

MARKET STATISTICS

INDEX RETURNS

EQUITIES (%)			
	WTD	MTD	YTD
S&P 500	1.43	5.26	11.24
DJIA	0.90	2.93	6.86
Nasdaq	2.39	8.43	16.33
Russell 1000	1.48	5.09	10.86
Russell 2000	1.75	4.35	18.25
Russell 3000	1.49	5.06	11.18

FOREIGN (%)			
	WTD	MTD	YTD
MSCI ACWI	1.09	4.65	11.77
MSCI ACWI xUSA	0.88	4.00	13.47
MSCI EAFE	0.22	2.39	8.96
MSCI EM	2.29	7.99	23.76

FIXED INCOME (%)			
	WTD	MTD	YTD
US Intermediate Gov/Cred	0.48	0.01	0.19
U.S. Aggregate	0.73	0.21	0.27
US Corp High Yield	0.43	0.37	1.56
Municipal Bond	0.80	0.14	1.11

OTHERS (%)			
	WTD	MTD	YTD
DJ Eqty REIT TOT RE IDX	-1.00	0.04	13.22
Alerian MLP Index	-6.10	-2.88	18.53
S&P GSCI Index Spot Indx	-3.93	-8.53	28.15
Dollar Index Spot	-0.34	0.86	0.59

RUSSELL STYLE

RETURNS YTD (%)			
	VALUE	CORE	GROWTH
Large Cap	13.63	10.86	8.22
Mid Cap	14.10	11.81	4.47
Small Cap	18.43	18.25	18.05

ECONOMIC SCORECARD

SELECTED RELEASES			
	ESTIMATE	ACTUAL	DIFFERENCE
Core PCE Price Index YoY	3.3%	3.3%	0.0%
Durable Goods Orders	4.0%	7.9%	3.9%
Cap Goods Orders Nondef Ex Air	0.4%	-1.1%	-1.5%
New Home Sales MoM	-3.2%	-6.2%	-3.0%
Initial Jobless Claims	211k	215k	4k
Continuing Claims	1784k	1786k	2k

COMMODITY PRICES

ALTERNATIVES			
	5/29/2026	4/30/2026	12/31/2025
Generic Crude Oil Future	\$87.93	\$105.07	\$57.42
Generic Gold Future	\$4,545.00	\$4,629.60	\$4,341.10
Dollar Index Spot	\$98.90	\$98.06	\$98.32
Euro Spot	\$1.17	\$1.17	\$1.17

S&P 500

SECTOR RETURNS (%)	
	YTD
Discretionary	4.11
Staples	7.48
Energy	26.04
Financials	-5.45
Health Care	-2.96
Industrials	11.97
Info Tech	23.81
Materials	11.92
Real Estate	10.57
Communication Services	9.30
Utilities	4.80