



MARKET STATISTICS

INDEX RETURNS

EQUITIES (%)

	WTD	MTD	YTD
S&P 500	-0.31	2.94	14.03
DJIA	-0.15	1.67	10.11
Nasdaq	-0.65	4.85	17.04
Russell 1000	-0.41	2.84	13.89
Russell 2000	-0.59	2.97	10.22
Russell 3000	-0.42	2.84	13.72

FOREIGN (%)

	WTD	MTD	YTD
MSCI ACWI	-0.84	2.42	17.46
MSCI ACWI xUSA	-0.67	2.43	25.21
MSCI EAFE	-1.02	0.25	23.71
MSCI EM	0.22	6.98	27.94

FIXED INCOME (%)

	WTD	MTD	YTD
US Intermediate Gov/Cred	-0.26	0.24	5.51
U.S. Aggregate	-0.26	0.89	5.92
US Corp High Yield	-0.25	0.68	7.07
Municipal Bond	-0.37	2.24	2.56

OTHERS (%)

	WTD	MTD	YTD
DJ Eqty REIT TOT RE IDX	0.76	-0.20	3.92
Alerian MLP Index	1.58	-2.30	7.28
S&P GSCI Index Spot Indx	2.23	1.53	1.54
Dollar Index Spot	0.53	0.40	-9.52

RUSSELL STYLE

RETURNS YTD (%)

	VALUE	CORE	GROWTH
Large Cap	11.26	13.89	16.24
Mid Cap	8.86	9.96	12.93
Small Cap	8.99	10.22	11.29

ECONOMIC SCORECARD

SELECTED RELEASES

	ESTIMATE	ACTUAL	DIFFERENCE
GDP Revision Annualized QoQ	3.3%	3.8%	0.5%
Core PCE Price Index YoY	2.9%	2.9%	0.0%
Durable Goods Orders	-0.3%	2.9%	3.2%
Cap Goods Orders Nondef Ex Air	0.0%	0.6%	0.6%
Initial Jobless Claims	233k	218k	-15k
Continuing Claims	1932k	1926k	-6k

COMMODITY PRICES

ALTERNATIVES

	9/26/2025	8/31/2025	12/31/2024
Generic Crude Oil Future	\$65.34	\$64.01	\$71.72
Generic Gold Future	\$3,761.60	\$3,487.20	\$2,641.00
Dollar Index Spot	\$98.16	\$97.77	\$108.49
Euro Spot	\$1.17	\$1.17	\$1.04

S&P 500

SECTOR RETURNS (%)

	YTD
Discretionary	5.31
Staples	3.47
Energy	10.30
Financials	12.66
Health Care	-0.13
Industrials	16.92
Info Tech	20.67
Materials	8.22
Real Estate	5.54
Communication Services	25.67
Utilities	17.09