



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	1.77%	1.65%	-3.03%	-1.63%	-1.63%	11.63%	10.12%	20.49%	12.64%	1.29%
Communications Services	2.10%	1.89%	-3.45%	-1.27%	-1.27%	18.56%	13.52%	19.28%	10.66%	0.78%
Consumer Discretionary	4.07%	4.49%	-5.08%	-10.18%	-10.18%	12.08%	5.03%	17.06%	11.71%	0.68%
Consumer Staples	0.66%	-1.02%	-5.02%	2.44%	2.44%	10.45%	6.55%	13.52%	8.56%	2.31%
Energy	1.00%	2.63%	2.99%	9.30%	9.30%	3.87%	10.37%	32.81%	6.28%	3.19%
Financials	1.79%	2.52%	-3.55%	4.23%	4.23%	23.01%	10.80%	22.65%	11.97%	1.49%
Health Care	0.76%	0.71%	-0.87%	7.43%	7.43%	2.87%	4.50%	14.73%	9.00%	1.63%
Industrials	1.88%	1.38%	-1.18%	2.30%	2.30%	8.93%	11.09%	21.53%	10.93%	1.35%
Materials	1.24%	-0.12%	-2.14%	3.32%	3.32%	-3.59%	1.38%	17.34%	8.04%	1.98%
Real Estate	1.43%	-0.14%	-2.46%	3.53%	3.53%	12.12%	0.01%	12.36%	6.35%	3.32%
Technology	1.71%	1.48%	-3.79%	-7.82%	-7.82%	10.30%	15.94%	26.46%	20.94%	0.66%
Utilities	-0.01%	-0.58%	-0.60%	4.04%	4.04%	26.20%	6.26%	13.03%	9.39%	2.91%
DJIA	1.42%	1.78%	-2.73%	0.50%	0.50%	9.76%	9.20%	17.79%	11.40%	1.68%
NASDAQ	2.28%	2.15%	-3.43%	-5.66%	-5.66%	11.45%	9.47%	20.51%	14.24%	0.60%
Russell 3000	1.89%	1.76%	-2.96%	-1.82%	-1.82%	11.10%	9.36%	20.15%	11.98%	1.29%
Russell 1000 Growth	2.28%	2.34%	-3.95%	-5.57%	-5.57%	12.30%	11.98%	22.38%	15.47%	0.59%
Russell 1000 Value	1.39%	1.09%	-1.92%	3.04%	3.04%	10.06%	6.96%	17.77%	8.78%	2.03%
Russell Midcap	2.19%	1.85%	-1.95%	-0.69%	-0.69%	7.20%	5.69%	18.26%	9.02%	1.57%
Russell 2500	2.57%	2.05%	-2.56%	-3.84%	-3.84%	2.86%	3.07%	17.15%	7.79%	1.48%
Russell 2000	2.55%	2.00%	-2.35%	-5.15%	-5.15%	3.18%	2.02%	15.46%	6.69%	1.38%
MSCI AC World	1.16%	1.01%	-1.15%	1.60%	1.60%	11.07%	8.59%	17.76%	9.49%	1.71%
MSCI AC World ex USA	-0.06%	-0.30%	2.55%	8.20%	8.20%	9.86%	6.27%	13.61%	5.53%	2.48%
MSCI EAFE	-0.51%	-1.00%	2.27%	9.75%	9.75%	8.28%	7.91%	14.57%	5.89%	2.61%
MSCI Europe	-0.28%	-1.48%	2.29%	13.38%	13.38%	10.69%	9.50%	15.90%	6.26%	2.67%
MSCI Japan	-1.61%	0.23%	3.72%	3.92%	3.92%	0.70%	6.82%	11.97%	5.73%	1.99%
MSCI EM (Emerging Markets)	0.42%	0.52%	3.76%	6.16%	6.16%	12.46%	3.10%	10.27%	4.37%	2.15%
MSCI EM Asia	0.49%	0.87%	3.65%	5.15%	5.15%	14.91%	3.63%	10.00%	5.18%	1.79%
MSCI EM Eastern Europe	1.92%	-0.48%	10.66%	32.08%	32.08%	30.89%	18.64%	-9.56%	-3.80%	#N/A
MSCI EM Latin America	-0.34%	-0.63%	7.12%	15.21%	15.21%	-10.34%	-0.06%	13.93%	3.01%	4.08%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	-0.43%	-0.06%	-0.59%	2.14%	2.14%	4.45%	0.39%	-0.17%	1.38%	4.70%
Bloomberg Municipal State GO (10 Y)	-0.13%	-0.11%	-1.18%	0.63%	0.63%	0.58%	1.65%	2.50%	2.34%	3.39%
Barclays US High Yield	0.23%	0.50%	-0.28%	1.76%	1.76%	8.57%	5.49%	9.13%	5.10%	7.46%
Bloomberg Global Aggregate USD	-0.42%	-0.05%	-0.56%	2.14%	2.14%	4.57%	0.58%	0.04%	1.48%	4.74%
Bbg EM Gov't Diversified	-0.08%	-1.10%	0.70%	3.69%	3.69%	4.18%	2.10%	1.46%	0.91%	6.57%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	1.34%	-0.28%	-2.47%	2.87%	2.87%	11.78%	-0.56%	12.36%	5.36%	3.79%
Alerian MLP	0.59%	-0.32%	0.02%	12.55%	12.55%	23.87%	25.10%	42.37%	5.01%	6.14%
Bloomberg Commodity	-0.20%	-0.24%	2.54%	7.43%	7.43%	11.71%	-2.43%	13.47%	2.43%	
US Dollar Index	0.18%	0.95%	-2.86%	-2.96%	-2.96%	5.37%	6.61%	2.95%	2.57%	
Interest Rates	3/24/25	3/17/25	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	4.04%	4.06%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.09%	4.11%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.34%	4.31%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.79%	2.81%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.54%	1.50%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.47%	9.44%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.71%	6.72%	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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