



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	-1.78%	-2.07%	-3.61%	-2.22%	-2.22%	13.86%	11.49%	15.80%	12.69%	1.27%
Communications Services	-2.17%	-1.10%	-2.44%	-0.24%	-0.24%	28.39%	15.47%	16.07%	10.85%	0.75%
Consumer Discretionary	-2.93%	-3.38%	-5.08%	-10.19%	-10.19%	14.27%	7.64%	13.46%	11.87%	0.66%
Consumer Staples	-0.11%	0.47%	-0.86%	6.93%	6.93%	16.72%	7.55%	10.42%	9.07%	2.18%
Energy	0.51%	-3.84%	-5.29%	0.51%	0.51%	2.09%	8.47%	20.31%	5.35%	3.48%
Financials	-1.67%	-3.38%	-5.36%	2.27%	2.27%	23.60%	11.94%	16.39%	11.86%	1.44%
Health Care	-0.28%	1.39%	0.16%	8.55%	8.55%	3.93%	5.77%	10.80%	9.54%	1.59%
Industrials	-0.92%	-1.37%	-2.72%	0.71%	0.71%	10.81%	11.59%	14.82%	10.79%	1.34%
Materials	-0.52%	-0.43%	-1.33%	4.17%	4.17%	0.39%	3.89%	12.58%	7.87%	1.94%
Real Estate	-2.78%	-1.42%	-2.22%	3.79%	3.79%	10.11%	0.19%	5.41%	7.00%	3.25%
Technology	-2.64%	-3.12%	-4.75%	-8.75%	-8.75%	12.01%	17.89%	22.97%	20.86%	0.66%
Utilities	-2.05%	-2.69%	-4.18%	0.30%	0.30%	24.02%	5.60%	5.87%	9.35%	3.01%
DJIA	-0.99%	-1.43%	-2.84%	0.39%	0.39%	12.03%	10.34%	12.69%	11.49%	1.65%
NASDAQ	-2.60%	-2.54%	-4.12%	-6.33%	-6.33%	13.44%	11.54%	16.92%	14.31%	#N/A
Russell 3000	-1.88%	-2.27%	-3.76%	-2.63%	-2.63%	12.83%	10.63%	15.12%	12.05%	1.24%
Russell 1000 Growth	-2.74%	-2.68%	-4.37%	-5.98%	-5.98%	15.03%	14.10%	18.37%	15.58%	0.56%
Russell 1000 Value	-0.94%	-1.70%	-3.01%	1.89%	1.89%	11.09%	7.49%	11.81%	8.77%	2.00%
Russell Midcap	-1.85%	-2.55%	-3.73%	-2.49%	-2.49%	7.07%	6.37%	11.72%	9.06%	1.54%
Russell 2500	-1.82%	-3.49%	-4.48%	-5.74%	-5.74%	1.99%	3.73%	10.17%	7.91%	1.44%
Russell 2000	-1.63%	-3.37%	-4.43%	-7.17%	-7.17%	1.28%	2.56%	8.77%	6.86%	1.36%
MSCI AC World	-0.95%	-0.76%	-1.42%	1.33%	1.33%	13.17%	10.07%	12.84%	9.65%	1.68%
MSCI AC World ex USA	0.83%	1.88%	3.00%	8.67%	8.67%	11.96%	7.90%	8.61%	5.83%	2.55%
MSCI EAFE	0.70%	2.80%	3.62%	11.21%	11.21%	11.40%	10.67%	9.90%	6.34%	2.69%
MSCI Europe	0.42%	3.61%	3.67%	14.91%	14.91%	14.21%	12.98%	11.01%	6.69%	2.77%
MSCI Japan	1.69%	1.43%	4.21%	4.41%	4.41%	2.74%	7.55%	8.44%	6.20%	2.07%
MSCI EM (Emerging Markets)	1.42%	0.67%	3.13%	5.52%	5.52%	13.25%	2.72%	5.17%	4.40%	2.20%
MSCI EM Asia	1.58%	0.61%	3.37%	4.86%	4.86%	16.46%	3.34%	5.62%	5.21%	1.82%
MSCI EM Eastern Europe	1.92%	5.55%	5.98%	26.49%	26.49%	23.49%	-9.99%	-15.31%	-4.22%	#N/A
MSCI EM Latin America	1.09%	0.15%	2.02%	9.72%	9.72%	-14.91%	1.17%	3.73%	2.66%	4.35%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.05%	-0.07%	-0.46%	2.27%	2.27%	4.33%	-0.64%	-0.98%	1.55%	4.65%
Bloomberg Municipal State GO (10 Y)	-0.45%	-0.46%	-0.46%	1.36%	1.36%	1.01%	1.02%	0.52%	2.34%	3.22%
Barclays US High Yield	-0.24%	-0.28%	-0.31%	1.73%	1.73%	9.21%	4.93%	4.94%	5.06%	7.30%
Bloomberg Global Aggregate USD	-0.06%	-0.06%	-0.45%	2.26%	2.26%	4.47%	-0.47%	-0.86%	1.65%	4.69%
Bbg EM Gov't Diversified	0.26%	0.97%	1.42%	4.43%	4.43%	4.32%	1.02%	-1.01%	1.12%	6.44%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	-2.38%	-1.34%	-2.12%	3.25%	3.25%	10.08%	-0.38%	3.95%	6.04%	3.62%
Alerian MLP	-1.28%	-3.27%	-5.05%	6.85%	6.85%	17.96%	22.61%	24.58%	5.01%	6.35%
Bloomberg Commodity	0.04%	0.25%	1.73%	6.57%	6.57%	12.03%	-2.14%	10.96%	2.27%	
US Dollar Index	-1.56%	-2.87%	-3.23%	-3.33%	-3.33%	6.42%	6.46%	4.17%	2.46%	
Interest Rates	3/6/25	2/27/25	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	4.06%	4.09%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.29%	4.29%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.91%	2.43%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.51%	1.40%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.46%	9.50%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	7.01%	7.00%	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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