

MARKET STATISTICS
INDEX RETURNS
EQUITIES (%)

	WTD	MTD	YTD
S&P 500	1.40	1.28	19.30
DJIA	1.20	2.28	16.47
Nasdaq	1.22	1.03	23.00
Russell 1000	1.34	1.25	18.81
Russell 2000	0.18	1.45	15.10
Russell 3000	1.29	1.26	18.63

FOREIGN (%)

	WTD	MTD	YTD
MSCI ACWI	1.41	1.84	23.83
MSCI ACWI xUSA	1.41	2.87	32.99
MSCI EAFE	1.23	3.09	32.13
MSCI EM	1.70	2.07	33.06

FIXED INCOME (%)

	WTD	MTD	YTD
US Intermediate Gov/Cred	0.05	-0.01	6.86
U.S. Aggregate	0.19	-0.16	7.29
US Corp High Yield	0.17	0.38	8.42
Municipal Bond	0.06	-0.02	4.13

OTHERS (%)

	WTD	MTD	YTD
DJ Eqty REIT TOT RE IDX	1.17	-1.83	2.73
Alerian MLP Index	0.41	-2.05	9.28
S&P GSCI Index Spot Indx	2.27	-0.12	0.88
Dollar Index Spot	-0.59	-1.45	-9.65

RUSSELL STYLE
RETURNS YTD (%)

	VALUE	CORE	GROWTH
Large Cap	17.03	18.81	20.33
Mid Cap	12.64	12.34	10.85
Small Cap	14.54	15.10	15.63

ECONOMIC SCORECARD
SELECTED RELEASES

	ESTIMATE	ACTUAL	DIFFERENCE
GDP Annualized QoQ	3.3%	4.3%	1.0%
GDP Price Index	2.7%	3.8%	1.1%
Core PCE Price Index QoQ	2.9%	2.9%	0.0%
Durable Goods Orders	-1.5%	-2.2%	-0.7%
Initial Jobless Claims	224k	214k	-10k
Continuing Claims	1900k	1923k	23k

COMMODITY PRICES
ALTERNATIVES

	12/26/2025	11/30/2025	12/31/2024
Generic Crude Oil Future	\$56.86	\$58.55	\$71.72
Generic Gold Future	\$4,535.30	\$4,218.30	\$2,641.00
Dollar Index Spot	\$98.01	\$99.46	\$108.49
Euro Spot	\$1.18	\$1.16	\$1.04

S&P 500
SECTOR RETURNS (%)

	YTD
Discretionary	8.27
Staples	4.40
Energy	7.41
Financials	16.74
Health Care	15.48
Industrials	20.89
Info Tech	26.00
Materials	12.55
Real Estate	3.60
Communication Services	33.88
Utilities	16.31