



Benchmark Review

April 30, 2021

	1 Month	3 Months	YTD	1 Year	3 Year	5 Year	7 Year	10 Year	Std Dev 3 Year	2020	2019	2018	2017	2016	2015	2014
U.S. Equity Market Indexes																
DJ Industrial Average	2.78	13.52	11.30	42.12	14.52	16.48	13.98	12.95	18.81	9.72	25.34	-3.48	28.11	16.50	0.21	10.04
NASDAQ Composite Index	5.43	7.01	8.55	58.30	26.72	25.23	20.18	18.46	20.60	44.92	36.69	-2.84	29.64	8.87	6.96	14.75
Russell 1000	5.38	12.54	11.61	49.48	19.24	17.76	14.66	14.23	19.11	20.96	31.43	-4.78	21.69	12.05	0.92	13.24
Russell 1000 Growth	6.80	8.61	7.81	51.41	25.37	22.88	18.94	17.02	19.59	38.49	36.39	-1.51	30.21	7.08	5.67	13.05
Russell 1000 Value	4.00	16.77	15.70	45.92	12.30	12.15	9.96	11.13	20.03	2.80	26.54	-8.27	13.66	17.34	-3.83	13.45
Russell 2000	2.10	9.55	15.07	74.91	15.23	16.48	12.40	11.63	25.70	19.96	25.52	-11.01	14.65	21.31	-4.41	4.89
Russell 2000 Growth	2.18	2.23	7.16	69.15	17.97	18.89	13.86	12.86	25.52	34.63	28.48	-9.31	22.17	11.32	-1.38	5.60
Russell 2000 Value	2.02	17.44	23.62	78.96	11.68	13.54	10.47	10.10	26.97	4.63	22.39	-12.86	7.84	31.74	-7.47	4.22
Russell 2500	4.00	12.60	15.36	71.95	16.76	16.50	12.75	12.32	24.56	19.99	27.77	-10.00	16.81	17.59	-2.90	7.07
Russell 3000	5.15	12.33	11.83	50.92	18.95	17.67	14.49	14.03	19.43	20.89	31.02	-5.24	21.13	12.74	0.48	12.56
Russell Micro Cap	0.26	8.75	24.21	91.72	16.19	17.41	12.72	12.07	28.10	20.96	22.43	-13.08	13.17	20.37	-5.16	3.65
S&P 500	5.34	12.98	11.84	45.98	18.67	17.42	14.55	14.17	18.52	18.40	31.49	-4.38	21.83	11.96	1.38	13.69
S&P 500 Equal Weighted	4.74	17.72	16.77	57.05	16.53	15.53	12.75	13.27	21.68	12.83	29.24	-7.64	18.90	14.80	-2.20	14.49
S&P MidCap 400	4.50	16.82	18.58	67.90	15.18	15.10	12.26	12.11	23.78	13.66	26.20	-11.08	16.24	20.74	-2.18	9.77
S&P MidCap 400 Growth	4.16	11.02	13.07	61.70	16.18	16.24	13.22	12.41	21.64	22.77	26.29	-10.34	19.92	14.77	2.02	7.57
S&P MidCap 400 Value	4.81	22.71	24.12	73.48	13.58	13.45	10.82	11.52	26.71	3.73	26.08	-11.88	12.32	26.53	-6.65	12.10
S&P Preferred Stock	1.29	3.02	2.08	17.15	7.89	6.21	5.95	6.38	11.67	7.97	17.64	-4.25	9.11	1.94	5.47	14.07

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Fixed Income Market Indexes																
BBgBarc U.S. Agg. Bond	0.79	-1.91	-2.61	-0.27	5.19	3.19	3.11	3.39	3.50	7.51	8.72	0.01	3.54	2.65	0.55	5.97
BBgBarc Global Agg. Bond	1.26	-2.39	-3.25	3.95	3.79	2.64	3.01	2.05	4.44	9.20	6.84	-1.20	7.39	2.09	-3.15	0.59
BBgBarc U.S. Govt/Credit	0.88	-2.42	-3.44	-0.46	5.60	3.45	3.33	3.66	4.29	8.93	9.71	-0.42	4.00	3.05	0.15	6.01
BBgBarc Intermediate U.S. Corporate	0.74	-1.09	-1.47	5.13	5.87	3.96	3.76	4.05	4.86	7.47	10.14	-0.23	3.92	4.04	1.08	4.35
BBgBarc U.S. Govt/Credit Interm.	0.50	-1.10	-1.37	1.09	4.71	2.80	2.73	2.81	2.35	6.43	6.80	0.88	2.14	2.08	1.07	3.13
BBgBarc U.S. Credit	1.06	-2.27	-3.44	4.25	6.65	4.63	4.32	4.77	6.62	9.35	13.80	-2.11	6.18	5.63	-0.77	7.53
BBgBarc U.S. Treasury	0.75	-2.60	-3.53	-4.32	4.63	2.40	2.47	2.86	4.47	8.00	6.86	0.86	2.31	1.04	0.84	5.05
BBgBarc U.S. 3 Year Treasury	0.12	-0.20	-0.21	0.19	3.67	1.94	1.87	1.63	1.80	4.63	4.35	1.26	0.52	0.86	0.87	0.92
BBgBarc U.S. 5 Year Treasury	0.56	-1.64	-1.91	-1.63	4.77	2.13	2.20	2.49	3.29	7.26	5.82	1.42	0.67	0.48	1.31	2.89
BBgBarc U.S. 10 Year Treasury	1.16	-4.53	-5.94	-7.69	5.59	2.01	2.30	3.68	6.62	10.61	8.90	-0.00	2.14	-0.16	0.91	10.74
BBgBarc U.S. 30 Year Treasury	2.68	-9.57	-13.58	-20.02	7.32	3.41	3.49	6.55	15.77	18.72	16.43	-2.72	9.14	0.88	-3.17	29.38
BBgBarc U.S. Corporate Bond	1.11	-2.34	-3.59	4.46	6.92	4.85	4.55	4.98	7.07	9.89	14.54	-2.51	6.42	6.11	-0.68	7.46
BBgBarc U.S. Corporate High Yield	1.09	1.61	1.95	19.67	7.00	7.46	5.98	6.43	9.32	7.11	14.32	-2.08	7.50	17.13	-4.47	2.45
BBgBarc U.S. Treasury TIPS	1.40	-0.42	-0.09	6.09	6.19	4.08	3.58	3.33	3.92	10.99	8.43	-1.26	3.01	4.68	-1.44	3.64
BBgBarc Municipal	0.84	-0.15	0.48	7.75	5.33	3.51	3.81	4.44	4.04	5.21	7.54	1.28	5.45	0.25	3.30	9.05
BBgBarc Municipal 5 Year	0.45	-0.19	0.14	5.66	4.18	2.51	2.66	2.85	2.97	4.29	5.45	1.69	3.14	-0.39	2.43	3.19
BBgBarc Global Agg. Ex US	1.62	-2.76	-3.76	6.71	2.47	2.04	2.78	0.99	5.71	10.11	5.09	-2.15	10.51	1.49	-6.02	-3.08

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International Equity Market Indexes																
MSCI EAFE Net	3.01	7.74	6.59	39.88	6.27	8.87	5.61	5.22	17.77	7.82	22.01	-13.79	25.03	1.00	-0.81	-4.90
MSCI World Net	4.65	10.91	9.80	45.33	14.10	14.03	10.78	9.92	18.23	15.90	27.67	-8.71	22.40	7.51	-0.87	4.94
MSCI World Ex US Net	3.15	8.47	7.32	40.64	6.63	8.91	5.61	4.98	18.02	7.59	22.49	-14.09	24.21	2.75	-3.04	-4.32
MSCI EAFE Small Cap Net	4.02	9.11	8.70	52.63	7.24	10.87	9.14	7.88	20.37	12.34	24.96	-17.89	33.01	2.18	9.59	-4.95
MSCI All Country World Index Net	4.37	9.64	9.14	45.75	13.32	13.85	10.34	9.17	17.99	16.25	26.60	-9.41	23.97	7.86	-2.36	4.16
MSCI All Country World Index Ex USA Net	2.94	6.31	6.54	42.98	6.98	9.83	5.99	4.73	17.70	10.65	21.51	-14.20	27.19	4.50	-5.66	-3.87
MSCI All Country Americas Net	5.34	12.19	11.00	47.76	17.76	16.49	13.35	12.26	19.04	19.16	30.37	-5.75	20.96	11.96	-1.78	10.99
MSCI All Country Asia Net	1.03	1.10	3.34	41.29	8.09	12.32	7.67	6.89	15.70	20.92	18.83	-13.73	33.41	3.93	-0.65	0.54
MSCI All Country Europe Net	4.45	10.22	8.59	42.53	6.13	8.54	5.17	4.40	19.45	4.70	24.10	-14.76	25.32	0.36	-3.23	-7.22
MSCI All Country Europe & Middle East Net	4.48	10.31	8.87	42.44	6.13	8.40	5.07	4.32	19.27	4.64	23.44	-14.50	24.83	0.13	-3.22	-7.09
MSCI Emerging Markets Net	2.49	1.71	4.83	48.71	7.51	12.50	6.75	3.59	19.18	18.31	18.44	-14.58	37.28	11.19	-14.92	-2.19
MSCI Emerging Mkts. Asia Net	2.41	0.28	4.62	50.20	10.29	15.32	8.65	6.49	18.48	28.38	19.24	-15.45	42.83	6.14	-9.79	4.89
MSCI Emerging Mkts. Eastern Europe Net	1.61	6.41	4.25	30.58	6.01	9.88	6.04	-1.12	27.42	-11.97	34.51	-4.36	17.21	37.79	-4.69	-37.59
MSCI Emerging Mkts. Europe & Middle East Net	3.40	9.71	10.15	34.08	4.36	6.34	2.98	-2.90	21.54	-7.60	19.33	-8.07	15.86	22.19	-15.14	-28.80
MSCI Emerging Mkts. Far East Net	2.87	-0.50	4.68	50.14	10.64	15.92	8.81	6.77	18.82	30.04	20.92	-16.51	43.53	7.19	-10.30	2.83
MSCI Emerging Mkts. Latin America Net	3.69	5.25	-1.82	46.40	-4.51	3.59	0.68	-3.75	33.50	-13.80	17.46	-6.57	23.74	31.04	-31.04	-12.30
MSCI Frontier Markets Net	6.84	7.30	7.70	39.42	1.91	7.40	3.67	4.15	18.48	1.43	17.99	-16.41	31.86	2.66	-14.46	6.84

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U.S. Equity Sector Indexes																
S&P 500 Communication Services	7.85	18.10	16.57	52.45	22.22	12.31	11.88	11.05	19.06	23.61	32.69	-12.53	-1.25	23.49	3.40	2.99
S&P 500 Consumer Discretionary	7.10	9.99	10.43	51.30	21.63	19.47	17.28	17.85	22.37	33.30	27.94	0.83	22.98	6.03	10.11	9.68
S&P 500 Consumer Staples	2.21	9.02	3.38	22.79	14.63	8.96	9.28	11.32	14.12	10.75	27.61	-8.38	13.49	5.38	6.60	15.98
S&P 500 Energy	0.59	26.83	31.63	35.76	-8.08	-2.27	-4.32	-1.64	40.68	-33.68	11.81	-18.10	-1.01	27.36	-21.12	-7.78
S&P 500 Financials	6.57	25.71	23.61	62.90	12.27	16.37	13.19	12.82	24.62	-1.69	32.13	-13.03	22.18	22.80	-1.53	15.20
S&P 500 Health Care	3.96	5.76	7.27	23.70	16.12	13.84	11.20	15.33	15.91	13.45	20.82	6.47	22.08	-2.69	6.89	25.34
S&P 500 Industrials	3.59	20.60	15.41	61.60	14.54	14.32	12.56	12.32	24.01	11.06	29.37	-13.29	21.03	18.86	-2.53	9.83
S&P 500 Information Technology	5.26	8.34	7.34	54.11	30.72	30.39	24.73	20.77	21.05	43.89	50.29	-0.29	38.83	13.85	5.92	20.12
S&P 500 Materials	5.34	17.72	14.91	62.88	15.93	14.40	11.04	9.80	21.36	20.73	24.58	-14.70	23.84	16.69	-8.38	6.91
S&P 500 Utilities	4.28	8.19	7.20	20.65	12.80	10.37	10.91	11.30	15.16	0.48	26.35	4.11	12.11	16.29	-4.85	28.98
DJ US Real Estate	8.06	16.71	16.38	33.63	13.07	9.28	8.80	9.12	18.54	-5.29	28.92	-4.03	9.84	7.56	2.14	27.24
DJ Global World Real Estate	5.45	12.20	11.00	30.18	7.51	7.24	5.98	6.79	17.93	-6.19	25.33	-6.69	16.94	4.79	-0.65	13.44

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Commodity Indexes																
Bloomberg Commodity	8.29	12.82	15.78	48.52	1.62	2.26	-1.32	-5.85	15.38	-3.12	7.69	-11.25	1.70	11.77	-24.66	-17.01
Bloomberg Sub Energy	7.07	19.11	25.62	52.43	-13.06	-5.36	-12.24	-14.66	33.00	-42.72	11.78	-12.70	-4.31	16.27	-38.87	-39.34
Bloomberg Sub Gold	3.04	-4.61	-7.07	1.34	8.66	5.19	5.78	0.41	13.04	20.95	18.03	-2.81	12.79	7.75	-10.88	-1.75
Bloomberg Sub Grains	15.98	16.72	25.55	71.70	8.26	1.46	1.12	-3.63	20.03	19.32	-1.12	-5.50	-11.31	-5.88	-19.42	-9.37
Bloomberg Sub Industrial Metals	8.82	16.94	16.97	63.14	6.49	10.65	4.50	-1.99	17.68	16.33	6.98	-19.48	29.35	19.92	-26.88	-6.87
Bloomberg Sub Livestock	-1.50	7.24	8.79	22.19	-5.20	-4.57	-6.15	-4.38	18.04	-23.42	-5.99	-1.71	6.36	-5.63	-18.83	11.56
Bloomberg Sub Petroleum	6.94	22.52	31.34	130.95	-8.89	0.10	-7.88	-10.32	48.03	-40.30	33.76	-19.22	9.58	17.20	-39.42	-43.29
Bloomberg Sub Precious Metals	3.56	-4.50	-6.03	12.71	9.92	5.31	5.91	-1.69	15.76	25.60	17.02	-4.57	10.94	9.50	-11.45	-6.71
Bloomberg Sub Silver	5.33	-4.12	-2.29	68.36	14.32	5.93	6.45	-7.40	33.30	42.47	13.87	-10.19	5.79	14.01	-12.72	-20.42
Bloomberg Sub Softs	12.44	10.61	10.76	42.17	1.11	-2.52	-2.42	-8.95	21.44	2.91	4.26	-22.26	-14.80	13.16	-9.85	-10.10

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Volatility & Hedge Fund Indexes																
CBOE Volatility (VIX)	-4.07	-43.76	-18.20	-45.51	5.32	3.46	4.19	2.35	115.36	82.44	-50.94	130.25	-21.37	-22.90	-5.16	39.94
S&P 500 VIX Short-Term Futures	-11.79	-52.01	-40.06	-73.54	-37.17	-47.62	-44.18	-46.70	90.54	13.23	-67.80	68.11	-72.11	-67.81	-36.05	-25.50
S&P 500 VIX Mid-Term Futures	-1.72	-19.79	-6.74	-12.06	12.68	-7.83	-7.40	-17.12	46.45	74.70	-19.32	27.24	-48.87	-21.04	-14.23	-16.49

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Balanced Indexes																
20% MSCI World - 80% BC US Aggregate Bond	1.56	0.60	-0.18	7.91	7.38	5.56	4.86	4.90	4.58	10.11	12.40	-1.58	7.13	3.65	0.38	5.77
40% MSCI World - 60% BC US Aggregate Bond	2.34	3.13	2.28	16.55	9.38	7.85	6.51	6.31	7.51	12.30	16.14	-3.25	10.81	4.63	0.15	5.57
60% MSCI World - 40% BC US Aggregate Bond	3.11	5.70	4.76	25.65	11.18	10.03	8.06	7.63	10.93	14.02	19.93	-4.99	14.58	5.61	-0.14	5.36
80% MSCI World - 20% BC US Aggregate Bond	3.88	8.29	7.27	35.24	12.76	12.10	9.48	8.83	14.53	15.24	23.77	-6.81	18.44	6.57	-0.48	5.15
20% S&P 500 - 80% BC US Aggregate Bond	1.70	0.99	0.21	8.01	8.23	6.19	5.57	5.70	4.63	10.51	13.09	-0.63	7.03	4.50	0.81	7.48
40% S&P 500 - 60% BC US Aggregate Bond	2.61	3.93	3.07	16.76	11.12	9.13	7.95	7.94	7.65	13.14	17.55	-1.39	10.61	6.35	1.03	9.02
60% S&P 500 - 40% BC US Aggregate Bond	3.62	7.02	6.06	25.45	13.38	11.77	10.05	10.00	11.08	14.04	22.38	-2.63	14.52	8.23	1.05	10.60
80% S&P 500 - 20% BC US Aggregate Bond	4.43	9.93	8.88	35.73	16.36	14.76	12.45	12.18	14.78	17.13	26.75	-3.26	18.00	10.08	1.31	12.12

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