



Benchmark Review

May 31, 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	2.21	12.18	13.76	38.79	14.82	16.88	14.14	13.37	18.82	9.72	25.34	-3.48	28.11	16.50	0.21	10.04
NASDAQ Composite Index	-1.44	4.41	6.98	45.95	23.88	23.93	19.35	18.43	20.60	44.92	36.69	-2.84	29.64	8.87	6.96	14.75
Russell 1000	0.47	9.89	12.14	42.66	18.43	17.46	14.50	14.41	19.11	20.96	31.43	-4.78	21.69	12.05	0.92	13.24
Russell 1000 Growth	-1.38	7.14	6.32	39.92	23.02	22.07	18.39	16.98	19.64	38.49	36.39	-1.51	30.21	7.08	5.67	13.05
Russell 1000 Value	2.33	12.69	18.41	44.38	12.94	12.33	10.16	11.51	20.04	2.80	26.54	-8.27	13.66	17.34	-3.83	13.45
Russell 2000	0.21	3.34	15.30	64.56	13.06	16.01	12.01	11.86	25.56	19.96	25.52	-11.01	14.65	21.31	-4.41	4.89
Russell 2000 Growth	-2.86	-3.86	4.10	50.14	14.48	17.57	12.63	12.76	25.49	34.63	28.48	-9.31	22.17	11.32	-1.38	5.60
Russell 2000 Value	3.11	10.69	27.47	79.38	10.72	13.83	10.88	10.64	26.85	4.63	22.39	-12.86	7.84	31.74	-7.47	4.22
Russell 2500	0.21	5.92	15.60	60.45	15.06	16.06	12.39	12.48	24.50	19.99	27.77	-10.00	16.81	17.59	-2.90	7.07
Russell 3000	0.46	9.42	12.34	43.91	18.03	17.36	14.31	14.21	19.43	20.89	31.02	-5.24	21.13	12.74	0.48	12.56
Russell Micro Cap	1.64	4.26	26.25	82.75	14.14	17.48	12.46	12.49	27.90	20.96	22.43	-13.08	13.17	20.37	-5.16	3.65
S&P 500	0.70	10.72	12.62	40.32	18.00	17.16	14.44	14.38	18.52	18.40	31.49	-4.38	21.83	11.96	1.38	13.69
S&P 500 Equal Weighted	1.92	13.11	19.01	52.87	16.72	15.63	12.96	13.54	21.68	12.83	29.24	-7.64	18.90	14.80	-2.20	14.49
S&P MidCap 400	0.20	9.60	18.81	56.77	13.71	14.62	11.97	12.29	23.73	13.66	26.20	-11.08	16.24	20.74	-2.18	9.77
S&P MidCap 400 Growth	-1.75	4.78	11.09	45.86	13.99	15.08	12.40	12.33	21.66	22.77	26.29	-10.34	19.92	14.77	2.02	7.57
S&P MidCap 400 Value	1.93	14.19	26.52	67.96	12.74	13.56	11.00	11.92	26.66	3.73	26.08	-11.88	12.32	26.53	-6.65	12.10
S&P Preferred Stock	1.13	5.21	3.23	16.35	7.99	6.11	6.10	6.43	11.68	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	0.33	-0.14	-2.29	-0.40	5.06	3.25	3.21	3.29	3.50	7.51	8.72	0.01	3.54	2.65	0.55	5.97
BBgBarc Global Agg. Bond	0.94	0.25	-2.35	4.47	4.38	3.11	3.48	2.15	4.40	9.20	6.84	-1.20	7.39	2.09	-3.15	0.59
BBgBarc U.S. Govt/Credit	0.51	-0.17	-2.95	-0.53	5.53	3.55	3.48	3.56	4.29	8.93	9.71	-0.42	4.00	3.05	0.15	6.01
BBgBarc Intermediate U.S. Corporate	0.58	0.30	-0.90	3.84	5.88	4.09	3.88	3.99	4.86	7.47	10.14	-0.23	3.92	4.04	1.08	4.35
BBgBarc U.S. Govt/Credit Interm.	0.40	0.12	-0.98	0.73	4.65	2.90	2.79	2.74	2.35	6.43	6.80	0.88	2.14	2.08	1.07	3.13
BBgBarc U.S. Credit	0.72	0.17	-2.74	3.32	6.72	4.79	4.55	4.68	6.62	9.35	13.80	-2.11	6.18	5.63	-0.77	7.53
BBgBarc U.S. Treasury	0.34	-0.46	-3.20	-3.75	4.44	2.47	2.56	2.74	4.46	8.00	6.86	0.86	2.31	1.04	0.84	5.05
BBgBarc U.S. 3 Year Treasury	0.20	0.21	-0.01	0.22	3.57	2.02	1.88	1.56	1.80	4.63	4.35	1.26	0.52	0.86	0.87	0.92
BBgBarc U.S. 5 Year Treasury	0.44	0.08	-1.48	-1.40	4.64	2.29	2.27	2.36	3.28	7.26	5.82	1.42	0.67	0.48	1.31	2.89
BBgBarc U.S. 10 Year Treasury	0.61	-1.36	-5.37	-7.15	5.41	2.15	2.45	3.47	6.61	10.61	8.90	-0.00	2.14	-0.16	0.91	10.74
BBgBarc U.S. 30 Year Treasury	0.65	-2.99	-13.01	-17.37	6.69	3.38	3.97	6.23	15.74	18.72	16.43	-2.72	9.14	0.88	-3.17	29.38
BBgBarc U.S. Corporate Bond	0.77	0.14	-2.85	3.64	7.00	5.03	4.80	4.91	7.07	9.89	14.54	-2.51	6.42	6.11	-0.68	7.46
BBgBarc U.S. Corporate High Yield	0.30	1.54	2.25	14.96	7.11	7.39	5.98	6.41	9.31	7.11	14.32	-2.08	7.50	17.13	-4.47	2.45
BBgBarc U.S. Treasury TIPS	1.21	2.43	1.12	7.05	6.46	4.48	3.93	3.42	3.94	10.99	8.43	-1.26	3.01	4.68	-1.44	3.64
BBgBarc Municipal	0.30	1.76	0.78	4.74	5.03	3.52	3.91	4.29	4.02	5.21	7.54	1.28	5.45	0.25	3.30	9.05
BBgBarc Municipal 5 Year	0.01	0.91	0.15	2.75	3.84	2.55	2.72	2.73	2.95	4.29	5.45	1.69	3.14	-0.39	2.43	3.19
BBgBarc Global Agg. Ex US	1.36	0.51	-2.45	7.84	3.58	2.81	3.54	1.22	5.61	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	3.26	8.81	10.07	38.41	8.23	9.77	6.26	5.88	17.74	7.82	22.01	-13.79	25.03	1.00	-0.81	-4.90
MSCI World Net	1.44	9.69	11.39	40.63	14.41	14.23	10.98	10.31	18.23	15.90	27.67	-8.71	22.40	7.51	-0.87	4.94
MSCI World Ex US Net	3.48	9.45	11.04	39.60	8.54	9.90	6.37	5.65	18.03	7.59	22.49	-14.09	24.21	2.75	-3.04	-4.32
MSCI EAFE Small Cap Net	2.00	8.42	10.88	45.31	8.30	11.19	9.32	8.37	20.36	12.34	24.96	-17.89	33.01	2.18	9.59	-4.95
MSCI All Country World Index Net	1.56	8.83	10.84	41.85	13.86	14.18	10.65	9.58	17.98	16.25	26.60	-9.41	23.97	7.86	-2.36	4.16
MSCI All Country World Index Ex USA Net	3.13	7.51	9.87	42.78	8.93	10.88	6.81	5.36	17.66	10.65	21.51	-14.20	27.19	4.50	-5.66	-3.87
MSCI All Country Americas Net	0.78	10.19	11.87	41.73	17.32	16.41	13.37	12.50	19.05	19.16	30.37	-5.75	20.96	11.96	-1.78	10.99
MSCI All Country Asia Net	1.34	1.10	4.73	40.84	9.00	12.89	8.06	7.20	15.66	20.92	18.83	-13.73	33.41	3.93	-0.65	0.54
MSCI All Country Europe Net	4.36	12.32	13.32	42.11	8.88	9.64	6.08	5.22	19.42	4.70	24.10	-14.76	25.32	0.36	-3.23	-7.22
MSCI All Country Europe & Middle East Net	4.19	12.27	13.43	41.87	8.79	9.49	5.95	5.11	19.23	4.64	23.44	-14.50	24.83	0.13	-3.22	-7.09
MSCI Emerging Markets Net	2.32	3.28	7.26	51.00	9.65	13.88	7.89	4.10	19.02	18.31	18.44	-14.58	37.28	11.19	-14.92	-2.19
MSCI Emerging Mkts. Asia Net	1.24	0.59	5.92	52.52	11.25	15.89	9.38	6.79	18.43	28.38	19.24	-15.45	42.83	6.14	-9.79	4.89
MSCI Emerging Mkts. Eastern Europe Net	10.60	15.98	15.29	33.30	10.72	13.56	8.96	0.49	27.90	-11.97	34.51	-4.36	17.21	37.79	-4.69	-37.59
MSCI Emerging Mkts. Europe & Middle East Net	5.35	13.85	16.05	34.97	7.96	8.98	4.75	-1.70	21.47	-7.60	19.33	-8.07	15.86	22.19	-15.14	-28.80
MSCI Emerging Mkts. Far East Net	0.26	-0.65	4.95	50.53	11.12	16.36	9.47	6.92	18.79	30.04	20.92	-16.51	43.53	7.19	-10.30	2.83
MSCI Emerging Mkts. Latin America Net	7.99	17.16	6.02	48.52	3.05	7.63	3.23	-2.74	32.71	-13.80	17.46	-6.57	23.74	31.04	-31.04	-12.30
MSCI Frontier Markets Net	4.01	11.46	12.02	37.16	6.64	8.03	4.98	4.97	17.70	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	-0.07	11.15	16.49	43.71	23.13	12.29	12.20	10.86	18.93	23.61	32.69	-12.53	-1.25	23.49	3.40	2.99
S&P 500 Consumer Discretionary	-3.81	6.78	6.22	38.64	19.28	18.51	16.27	17.43	22.61	33.30	27.94	0.83	22.98	6.03	10.11	9.68
S&P 500 Consumer Staples	1.77	12.54	5.22	23.10	15.90	9.18	9.44	11.24	14.02	10.75	27.61	-8.38	13.49	5.38	6.60	15.98
S&P 500 Energy	5.77	9.36	39.22	40.94	-7.27	-1.06	-2.63	-0.66	40.78	-33.68	11.81	-18.10	-1.01	27.36	-21.12	-7.78
S&P 500 Financials	4.79	18.15	29.53	66.17	14.38	16.99	13.73	13.72	24.67	-1.69	32.13	-13.03	22.18	22.80	-1.53	15.20
S&P 500 Health Care	1.89	10.08	9.29	22.02	16.76	13.77	10.73	15.27	15.90	13.45	20.82	6.47	22.08	-2.69	6.89	25.34
S&P 500 Industrials	3.14	16.36	19.03	57.98	14.59	15.14	13.08	12.98	24.01	11.06	29.37	-13.29	21.03	18.86	-2.53	9.83
S&P 500 Information Technology	-0.91	6.07	6.36	42.65	27.27	28.74	24.07	20.86	20.93	43.89	50.29	-0.29	38.83	13.85	5.92	20.12
S&P 500 Materials	5.22	19.25	20.91	60.21	17.11	15.63	11.90	10.67	21.47	20.73	24.58	-14.70	23.84	16.69	-8.38	6.91
S&P 500 Utilities	-2.38	12.50	4.65	12.81	12.32	9.51	10.35	10.80	15.24	0.48	26.35	4.11	12.11	16.29	-4.85	28.98
DJ US Real Estate	1.02	15.35	17.56	32.45	12.23	9.00	9.02	9.12	18.49	-5.29	28.92	-4.03	9.84	7.56	2.14	27.24
DJ Global World Real Estate	1.65	10.97	12.83	30.81	7.83	7.64	6.56	6.94	17.94	-6.19	25.33	-6.69	16.94	4.79	-0.65	13.44

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Commodity Indexes																
Bloomberg Commodity	2.73	8.86	18.94	46.22	2.05	2.85	-0.43	-5.11	15.43	-3.12	7.69	-11.25	1.70	11.77	-24.66	-17.01
Bloomberg Sub Energy	3.28	6.60	29.74	41.38	-12.89	-5.32	-11.45	-13.73	33.02	-42.72	11.78	-12.70	-4.31	16.27	-38.87	-39.34
Bloomberg Sub Gold	7.66	9.91	0.06	6.21	11.90	8.04	6.99	1.29	13.56	20.95	18.03	-2.81	12.79	7.75	-10.88	-1.75
Bloomberg Sub Grains	-3.93	11.35	20.62	65.79	7.09	0.30	0.97	-3.87	20.20	19.32	-1.12	-5.50	-11.31	-5.88	-19.42	-9.37
Bloomberg Sub Industrial Metals	3.84	10.26	21.46	64.85	6.97	13.18	6.57	-1.34	17.75	16.33	6.98	-19.48	29.35	19.92	-26.88	-6.87
Bloomberg Sub Livestock	2.90	6.78	11.94	19.45	-4.99	-4.48	-6.06	-3.37	18.08	-23.42	-5.99	-1.71	6.36	-5.63	-18.83	11.56
Bloomberg Sub Petroleum	4.26	8.73	36.93	78.50	-8.13	0.08	-7.07	-9.04	48.08	-40.30	33.76	-19.22	9.58	17.20	-39.42	-43.29
Bloomberg Sub Precious Metals	7.81	8.92	1.31	14.28	13.08	8.48	7.02	-0.16	16.21	25.60	17.02	-4.57	10.94	9.50	-11.45	-6.71
Bloomberg Sub Silver	8.28	5.82	5.79	47.54	17.19	9.98	7.27	-4.41	33.52	42.47	13.87	-10.19	5.79	14.01	-12.72	-20.42
Bloomberg Sub Softs	5.33	6.66	16.66	52.23	0.71	-2.24	-0.21	-8.18	21.33	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)	-9.94	-40.04	-26.33	-39.08	2.79	3.39	3.24	0.82	115.59	82.44	-50.94	130.25	-21.37	-22.90	-5.16	39.94
S&P 500 VIX Short-Term Futures	-13.52	-45.47	-48.16	-73.34	-37.93	-46.90	-44.19	-47.01	90.67	13.23	-67.80	68.11	-72.11	-67.81	-36.05	-25.50
S&P 500 VIX Mid-Term Futures	-5.68	-21.94	-12.04	-17.03	12.92	-7.71	-7.28	-17.40	46.41	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	0.56	1.82	0.38	7.02	7.33	5.65	4.98	4.89	4.58	10.11	12.40	-1.58	7.13	3.65	0.38	5.77
40% MSCI World - 60% BC US Aggregate Bond	0.78	3.78	3.08	14.82	9.42	7.97	6.65	6.40	7.51	12.30	16.14	-3.25	10.81	4.63	0.15	5.57
60% MSCI World - 40% BC US Aggregate Bond	1.01	5.75	5.82	23.01	11.31	10.18	8.22	7.82	10.93	14.02	19.93	-4.99	14.58	5.61	-0.14	5.36
80% MSCI World - 20% BC US Aggregate Bond	1.22	7.72	8.58	31.61	12.98	12.27	9.66	9.12	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	0.40	2.02	0.62	6.95	8.00	6.19	5.63	5.66	4.62	10.51	13.09	-0.63	7.03	4.50	0.81	7.48
40% S&P 500 - 60% BC US Aggregate Bond	0.48	4.19	3.56	14.69	10.78	9.07	7.97	7.96	7.64	13.14	17.55	-1.39	10.61	6.35	1.03	9.02
60% S&P 500 - 40% BC US Aggregate Bond	0.56	6.47	6.66	22.61	12.94	11.66	10.02	10.08	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	0.63	8.54	9.56	31.36	15.81	14.57	12.39	12.33	14.78	17.13	26.75	-3.26	18.00	10.08	1.31	12.12

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