



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.65%	1.12%	-4.61%	-3.23%	-3.23%	12.36%	10.42%	19.32%	12.55%	1.29%
Communications Services	0.12%	0.15%	-5.24%	-3.10%	-3.10%	21.91%	14.01%	18.67%	10.54%	0.77%
Consumer Discretionary	-0.44%	-0.12%	-9.16%	-14.05%	-14.05%	10.26%	4.65%	17.01%	11.34%	0.68%
Consumer Staples	1.55%	-2.03%	-4.04%	3.50%	3.50%	12.72%	7.24%	11.32%	8.79%	2.31%
Energy	1.57%	3.27%	0.35%	6.50%	6.50%	2.99%	11.26%	32.21%	6.17%	3.33%
Financials	1.18%	2.27%	-5.92%	1.66%	1.66%	22.21%	10.12%	20.92%	11.64%	1.47%
Health Care	1.18%	-0.71%	-1.57%	6.68%	6.68%	2.56%	4.23%	12.92%	9.08%	1.64%
Industrials	1.35%	0.59%	-2.52%	0.91%	0.91%	10.55%	10.93%	20.03%	10.76%	1.36%
Materials	1.14%	1.15%	-2.02%	3.44%	3.44%	-2.51%	2.62%	16.95%	8.07%	1.98%
Real Estate	1.67%	0.23%	-2.32%	3.67%	3.67%	11.86%	-0.16%	9.69%	6.73%	3.32%
Technology	0.18%	2.58%	-5.19%	-9.16%	-9.16%	11.88%	17.15%	26.27%	20.94%	0.66%
Utilities	0.42%	1.33%	-0.02%	4.64%	4.64%	28.82%	6.84%	10.05%	9.62%	2.91%
DJIA	0.86%	-0.11%	-4.42%	-1.25%	-1.25%	9.97%	8.80%	16.79%	11.31%	1.72%
NASDAQ	0.31%	1.97%	-5.46%	-7.64%	-7.64%	12.23%	10.21%	20.27%	14.13%	0.60%
Russell 3000	0.77%	1.37%	-4.64%	-3.51%	-3.51%	11.67%	9.58%	19.05%	11.89%	1.29%
Russell 1000 Growth	0.24%	1.72%	-6.15%	-7.74%	-7.74%	12.86%	12.56%	21.62%	15.33%	0.59%
Russell 1000 Value	1.31%	0.88%	-2.98%	1.93%	1.93%	10.67%	6.94%	16.19%	8.73%	2.05%
Russell Midcap	1.48%	1.61%	-3.73%	-2.49%	-2.49%	7.42%	5.67%	16.91%	8.94%	1.59%
Russell 2500	1.40%	2.08%	-4.51%	-5.77%	-5.77%	2.82%	2.74%	16.19%	7.72%	1.50%
Russell 2000	1.19%	2.50%	-4.27%	-7.01%	-7.01%	2.79%	1.53%	14.80%	6.66%	1.40%
MSCI AC World	0.89%	1.34%	-2.14%	0.58%	0.58%	11.97%	8.94%	17.10%	9.62%	1.74%
MSCI AC World ex USA	1.23%	1.52%	2.86%	8.52%	8.52%	11.23%	6.71%	13.62%	5.94%	2.55%
MSCI EAFE	1.28%	1.33%	3.30%	10.86%	10.86%	10.71%	8.50%	15.03%	6.40%	2.70%
MSCI Europe	1.28%	1.78%	3.82%	15.08%	15.08%	12.79%	9.95%	16.95%	6.87%	2.77%
MSCI Japan	1.17%	0.68%	3.48%	3.68%	3.68%	4.67%	7.36%	12.12%	5.94%	2.07%
MSCI EM (Emerging Markets)	1.06%	1.69%	3.21%	5.61%	5.61%	12.46%	3.42%	9.51%	4.64%	2.18%
MSCI EM Asia	1.02%	1.17%	2.75%	4.24%	4.24%	14.57%	3.58%	9.25%	5.30%	1.79%
MSCI EM Eastern Europe	1.26%	7.23%	11.20%	32.72%	32.72%	31.06%	17.91%	-9.06%	-3.09%	#N/A
MSCI EM Latin America	1.54%	6.64%	7.80%	15.94%	15.94%	-9.59%	2.76%	11.94%	3.60%	4.29%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.12%	-0.41%	-0.52%	2.21%	2.21%	5.28%	0.15%	-0.24%	1.48%	4.70%
Bloomberg Municipal State GO (10 Y)	0.09%	-0.77%	-1.07%	0.73%	0.73%	0.44%	1.37%	1.53%	2.34%	3.36%
Barclays US High Yield	0.16%	-0.30%	-0.78%	1.25%	1.25%	8.67%	5.18%	7.33%	5.11%	7.55%
Bloomberg Global Aggregate USD	0.12%	-0.40%	-0.51%	2.20%	2.20%	5.37%	0.34%	-0.08%	1.58%	4.73%
Bbg EM Gov't Diversified	0.28%	0.66%	1.82%	4.84%	4.84%	4.72%	2.21%	0.94%	1.38%	6.46%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	1.55%	0.09%	-2.20%	3.16%	3.16%	11.98%	-0.67%	9.70%	5.73%	3.82%
Alerian MLP	1.77%	3.91%	0.35%	12.92%	12.92%	26.02%	27.14%	42.31%	5.01%	6.19%
Bloomberg Commodity	0.50%	0.86%	2.79%	7.68%	7.68%	11.54%	-1.11%	14.16%	2.77%	
US Dollar Index	-0.32%	-0.53%	-3.78%	-3.87%	-3.87%	5.60%	6.56%	3.25%	2.21%	
Interest Rates	3/17/25	3/10/25	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	4.06%	3.89%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.11%	3.98%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.31%	4.22%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.81%	2.82%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.50%	1.58%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.44%	9.50%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.72%	6.97%	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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