



MARKET STATISTICS

INDEX RETURNS

EQUITIES (%)

| | WTD | MTD | YTD |
|--------------|-------|-------|-------|
| S&P 500 | -2.02 | -2.00 | -1.35 |
| DJIA | -3.01 | -2.92 | -0.86 |
| Nasdaq | -1.24 | -1.23 | -3.59 |
| Russell 1000 | -2.09 | -2.07 | -1.27 |
| Russell 2000 | -4.07 | -4.04 | 1.94 |
| Russell 3000 | -2.18 | -2.16 | -1.13 |

FOREIGN (%)

| | WTD | MTD | YTD |
|----------------|-------|-------|------|
| MSCI ACWI | -2.71 | -2.67 | 1.55 |
| MSCI ACWI xUSA | -5.98 | -5.92 | 4.75 |
| MSCI EAFE | -6.17 | -6.10 | 3.42 |
| MSCI EM | -6.65 | -6.64 | 7.22 |

FIXED INCOME (%)

| | WTD | MTD | YTD |
|--------------------------|-------|-------|------|
| US Intermediate Gov/Cred | -0.62 | -0.62 | 0.59 |
| U.S. Aggregate | -0.86 | -0.86 | 0.87 |
| US Corp High Yield | -0.09 | -0.09 | 0.60 |
| Municipal Bond | -0.71 | -0.71 | 1.47 |

OTHERS (%)

| | WTD | MTD | YTD |
|--------------------------|-------|-------|-------|
| DJ Eqty REIT TOT RE IDX | -2.08 | -2.08 | 8.27 |
| Alerian MLP Index | 1.37 | 1.37 | 17.26 |
| S&P GSCI Index Spot Indx | 10.08 | 10.08 | 22.59 |
| Dollar Index Spot | 1.33 | 1.33 | 0.59 |

RUSSELL STYLE

RETURNS YTD (%)

| | VALUE | CORE | GROWTH |
|-----------|-------|-------|--------|
| Large Cap | 3.54 | -1.27 | -5.50 |
| Mid Cap | 4.82 | 3.11 | -2.36 |
| Small Cap | 5.12 | 1.94 | -0.95 |

ECONOMIC SCORECARD

SELECTED RELEASES

| | ESTIMATE | ACTUAL | DIFFERENCE |
|----------------------------|----------|--------|------------|
| Change in Nonfarm Payrolls | 55k | -92k | -147k |
| Unemployment Rate | 4.3% | 4.4% | 0.1% |
| ISM Manufacturing | 51.5 | 52.4 | 0.9 |
| ISM Services Index | 53.5 | 56.1 | 2.6 |
| Initial Jobless Claims | 215k | 213k | -2k |
| Continuing Claims | 1845k | 1868k | 23k |

COMMODITY PRICES

ALTERNATIVES

| | 3/6/2026 | 2/28/2026 | 12/31/2025 |
|--------------------------|------------|------------|------------|
| Generic Crude Oil Future | \$91.04 | \$67.02 | \$57.42 |
| Generic Gold Future | \$5,173.60 | \$5,247.90 | \$4,341.10 |
| Dollar Index Spot | \$98.90 | \$97.61 | \$98.32 |
| Euro Spot | \$1.16 | \$1.18 | \$1.17 |

S&P 500

SECTOR RETURNS (%)

| | YTD |
|------------------------|-------|
| Discretionary | -5.12 |
| Staples | 10.56 |
| Energy | 26.47 |
| Financials | -7.75 |
| Health Care | -1.27 |
| Industrials | 9.60 |
| Info Tech | -5.84 |
| Materials | 9.48 |
| Real Estate | 6.86 |
| Communication Services | -1.71 |
| Utilities | 9.51 |