



## MARKET STATISTICS

### INDEX RETURNS

EQUITIES (%)			
	WTD	MTD	YTD
S&P 500	1.57	1.78	1.78
DJIA	2.32	3.03	3.03
Nasdaq	1.88	1.85	1.85
Russell 1000	1.64	1.92	1.92
Russell 2000	4.62	5.79	5.79
Russell 3000	1.77	2.09	2.09

FOREIGN (%)			
	WTD	MTD	YTD
MSCI ACWI	0.96	1.48	1.48
MSCI ACWI xUSA	1.05	2.04	2.04
MSCI EAFE	0.86	1.47	1.47
MSCI EM	1.62	3.47	3.47

FIXED INCOME (%)			
	WTD	MTD	YTD
US Intermediate Gov/Cred	0.06	-0.03	-0.03
U.S. Aggregate	0.13	-0.07	-0.07
US Corp High Yield	0.30	0.30	0.30
Municipal Bond	0.64	0.69	0.69

OTHERS (%)			
	WTD	MTD	YTD
DJ Eqty REIT TOT RE IDX	0.93	1.11	1.11
Alerian MLP Index	1.32	2.29	2.29
S&P GSCI Index Spot Indx	1.35	1.25	1.25
Dollar Index Spot	0.72	0.83	0.83

### RUSSELL STYLE

RETURNS YTD (%)			
	VALUE	CORE	GROWTH
Large Cap	3.44	1.92	0.63
Mid Cap	4.10	3.84	3.02
Small Cap	5.51	5.79	6.04

### ECONOMIC SCORECARD

SELECTED RELEASES			
	ESTIMATE	ACTUAL	DIFFERENCE
Change in Nonfarm Payrolls	70k	50k	-20k
Unemployment Rate	4.5%	4.4%	-0.1%
Average Hourly Earnings YoY	3.6%	3.8%	0.2%
Labor Force Participation Rate	62.4%	62.4%	0.0%
ISM Manufacturing	48	48	-1
ISM Services Index	52	54	2

### COMMODITY PRICES

ALTERNATIVES			
	1/9/2026	12/31/2025	12/31/2025
Generic Crude Oil Future	\$58.85	\$57.42	\$57.42
Generic Gold Future	\$4,518.30	\$4,341.10	\$4,341.10
Dollar Index Spot	\$99.14	\$98.32	\$98.32
Euro Spot	\$1.16	\$1.17	\$1.17

### S&P 500

SECTOR RETURNS (%)	
	YTD
Discretionary	4.57
Staples	1.98
Energy	4.26
Financials	1.65
Health Care	1.61
Industrials	4.44
Info Tech	0.08
Materials	6.47
Real Estate	0.47
Communication Services	1.99
Utilities	-0.41