



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	1.12%	-1.88%	-1.86%	-0.45%	-0.45%	16.52%	12.18%	15.81%	12.73%	1.24%
Communications Services	1.50%	-0.76%	-0.28%	1.97%	1.97%	31.00%	16.33%	16.29%	10.93%	0.73%
Consumer Discretionary	1.75%	-2.24%	-2.22%	-7.48%	-7.48%	17.30%	8.72%	13.81%	12.06%	0.64%
Consumer Staples	0.43%	0.60%	-0.75%	7.04%	7.04%	17.78%	7.59%	10.27%	8.88%	2.18%
Energy	-1.50%	-3.87%	-5.78%	0.00%	0.00%	1.92%	8.30%	18.81%	5.12%	3.49%
Financials	0.63%	-1.18%	-3.75%	4.01%	4.01%	26.22%	12.58%	16.01%	11.96%	1.41%
Health Care	1.01%	1.25%	0.43%	8.85%	8.85%	4.95%	5.87%	10.75%	9.36%	1.58%
Industrials	1.59%	-0.82%	-1.82%	1.64%	1.64%	12.38%	11.94%	14.83%	10.74%	1.33%
Materials	2.64%	-0.60%	-0.81%	4.72%	4.72%	1.68%	4.08%	12.10%	7.78%	1.93%
Real Estate	1.01%	1.79%	0.58%	6.75%	6.75%	13.88%	1.13%	5.65%	6.98%	3.16%
Technology	1.39%	-4.26%	-2.17%	-6.27%	-6.27%	16.08%	18.96%	23.13%	21.04%	0.64%
Utilities	-0.68%	-2.86%	-2.17%	2.40%	2.40%	27.83%	6.33%	6.14%	9.25%	2.95%
DJIA	1.14%	-0.88%	-1.86%	1.40%	1.40%	13.41%	10.72%	12.69%	11.43%	1.65%
NASDAQ	1.47%	-2.73%	-1.56%	-3.83%	-3.83%	17.13%	12.53%	17.09%	14.49%	#N/A
Russell 3000	1.16%	-1.93%	-1.92%	-0.76%	-0.76%	15.64%	11.35%	15.14%	12.11%	1.24%
Russell 1000 Growth	1.44%	-2.56%	-1.68%	-3.33%	-3.33%	18.86%	15.18%	18.65%	15.74%	0.56%
Russell 1000 Value	0.85%	-1.07%	-2.09%	2.86%	2.86%	12.83%	7.84%	11.57%	8.72%	2.00%
Russell Midcap	1.16%	-1.81%	-1.92%	-0.65%	-0.65%	9.95%	7.04%	11.64%	9.10%	1.54%
Russell 2500	1.23%	-3.07%	-2.71%	-3.99%	-3.99%	4.56%	4.37%	10.12%	7.96%	1.44%
Russell 2000	1.03%	-3.33%	-2.85%	-5.64%	-5.64%	3.67%	3.12%	8.69%	6.89%	1.36%
MSCI AC World	1.49%	-1.16%	-0.48%	2.30%	2.30%	14.93%	10.43%	12.59%	9.63%	1.68%
MSCI AC World ex USA	2.14%	0.12%	2.15%	7.77%	7.77%	11.79%	7.61%	7.90%	5.65%	2.55%
MSCI EAFE	2.19%	1.24%	2.90%	10.44%	10.44%	11.41%	10.43%	9.24%	6.17%	2.69%
MSCI Europe	3.06%	1.81%	3.23%	14.43%	14.43%	14.51%	12.84%	10.32%	6.49%	2.77%
MSCI Japan	-0.17%	0.16%	2.47%	2.67%	2.67%	1.66%	6.96%	7.73%	6.06%	2.07%
MSCI EM (Emerging Markets)	2.08%	-1.68%	1.68%	4.04%	4.04%	12.36%	2.24%	4.32%	4.21%	2.20%
MSCI EM Asia	2.21%	-1.89%	1.76%	3.23%	3.23%	15.37%	2.81%	4.75%	5.10%	1.82%
MSCI EM Eastern Europe	5.78%	1.41%	3.99%	24.11%	24.11%	22.04%	-10.57%	-16.38%	-4.52%	#N/A
MSCI EM Latin America	1.70%	-1.94%	0.92%	8.54%	8.54%	-15.33%	0.81%	2.75%	2.28%	4.35%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.37%	-0.15%	-0.41%	2.32%	2.32%	4.60%	-0.62%	-0.77%	1.50%	4.65%
Bloomberg Municipal State GO (10 Y)	-0.03%	-0.02%	-0.01%	1.82%	1.82%	1.61%	1.17%	0.70%	2.34%	3.13%
Barclays US High Yield	0.09%	-0.05%	-0.07%	1.97%	1.97%	9.60%	5.01%	4.72%	5.06%	7.21%
Bloomberg Global Aggregate USD	-0.36%	-0.13%	-0.39%	2.32%	2.32%	4.75%	-0.45%	-0.66%	1.60%	4.69%
Bbg EM Gov't Diversified	0.97%	0.24%	1.16%	4.16%	4.16%	4.34%	0.93%	-1.12%	0.98%	6.42%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	0.97%	1.66%	0.27%	5.76%	5.76%	13.29%	0.41%	4.11%	5.96%	3.62%
Alerian MLP	-0.97%	-2.45%	-3.82%	8.23%	8.23%	21.10%	23.17%	23.09%	5.01%	6.35%
Bloomberg Commodity	0.78%	-0.12%	1.69%	6.53%	6.53%	12.65%	-2.15%	10.37%	2.17%	
US Dollar Index	-2.23%	-1.89%	-3.03%	-3.13%	-3.13%	6.23%	6.54%	4.03%	2.61%	
Interest Rates	3/5/25	2/26/25	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	3.99%	4.05%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.08%	4.06%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.28%	4.25%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.75%	2.44%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.44%	1.35%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.57%	9.52%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.99%	6.99%	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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