



Equities	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
S&P 500	0.79%	6.81%	-3.62%	-3.62%	-7.74%	6.91%	8.80%	15.40%	11.89%	1.36%
Communications Services	0.25%	5.66%	-2.43%	-2.43%	-8.49%	8.48%	12.65%	14.77%	9.79%	0.82%
Consumer Discretionary	-0.10%	5.10%	-3.63%	-3.63%	-16.94%	5.64%	3.48%	11.81%	10.84%	0.71%
Consumer Staples	1.64%	6.03%	0.83%	0.83%	6.10%	17.76%	5.67%	10.66%	8.79%	2.22%
Energy	0.25%	0.80%	-15.13%	-15.13%	-6.46%	-14.59%	3.64%	23.70%	4.05%	3.71%
Financials	1.03%	6.89%	-5.34%	-5.34%	-2.00%	19.53%	10.58%	18.09%	11.30%	1.57%
Health Care	1.18%	3.02%	-5.05%	-5.05%	1.16%	1.42%	1.68%	9.16%	8.39%	1.73%
Industrials	1.04%	8.13%	-3.10%	-3.10%	-3.29%	4.91%	10.15%	17.10%	10.26%	1.40%
Materials	1.09%	6.45%	-4.92%	-4.92%	-2.25%	-7.30%	-0.74%	12.14%	7.31%	2.03%
Real Estate	2.15%	4.59%	-4.98%	-4.98%	-1.58%	10.54%	-3.16%	6.13%	6.15%	3.42%
Technology	0.63%	10.03%	-2.23%	-2.23%	-14.60%	4.76%	16.06%	21.22%	20.21%	0.71%
Utilities	1.75%	5.80%	-1.48%	-1.48%	3.39%	24.71%	3.98%	8.50%	9.33%	2.95%
DJIA	0.78%	6.76%	-3.46%	-3.46%	-4.30%	8.58%	7.68%	13.30%	10.84%	1.76%
NASDAQ	0.64%	7.88%	-2.69%	-2.69%	-12.67%	4.78%	8.87%	15.43%	13.39%	#N/A
Russell 3000	0.82%	6.60%	-3.88%	-3.88%	-8.42%	5.92%	7.88%	14.98%	11.17%	1.36%
Russell 1000 Growth	0.50%	8.01%	-2.38%	-2.38%	-12.11%	6.54%	11.30%	17.05%	14.65%	0.64%
Russell 1000 Value	1.17%	5.33%	-5.23%	-5.23%	-3.20%	5.89%	4.87%	12.78%	8.03%	2.14%
Russell Midcap	1.27%	5.72%	-5.08%	-5.08%	-8.31%	1.66%	3.42%	12.78%	8.13%	1.67%
Russell 2500	1.12%	4.81%	-6.09%	-6.09%	-13.13%	-3.89%	0.51%	11.64%	6.68%	1.59%
Russell 2000	1.11%	3.92%	-6.48%	-6.48%	-15.35%	-4.80%	-0.65%	10.16%	5.46%	1.52%
MSCI AC World	1.26%	7.44%	-3.13%	-3.13%	-4.31%	6.59%	7.30%	13.16%	8.71%	1.85%
MSCI AC World ex USA	2.10%	8.57%	-2.19%	-2.19%	3.06%	6.21%	5.09%	9.83%	4.81%	2.72%
MSCI EAFE	2.48%	10.00%	-1.76%	-1.76%	5.12%	6.11%	6.93%	10.88%	5.35%	2.86%
MSCI Europe	2.91%	9.75%	-1.36%	-1.36%	9.13%	9.06%	8.21%	12.56%	5.80%	2.96%
MSCI Japan	1.09%	11.80%	-2.81%	-2.81%	-2.32%	-2.97%	6.69%	7.86%	4.94%	2.13%
MSCI EM (Emerging Markets)	1.47%	5.95%	-3.58%	-3.58%	-0.68%	4.80%	1.35%	6.39%	3.07%	2.49%
MSCI EM Asia	1.24%	5.72%	-4.09%	-4.09%	-2.72%	5.87%	1.67%	6.02%	3.68%	2.01%
MSCI EM Eastern Europe	2.96%	11.11%	-0.32%	-0.32%	27.87%	24.31%	18.06%	-12.90%	-5.05%	#N/A
MSCI EM Latin America	2.64%	5.09%	-1.47%	-1.47%	11.16%	-12.01%	-0.96%	10.37%	2.19%	4.40%
Fixed Income	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
Bloomberg US Aggregate	0.62%	-0.81%	-1.06%	-1.06%	1.69%	5.59%	1.10%	-0.83%	1.32%	4.75%
Bloomberg Municipal State GO (10 Y)	0.60%	-0.39%	-1.54%	-1.54%	-1.53%	-0.66%	1.44%	0.38%	2.12%	3.86%
Barclays US High Yield	0.68%	0.94%	-1.74%	-1.74%	-0.75%	6.94%	4.99%	5.72%	4.71%	8.38%
Bloomberg Global Aggregate USD	0.61%	-0.80%	-1.08%	-1.08%	1.65%	5.62%	1.24%	-0.64%	1.41%	4.80%
Bbg EM Gov't Diversified	0.85%	1.59%	1.34%	1.34%	4.84%	7.10%	2.75%	0.69%	0.95%	6.51%
Other	1 Day	1 Week	MTD	QTD	YTD	1 Year	3 Years	5 Years	10 Years	Yield
FTSE NAREIT	2.03%	4.27%	-5.82%	-5.82%	-3.08%	8.68%	-3.77%	6.08%	5.06%	4.01%
Alerian MLP	2.56%	4.14%	-10.05%	-10.05%	1.27%	13.47%	18.82%	32.46%	5.47%	6.89%
Bloomberg Commodity	-0.39%	3.09%	-4.88%	-4.88%	3.57%	3.00%	-4.42%	12.90%	2.09%	
US Dollar Index	-0.47%	-3.42%	-4.20%	-4.20%	-7.00%	-0.82%	4.59%	2.76%	1.98%	
Interest Rates	4/14/25	4/7/25	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	3.84%	3.73%	4.25%	4.23%	4.41%	0.73%	0.13%	1.58%	2.48%	
US Treasury Constant Maturity - 5 Year	4.02%	3.82%	4.38%	3.84%	3.99%	1.26%	0.36%	1.69%	2.51%	
US Treasury Constant Maturity - 10 Year	4.38%	4.15%	4.58%	3.88%	3.88%	1.52%	0.93%	1.92%	2.69%	
Germany Benchmark Bond - 10 Year	2.52%	2.62%	2.35%	1.94%	2.53%	-0.18%	-0.58%	-0.19%	0.24%	
Japan Benchmark Bond - 10 Year	1.33%	1.11%	1.09%	0.59%	0.42%	0.07%	0.02%	-0.02%	0.01%	
Mexico Benchmark Bond - 10 Year	9.68%	9.42%	10.41%	8.95%	9.02%	7.56%	5.55%	6.84%	8.71%	
30 Year Fixed-Rate Mortgages, Average, US	6.88%	6.66%	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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