14.10%	12.00%	1.26%
Russell 1000 Growth	-0.61%	-3.56%	-3.07%	-4.70%	-4.70%	15.31%	14.65%	17.53%	15.59%	0.57%
Russell 1000 Value	-1.92%	-2.28%	-2.92%	1.99%	1.99%	11.51%	7.55%	10.61%	8.65%	2.02%
Russell Midcap	-1.51%	-2.94%	-3.04%	-1.79%	-1.79%	7.85%	6.64%	10.62%	9.02%	1.55%
Russell 2500	-1.42%	-4.03%	-3.90%	-5.16%	-5.16%	2.50%	3.95%	9.09%	7.86%	1.46%
Russell 2000	-1.07%	-4.13%	-3.84%	-6.60%	-6.60%	1.60%	2.77%	7.72%	6.81%	1.38%
MSCI AC World	-1.13%	-2.34%	-1.94%	0.79%	0.79%	12.40%	9.90%	11.82%	9.49%	1.68%
MSCI AC World ex USA	-1.00%	-1.25%	0.01%	5.52%	5.52%	9.23%	6.86%	7.43%	5.45%	2.58%
MSCI EAFE	-1.08%	-0.31%	0.70%	8.07%	8.07%	9.07%	9.65%	8.75%	5.97%	2.74%
MSCI Europe	-1.69%	-0.16%	0.17%	11.03%	11.03%	10.97%	11.73%	9.45%	6.23%	2.83%
MSCI Japan	0.49%	-0.25%	2.65%	2.84%	2.84%	2.73%	7.03%	8.12%	6.09%	2.11%
MSCI EM (Emerging Markets)	-0.40%	-2.56%	-0.39%	1.92%	1.92%	9.16%	1.55%	3.92%	3.98%	2.21%
MSCI EM Asia	-0.29%	-2.61%	-0.44%	1.00%	1.00%	11.80%	2.07%	4.53%	4.82%	1.82%
MSCI EM Eastern Europe	-3.44%	-2.40%	-1.70%	17.33%	17.33%	14.64%	-12.24%	-17.62%	-4.88%	#N/A
MSCI EM Latin America	-0.50%	-3.97%	-0.77%	6.73%	6.73%	-16.85%	0.25%	1.30%	2.10%	4.33%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.27%	0.44%	-0.04%	2.70%	2.70%	5.49%	-0.50%	-0.64%	1.55%	4.58%
Bloomberg Municipal State GO (10 Y)	-0.01%	0.14%	0.02%	1.85%	1.85%	1.74%	1.18%	0.73%	2.34%	3.13%
Barclays US High Yield	-0.14%	0.02%	-0.17%	1.88%	1.88%	9.56%	4.99%	4.59%	5.05%	7.23%
Bloomberg Global Aggregate USD	-0.26%	0.45%	-0.03%	2.69%	2.69%	5.60%	-0.33%	-0.54%	1.64%	4.62%
Bbg EM Gov't Diversified	-0.06%	-0.56%	0.19%	3.15%	3.15%	3.40%	0.61%	-1.42%	0.88%	6.41%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-1.27%	0.17%	-0.70%	4.75%	4.75%	11.00%	0.09%	3.45%	5.89%	3.66%
Alerian MLP	-2.16%	-0.97%	-2.88%	9.29%	9.29%	23.11%	23.60%	22.54%	5.01%	6.29%
Bloomberg Commodity	0.24%	-1.40%	0.90%	5.70%	5.70%	11.39%	-2.41%	10.03%	2.06%	
US Dollar Index	-1.70%	-0.45%	-1.70%	-1.80%	-1.80%	7.68%	7.03%	4.21%	2.79%	
Interest Rates	3/4/25	2/25/25	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	3.96%	4.07%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.01%	4.12%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.22%	4.30%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.47%	2.45%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.42%	1.39%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.44%	9.61%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.94%	7.03%	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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