

MARKET STATISTICS
INDEX RETURNS
EQUITIES (%)

	WTD	MTD	YTD
S&P 500	-1.90	-5.33	-4.70
DJIA	-2.11	-6.77	-4.79
Nasdaq	-2.07	-4.45	-6.74
Russell 1000	-1.87	-5.45	-4.68
Russell 2000	-1.68	-7.27	-1.49
Russell 3000	-1.86	-5.54	-4.54

FOREIGN (%)

	WTD	MTD	YTD
MSCI ACWI	-0.41	-5.70	-1.60
MSCI ACWI xUSA	-0.53	-8.76	1.59
MSCI EAFE	-0.89	-9.35	-0.17
MSCI EM	0.46	-8.20	5.43

FIXED INCOME (%)

	WTD	MTD	YTD
US Intermediate Gov/Cred	0.04	-1.18	0.01
U.S. Aggregate	0.28	-1.60	0.12
US Corp High Yield	0.08	-1.12	-0.43
Municipal Bond	0.03	-1.41	0.76

OTHERS (%)

	WTD	MTD	YTD
DJ Eqty REIT TOT RE IDX	-3.88	-7.15	2.67
Alerian MLP Index	1.39	1.80	17.75
S&P GSCI Index Spot Indx	0.65	19.10	32.65
Dollar Index Spot	-0.80	2.00	1.26

RUSSELL STYLE
RETURNS YTD (%)

	VALUE	CORE	GROWTH
Large Cap	0.80	-4.68	-9.54
Mid Cap	1.49	-0.38	-6.34
Small Cap	1.51	-1.49	-4.21

ECONOMIC SCORECARD
SELECTED RELEASES

	ESTIMATE	ACTUAL	DIFFERENCE
FOMC Rate Decision (Upper Bound)	3.8%	3.8%	0.0%
PPI Ex Food and Energy YoY	3.7%	3.9%	0.2%
Factory Orders	0.1%	0.1%	0.0%
Durable Goods Orders	0.0%	0.0%	0.0%
Initial Jobless Claims	215k	205k	-10k
Continuing Claims	1852k	1857k	5k

COMMODITY PRICES
ALTERNATIVES

	3/20/2026	2/28/2026	12/31/2025
Generic Crude Oil Future	\$98.32	\$67.02	\$57.42
Generic Gold Future	\$4,505.60	\$5,247.90	\$4,341.10
Dollar Index Spot	\$99.56	\$97.61	\$98.32
Euro Spot	\$1.16	\$1.18	\$1.17

S&P 500
SECTOR RETURNS (%)

	YTD
Discretionary	-10.42
Staples	5.60
Energy	32.77
Financials	-10.49
Health Care	-6.11
Industrials	4.23
Info Tech	-8.36
Materials	3.02
Real Estate	1.46
Communication Services	-4.35
Utilities	4.56