

## MARKET STATISTICS

### INDEX RETURNS

| EQUITIES (%) |      |       |       |
|--------------|------|-------|-------|
|              | WTD  | MTD   | YTD   |
| S&P 500      | 1.70 | -0.31 | 14.45 |
| DJIA         | 1.56 | -0.40 | 10.03 |
| Nasdaq       | 2.14 | 0.10  | 18.08 |
| Russell 1000 | 1.68 | -0.35 | 14.18 |
| Russell 2000 | 2.40 | 0.67  | 11.12 |
| Russell 3000 | 1.71 | -0.31 | 14.03 |

| FOREIGN (%)    |      |      |       |
|----------------|------|------|-------|
|                | WTD  | MTD  | YTD   |
| MSCI ACWI      | 1.25 | 0.01 | 18.89 |
| MSCI ACWI xUSA | 1.43 | 1.60 | 28.72 |
| MSCI EAFE      | 1.64 | 1.36 | 27.49 |
| MSCI EM        | 0.97 | 2.48 | 31.35 |

| FIXED INCOME (%)         |      |       |      |
|--------------------------|------|-------|------|
|                          | WTD  | MTD   | YTD  |
| US Intermediate Gov/Cred | 0.43 | 0.82  | 6.57 |
| U.S. Aggregate           | 0.56 | 1.14  | 7.34 |
| US Corp High Yield       | 0.56 | -0.06 | 7.15 |
| Municipal Bond           | 0.42 | 0.95  | 3.62 |

| OTHERS (%)               |       |       |       |
|--------------------------|-------|-------|-------|
|                          | WTD   | MTD   | YTD   |
| DJ Eqty REIT TOT RE IDX  | 3.48  | 0.12  | 4.71  |
| Alerian MLP Index        | 1.80  | -3.20 | 2.36  |
| S&P GSCI Index Spot Indx | 0.32  | -1.51 | -1.45 |
| Dollar Index Spot        | -0.49 | 0.73  | -9.21 |

### RUSSELL STYLE

| RETURNS YTD (%) |       |       |        |
|-----------------|-------|-------|--------|
|                 | VALUE | CORE  | GROWTH |
| Large Cap       | 11.19 | 14.18 | 16.89  |
| Mid Cap         | 7.92  | 8.96  | 11.82  |
| Small Cap       | 9.01  | 11.12 | 13.11  |

### ECONOMIC SCORECARD\*

| SELECTED RELEASES |          |        |            |
|-------------------|----------|--------|------------|
|                   | ESTIMATE | ACTUAL | DIFFERENCE |
|                   |          |        |            |
|                   |          |        |            |
|                   |          |        |            |

\*Due to the government shutdown, there is no economic data this week.

### COMMODITY PRICES

| ALTERNATIVES             |            |            |            |
|--------------------------|------------|------------|------------|
|                          | 10/17/2025 | 9/30/2025  | 12/31/2024 |
| Generic Crude Oil Future | \$57.62    | \$62.37    | \$71.72    |
| Generic Gold Future      | \$4,234.90 | \$3,840.80 | \$2,641.00 |
| Dollar Index Spot        | \$98.49    | \$97.78    | \$108.49   |
| Euro Spot                | \$1.17     | \$1.17     | \$1.04     |

### S&P 500

| SECTOR RETURNS (%)     |       |
|------------------------|-------|
|                        | YTD   |
| Discretionary          | 2.89  |
| Staples                | 5.84  |
| Energy                 | 3.36  |
| Financials             | 9.17  |
| Health Care            | 5.58  |
| Industrials            | 16.27 |
| Info Tech              | 22.79 |
| Materials              | 7.19  |
| Real Estate            | 6.05  |
| Communication Services | 24.84 |
| Utilities              | 23.53 |