

MARKET STATISTICS
INDEX RETURNS
EQUITIES (%)

	WTD	MTD	YTD
S&P 500	0.91	0.29	5.99
DJIA	0.55	-0.31	3.49
Nasdaq	1.12	0.89	8.25
Russell 1000	0.78	0.26	5.76
Russell 2000	0.93	0.46	13.84
Russell 3000	0.79	0.27	6.12

FOREIGN (%)

	WTD	MTD	YTD
MSCI ACWI	0.46	0.00	6.80
MSCI ACWI xUSA	0.22	0.00	9.10
MSCI EAFE	0.56	0.00	6.41
MSCI EM	-0.61	0.00	14.61

FIXED INCOME (%)

	WTD	MTD	YTD
US Intermediate Gov/Cred	-0.30	0.00	0.19
U.S. Aggregate	-0.50	0.00	0.07
US Corp High Yield	-0.09	0.00	1.19
Municipal Bond	-0.35	0.00	0.97

OTHERS (%)

	WTD	MTD	YTD
DJ Eqty REIT TOT RE IDX	1.19	-0.21	12.93
Alerian MLP Index	3.07	-1.57	20.13
S&P GSCI Index Spot Indx	5.46	0.00	40.09
Dollar Index Spot	-0.31	0.17	-0.10

RUSSELL STYLE
RETURNS YTD (%)

	VALUE	CORE	GROWTH
Large Cap	10.20	5.76	1.63
Mid Cap	11.34	8.54	-0.40
Small Cap	15.41	13.84	12.39

ECONOMIC SCORECARD
SELECTED RELEASES

	ESTIMATE	ACTUAL	DIFFERENCE
GDP Annualized QoQ	2.3%	2.0%	-0.3%
Core PCE Price Index QoQ	4.1%	4.3%	0.2%
Durable Goods Orders	0.5%	0.8%	0.3%
ISM Manufacturing	53.2	52.7	-0.5
Initial Jobless Claims	212k	189k	-23k
Continuing Claims	1815k	1785k	-30k

COMMODITY PRICES
ALTERNATIVES

	5/1/2026	4/30/2026	12/31/2025
Generic Crude Oil Future	\$102.55	\$105.07	\$57.42
Generic Gold Future	\$4,623.20	\$4,629.60	\$4,341.10
Dollar Index Spot	\$98.22	\$98.06	\$98.32
Euro Spot	\$1.17	\$1.17	\$1.17

S&P 500
SECTOR RETURNS (%)

	YTD
Discretionary	1.98
Staples	10.91
Energy	31.71
Financials	-4.79
Health Care	-5.80
Industrials	11.86
Info Tech	8.25
Materials	12.33
Real Estate	11.49
Communication Services	10.30
Utilities	9.76