



| Equities                                  | 1 Day   | 1 Week  | MTD      | QTD      | YTD      | 1 Year   | 3 Years  | 5 Years  | 10 Years | Yield |
|---|---------|---------|----------|----------|----------|----------|----------|----------|----------|-------|
| S&P 500                                   | -2.35%  | -4.56%  | -8.02%   | -8.02%   | -11.95%  | 5.24%    | 7.11%    | 15.23%   | 11.36%   | 1.42% |
| Communications Services                   | -2.21%  | -5.33%  | -7.63%   | -7.63%   | -13.37%  | 6.14%    | 12.36%   | 14.29%   | 9.18%    | 0.87% |
| Consumer Discretionary                    | -2.86%  | -5.91%  | -9.33%   | -9.33%   | -21.84%  | 4.12%    | 1.20%    | 10.81%   | 10.19%   | 0.75% |
| Consumer Staples                          | -1.25%  | -0.90%  | -0.09%   | -0.09%   | 5.14%    | 14.92%   | 4.62%    | 11.27%   | 8.72%    | 2.24% |
| Energy                                    | -2.52%  | 0.40%   | -14.79%  | -14.79%  | -6.09%   | -13.22%  | 4.54%    | 24.77%   | 4.02%    | 3.70% |
| Financials                                | -2.14%  | -3.18%  | -8.35%   | -8.35%   | -5.12%   | 14.82%   | 9.01%    | 18.75%   | 11.03%   | 1.63% |
| Health Care                               | -2.13%  | -4.31%  | -9.14%   | -9.14%   | -3.20%   | -2.95%   | 0.18%    | 8.26%    | 7.85%    | 1.80% |
| Industrials                               | -2.24%  | -3.55%  | -6.54%   | -6.54%   | -6.72%   | 3.26%    | 8.49%    | 17.26%   | 9.90%    | 1.46% |
| Materials                                 | -1.62%  | -2.32%  | -7.13%   | -7.13%   | -4.52%   | -8.45%   | -1.52%   | 13.01%   | 7.08%    | 2.08% |
| Real Estate                               | -2.08%  | -0.40%  | -5.36%   | -5.36%   | -1.97%   | 14.24%   | -4.26%   | 7.48%    | 6.15%    | 3.43% |
| Technology                                | -2.72%  | -6.86%  | -8.94%   | -8.94%   | -20.46%  | 5.21%    | 13.25%   | 20.86%   | 19.26%   | 0.77% |
| Utilities                                 | -2.39%  | -2.27%  | -3.71%   | -3.71%   | 1.04%    | 19.66%   | 3.43%    | 9.23%    | 9.11%    | 3.01% |
| DJIA                                      | -2.44%  | -5.77%  | -9.03%   | -9.03%   | -9.82%   | 2.28%    | 5.22%    | 12.84%   | 10.23%   | 1.80% |
| NASDAQ                                    | -2.55%  | -5.71%  | -8.24%   | -8.24%   | -17.66%  | 4.58%    | 7.24%    | 14.77%   | 12.65%   | #N/A  |
| Russell 3000                              | -2.35%  | -4.30%  | -8.02%   | -8.02%   | -12.36%  | 4.53%    | 6.37%    | 14.86%   | 10.68%   | 1.42% |
| Russell 1000 Growth                       | -2.75%  | -5.63%  | -7.87%   | -7.87%   | -17.06%  | 5.76%    | 9.51%    | 16.47%   | 13.95%   | 0.67% |
| Russell 1000 Value                        | -1.94%  | -2.97%  | -8.05%   | -8.05%   | -6.08%   | 3.47%    | 3.61%    | 13.12%   | 7.73%    | 2.21% |
| Russell Midcap                            | -2.32%  | -2.71%  | -7.65%   | -7.65%   | -10.79%  | 1.32%    | 2.48%    | 13.13%   | 7.84%    | 1.72% |
| Russell 2500                              | -2.34%  | -2.58%  | -8.51%   | -8.51%   | -15.37%  | -3.78%   | -0.26%   | 11.96%   | 6.41%    | 1.65% |
| Russell 2000                              | -2.14%  | -2.14%  | -8.49%   | -8.49%   | -17.16%  | -4.20%   | -1.15%   | 10.63%   | 5.24%    | 1.57% |
| MSCI AC World                             | -1.29%  | -2.15%  | -5.22%   | -5.22%   | -6.37%   | 7.41%    | 6.63%    | 13.48%   | 8.45%    | 1.84% |
| MSCI AC World ex USA                      | 0.56%   | 2.05%   | -0.19%   | -0.19%   | 5.16%    | 11.12%   | 5.97%    | 10.97%   | 4.98%    | 2.65% |
| MSCI EAFE                                 | 0.77%   | 2.60%   | 0.79%    | 0.79%    | 7.85%    | 11.39%   | 7.68%    | 12.24%   | 5.60%    | 2.78% |
| MSCI Europe                               | 1.25%   | 2.47%   | 1.08%    | 1.08%    | 11.83%   | 12.59%   | 8.72%    | 14.00%   | 6.06%    | 2.83% |
| MSCI Japan                                | -0.44%  | 3.25%   | 0.35%    | 0.35%    | 0.85%    | 6.57%    | 8.15%    | 8.96%    | 5.16%    | 2.21% |
| MSCI EM (Emerging Markets)                | 0.31%   | 1.14%   | -2.48%   | -2.48%   | 0.45%    | 9.91%    | 2.66%    | 7.05%    | 3.13%    | 2.34% |
| MSCI EM Asia                              | 0.24%   | 1.09%   | -3.04%   | -3.04%   | -1.66%   | 11.27%   | 3.10%    | 6.37%    | 3.75%    | 1.96% |
| MSCI EM Eastern Europe                    | 1.52%   | 3.10%   | 2.77%    | 2.77%    | 31.84%   | 28.62%   | 19.71%   | -10.44%  | -4.85%   | #N/A  |
| MSCI EM Latin America                     | 1.06%   | 2.12%   | 0.61%    | 0.61%    | 13.51%   | -7.83%   | -0.06%   | 11.93%   | 2.33%    | 4.36% |
| Fixed Income                              | 1 Day   | 1 Week  | MTD      | QTD      | YTD      | 1 Year   | 3 Years  | 5 Years  | 10 Years | Yield |
| Bloomberg US Aggregate                    | -0.54%  | -0.26%  | -1.32%   | -1.32%   | 1.42%    | 5.97%    | 1.30%    | -1.00%   | 1.30%    | 4.76% |
| Bloomberg Municipal State GO (10 Y)       | -0.25%  | 0.12%   | -1.42%   | -1.42%   | -1.41%   | -0.19%   | 1.83%    | 0.52%    | 2.12%    | 3.85% |
| Barclays US High Yield                    | -0.35%  | 0.22%   | -1.52%   | -1.52%   | -0.53%   | 7.79%    | 5.23%    | 6.13%    | 4.70%    | 8.35% |
| Bloomberg Global Aggregate USD            | -0.52%  | -0.22%  | -1.30%   | -1.30%   | 1.42%    | 6.02%    | 1.44%    | -0.81%   | 1.40%    | 4.80% |
| Bbg EM Gov't Diversified                  | 0.62%   | 1.11%   | 2.46%    | 2.46%    | 6.00%    | 9.43%    | 3.44%    | 1.02%    | 1.03%    | 6.44% |
| Other                                     | 1 Day   | 1 Week  | MTD      | QTD      | YTD      | 1 Year   | 3 Years  | 5 Years  | 10 Years | Yield |
| FTSE NAREIT                               | -2.03%  | -0.23%  | -6.03%   | -6.03%   | -3.30%   | 11.74%   | -4.70%   | 7.66%    | 5.08%    | 4.01% |
| Alerian MLP                               | -2.93%  | -0.56%  | -10.55%  | -10.55%  | 0.71%    | 11.42%   | 18.06%   | 31.29%   | 5.47%    | 6.92% |
| Bloomberg Commodity                       | -0.68%  | 1.19%   | -3.75%   | -3.75%   | 4.80%    | 3.98%    | -3.78%   | 14.48%   | 2.10%    |       |
| US Dollar Index                           | -1.06%  | -1.28%  | -5.43%   | -5.43%   | -8.19%   | -2.29%   | 4.04%    | 2.19%    | 1.93%    |       |
| Interest Rates                            | 4/21/25 | 4/14/25 | 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    | 3.75%   | 3.84%   | 4.25%    | 4.23%    | 4.41%    | 0.73%    | 0.13%    | 1.58%    | 2.48%    |       |
| US Treasury Constant Maturity - 5 Year    | 3.97%   | 4.02%   | 4.38%    | 3.84%    | 3.99%    | 1.26%    | 0.36%    | 1.69%    | 2.51%    |       |
| US Treasury Constant Maturity - 10 Year   | 4.42%   | 4.38%   | 4.58%    | 3.88%    | 3.88%    | 1.52%    | 0.93%    | 1.92%    | 2.69%    |       |
| Germany Benchmark Bond - 10 Year          | 2.47%   | 2.52%   | 2.35%    | 1.94%    | 2.53%    | -0.18%   | -0.58%   | -0.19%   | 0.24%    |       |
| Japan Benchmark Bond - 10 Year            | 1.28%   | 1.33%   | 1.09%    | 0.59%    | 0.42%    | 0.07%    | 0.02%    | -0.02%   | 0.01%    |       |
| Mexico Benchmark Bond - 10 Year           | 9.38%   | 9.42%   | 10.41%   | 8.95%    | 9.02%    | 7.56%    | 5.55%    | 6.84%    | 8.71%    |       |
| 30 Year Fixed-Rate Mortgages, Average, US | 6.90%   | 6.88%   | 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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