



Benchmark Review

June 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	0.02	5.08	13.79	36.34	15.02	16.66	14.54	13.50	18.81	9.72	25.34	-3.48	28.11	16.50	0.21	10.04
NASDAQ Composite Index	5.55	9.68	12.92	45.23	25.72	25.80	20.74	19.32	20.70	44.92	36.69	-2.84	29.64	8.87	6.96	14.75
Russell 1000	2.51	8.54	14.95	43.07	19.16	17.99	15.34	14.90	19.11	20.96	31.43	-4.78	21.69	12.05	0.92	13.24
Russell 1000 Growth	6.27	11.93	12.99	42.50	25.14	23.66	19.95	17.87	19.79	38.49	36.39	-1.51	30.21	7.08	5.67	13.05
Russell 1000 Value	-1.15	5.21	17.05	43.68	12.42	11.87	10.32	11.61	20.08	2.80	26.54	-8.27	13.66	17.34	-3.83	13.45
Russell 2000	1.94	4.29	17.54	62.03	13.52	16.47	12.23	12.34	25.56	19.96	25.52	-11.01	14.65	21.31	-4.41	4.89
Russell 2000 Growth	4.69	3.92	8.98	51.36	15.94	18.76	13.24	13.52	25.56	34.63	28.48	-9.31	22.17	11.32	-1.38	5.60
Russell 2000 Value	-0.61	4.56	26.69	73.28	10.27	13.62	10.74	10.85	26.87	4.63	22.39	-12.86	7.84	31.74	-7.47	4.22
Russell 2500	1.18	5.44	16.97	57.79	15.24	16.35	12.74	12.86	24.50	19.99	27.77	-10.00	16.81	17.59	-2.90	7.07
Russell 3000	2.47	8.24	15.11	44.16	18.73	17.89	15.10	14.70	19.43	20.89	31.02	-5.24	21.13	12.74	0.48	12.56
Russell Micro Cap	2.19	4.14	29.02	75.77	14.47	18.13	12.46	13.06	27.90	20.96	22.43	-13.08	13.17	20.37	-5.16	3.65
S&P 500	2.33	8.55	15.25	40.79	18.67	17.65	15.25	14.84	18.52	18.40	31.49	-4.38	21.83	11.96	1.38	13.69
S&P 500 Equal Weighted	0.14	6.90	19.18	50.71	16.41	15.68	13.41	13.77	21.69	12.83	29.24	-7.64	18.90	14.80	-2.20	14.49
S&P MidCap 400	-1.02	3.64	17.59	53.24	13.17	14.29	12.02	12.40	23.77	13.66	26.20	-11.08	16.24	20.74	-2.18	9.77
S&P MidCap 400 Growth	1.07	3.43	12.28	45.43	14.23	15.25	12.78	12.63	21.66	22.77	26.29	-10.34	19.92	14.77	2.02	7.57
S&P MidCap 400 Value	-2.81	3.84	22.97	61.43	11.52	12.81	10.80	11.88	26.76	3.73	26.08	-11.88	12.32	26.53	-6.65	12.10
S&P Preferred Stock	2.08	4.56	5.38	20.70	8.17	6.28	6.66	6.69	11.69	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	0.70	1.83	-1.60	-0.33	5.34	3.03	3.52	3.39	3.48	7.51	8.72	0.01	3.54	2.65	0.55	5.97
BBgBarc Global Agg. Bond	-0.88	1.31	-3.21	2.63	4.23	2.34	3.40	2.05	4.44	9.20	6.84	-1.20	7.39	2.09	-3.15	0.59
BBgBarc U.S. Govt/Credit	1.01	2.42	-1.96	-0.39	5.95	3.31	3.87	3.71	4.28	8.93	9.71	-0.42	4.00	3.05	0.15	6.01
BBgBarc Intermediate U.S. Corporate	0.38	1.70	-0.52	2.57	6.08	3.87	4.12	4.08	4.84	7.47	10.14	-0.23	3.92	4.04	1.08	4.35
BBgBarc U.S. Govt/Credit Interm.	0.08	0.98	-0.90	0.19	4.70	2.63	2.91	2.76	2.34	6.43	6.80	0.88	2.14	2.08	1.07	3.13
BBgBarc U.S. Credit	1.50	3.32	-1.28	2.99	7.42	4.63	5.11	4.92	6.61	9.35	13.80	-2.11	6.18	5.63	-0.77	7.53
BBgBarc U.S. Treasury	0.64	1.75	-2.58	-3.22	4.66	2.15	2.82	2.84	4.46	8.00	6.86	0.86	2.31	1.04	0.84	5.05
BBgBarc U.S. 3 Year Treasury	-0.38	-0.06	-0.39	-0.21	3.45	1.74	1.83	1.52	1.83	4.63	4.35	1.26	0.52	0.86	0.87	0.92
BBgBarc U.S. 5 Year Treasury	-0.30	0.69	-1.78	-1.82	4.55	1.85	2.32	2.33	3.29	7.26	5.82	1.42	0.67	0.48	1.31	2.89
BBgBarc U.S. 10 Year Treasury	1.27	3.06	-4.17	-5.94	5.85	1.75	3.00	3.67	6.62	10.61	8.90	-0.00	2.14	-0.16	0.91	10.74
BBgBarc U.S. 30 Year Treasury	4.33	7.83	-9.25	-13.74	8.10	2.84	5.55	6.94	15.88	18.72	16.43	-2.72	9.14	0.88	-3.17	29.38
BBgBarc U.S. Corporate Bond	1.63	3.55	-1.27	3.30	7.79	4.90	5.40	5.17	7.06	9.89	14.54	-2.51	6.42	6.11	-0.68	7.46
BBgBarc U.S. Corporate High Yield	1.34	2.74	3.62	15.37	7.45	7.48	6.48	6.66	9.32	7.11	14.32	-2.08	7.50	17.13	-4.47	2.45
BBgBarc U.S. Treasury TIPS	0.61	3.25	1.73	6.51	6.53	4.17	4.20	3.40	3.94	10.99	8.43	-1.26	3.01	4.68	-1.44	3.64
BBgBarc Municipal	0.27	1.42	1.06	4.17	5.10	3.25	3.97	4.28	4.02	5.21	7.54	1.28	5.45	0.25	3.30	9.05
BBgBarc Municipal 5 Year	0.02	0.48	0.17	2.24	3.75	2.38	2.68	2.71	2.96	4.29	5.45	1.69	3.14	-0.39	2.43	3.19
BBgBarc Global Agg. Ex US	-2.02	0.92	-4.42	4.60	3.12	1.63	3.17	0.99	5.74	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	-1.13	5.17	8.83	32.35	8.27	10.28	6.57	5.89	17.74	7.82	22.01	-13.79	25.03	1.00	-0.81	-4.90
MSCI World Net	1.49	7.74	13.05	39.04	14.99	14.83	11.69	10.65	18.21	15.90	27.67	-8.71	22.40	7.51	-0.87	4.94
MSCI World Ex US Net	-1.02	5.65	9.92	33.60	8.57	10.36	6.70	5.70	18.03	7.59	22.49	-14.09	24.21	2.75	-3.04	-4.32
MSCI EAFE Small Cap Net	-1.65	4.34	9.04	40.98	8.40	12.03	9.24	8.38	20.34	12.34	24.96	-17.89	33.01	2.18	9.59	-4.95
MSCI All Country World Index Net	1.32	7.39	12.30	39.26	14.57	14.61	11.33	9.90	17.95	16.25	26.60	-9.41	23.97	7.86	-2.36	4.16
MSCI All Country World Index Ex USA Net	-0.65	5.48	9.16	35.72	9.38	11.08	7.20	5.45	17.61	10.65	21.51	-14.20	27.19	4.50	-5.66	-3.87
MSCI All Country Americas Net	2.62	8.94	14.80	42.10	18.13	16.90	14.23	13.00	19.05	19.16	30.37	-5.75	20.96	11.96	-1.78	10.99
MSCI All Country Asia Net	-0.18	2.21	4.54	33.98	10.37	12.79	8.54	7.25	15.43	20.92	18.83	-13.73	33.41	3.93	-0.65	0.54
MSCI All Country Europe Net	-1.25	7.63	11.90	35.04	8.67	10.34	6.41	5.28	19.44	4.70	24.10	-14.76	25.32	0.36	-3.23	-7.22
MSCI All Country Europe & Middle East Net	-1.10	7.66	12.17	35.15	8.62	10.20	6.29	5.19	19.24	4.64	23.44	-14.50	24.83	0.13	-3.22	-7.09
MSCI Emerging Markets Net	0.17	5.05	7.45	40.90	11.27	13.03	8.40	4.28	18.79	18.31	18.44	-14.58	37.28	11.19	-14.92	-2.19
MSCI Emerging Mkts. Asia Net	0.09	3.77	6.02	41.03	13.06	15.26	10.15	7.03	18.13	28.38	19.24	-15.45	42.83	6.14	-9.79	4.89
MSCI Emerging Mkts. Eastern Europe Net	2.20	14.84	17.83	37.55	11.61	13.87	9.88	0.73	27.89	-11.97	34.51	-4.36	17.21	37.79	-4.69	-37.59
MSCI Emerging Mkts. Europe & Middle East Net	2.17	11.29	18.56	36.93	8.98	9.42	5.40	-1.46	21.47	-7.60	19.33	-8.07	15.86	22.19	-15.14	-28.80
MSCI Emerging Mkts. Far East Net	0.20	3.34	5.17	39.13	13.16	15.71	10.36	7.24	18.44	30.04	20.92	-16.51	43.53	7.19	-10.30	2.83
MSCI Emerging Mkts. Latin America Net	2.70	15.01	8.89	44.92	5.05	5.89	3.52	-2.45	32.65	-13.80	17.46	-6.57	23.74	31.04	-31.04	-12.30
MSCI Frontier Markets Net	2.67	14.10	15.01	38.50	8.88	9.37	5.46	5.34	17.56	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	2.72	10.72	19.67	48.38	23.27	10.89	13.15	11.30	18.94	23.61	32.69	-12.53	-1.25	23.49	3.40	2.99
S&P 500 Consumer Discretionary	3.81	6.95	10.27	37.08	19.36	19.69	16.88	17.89	22.62	33.30	27.94	0.83	22.98	6.03	10.11	9.68
S&P 500 Consumer Staples	-0.18	3.83	5.02	23.29	14.14	8.04	9.74	11.49	13.92	10.75	27.61	-8.38	13.49	5.38	6.60	15.98
S&P 500 Energy	4.61	11.30	45.64	49.38	-6.09	-0.80	-1.33	-0.02	40.87	-33.68	11.81	-18.10	-1.01	27.36	-21.12	-7.78
S&P 500 Financials	-2.96	8.36	25.69	61.77	13.97	17.05	13.21	13.71	24.73	-1.69	32.13	-13.03	22.18	22.80	-1.53	15.20
S&P 500 Health Care	2.34	8.40	11.85	27.92	17.03	14.06	11.21	15.67	15.91	13.45	20.82	6.47	22.08	-2.69	6.89	25.34
S&P 500 Industrials	-2.21	4.48	16.40	51.45	15.02	14.40	13.14	12.80	23.95	11.06	29.37	-13.29	21.03	18.86	-2.53	9.83
S&P 500 Information Technology	6.95	11.56	13.76	42.40	30.31	31.21	26.39	21.99	21.05	43.89	50.29	-0.29	38.83	13.85	5.92	20.12
S&P 500 Materials	-5.30	4.97	14.50	48.51	14.87	14.59	11.63	10.09	21.82	20.73	24.58	-14.70	23.84	16.69	-8.38	6.91
S&P 500 Utilities	-2.17	-0.41	2.38	15.77	10.49	7.41	11.09	10.56	15.31	0.48	26.35	4.11	12.11	16.29	-4.85	28.98
DJ US Real Estate	2.31	11.68	20.28	32.26	11.60	8.20	10.23	9.70	18.43	-5.29	28.92	-4.03	9.84	7.56	2.14	27.24
DJ Global World Real Estate	0.86	8.11	13.80	28.59	7.90	7.06	7.34	7.29	17.94	-6.19	25.33	-6.69	16.94	4.79	-0.65	13.44

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Commodity Indexes																
Bloomberg Commodity	1.85	13.30	21.15	45.61	3.90	2.40	-0.41	-4.44	15.29	-3.12	7.69	-11.25	1.70	11.77	-24.66	-17.01
Bloomberg Sub Energy	11.44	23.23	44.58	54.19	-10.49	-3.80	-9.77	-12.22	33.70	-42.72	11.78	-12.70	-4.31	16.27	-38.87	-39.34
Bloomberg Sub Gold	-7.01	3.15	-6.96	-3.93	10.60	4.76	5.97	0.78	14.08	20.95	18.03	-2.81	12.79	7.75	-10.88	-1.75
Bloomberg Sub Grains	-0.12	11.29	20.48	65.28	11.60	0.87	-1.87	-2.67	18.81	19.32	-1.12	-5.50	-11.31	-5.88	-19.42	-9.37
Bloomberg Sub Industrial Metals	-3.18	9.41	17.60	49.37	7.56	10.99	6.88	-1.62	17.60	16.33	6.98	-19.48	29.35	19.92	-26.88	-6.87
Bloomberg Sub Livestock	-2.78	-1.46	8.83	26.91	-6.72	-4.88	-5.63	-4.02	18.04	-23.42	-5.99	-1.71	6.36	-5.63	-18.83	11.56
Bloomberg Sub Petroleum	8.40	20.85	48.43	76.53	-6.81	2.19	-5.46	-7.71	48.26	-40.30	33.76	-19.22	9.58	17.20	-39.42	-43.29
Bloomberg Sub Precious Metals	-6.92	3.93	-5.70	4.11	11.65	4.80	6.28	-0.46	16.68	25.60	17.02	-4.57	10.94	9.50	-11.45	-6.71
Bloomberg Sub Silver	-6.60	6.52	-1.19	38.20	15.28	5.29	7.34	-4.15	33.81	42.47	13.87	-10.19	5.79	14.01	-12.72	-20.42
Bloomberg Sub Softs	0.22	18.68	16.91	43.83	3.40	-4.65	-0.57	-8.29	20.84	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)	-5.55	-18.40	-30.42	-47.98	-0.54	0.25	-2.33	-0.43	115.75	82.44	-50.94	130.25	-21.37	-22.90	-5.16	39.94
S&P 500 VIX Short-Term Futures	-15.07	-35.21	-55.97	-78.19	-41.03	-48.75	-46.33	-47.82	91.02	13.23	-67.80	68.11	-72.11	-67.81	-36.05	-25.50
S&P 500 VIX Mid-Term Futures	-4.95	-11.89	-16.40	-23.50	11.17	-8.97	-8.21	-17.93	46.56	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	0.87	3.01	1.25	6.79	7.67	5.58	5.37	5.04	4.56	10.11	12.40	-1.58	7.13	3.65	0.38	5.77
40% MSCI World - 60% BC US Aggregate Bond	1.03	4.20	4.14	14.28	9.83	8.05	7.12	6.60	7.50	12.30	16.14	-3.25	10.81	4.63	0.15	5.57
60% MSCI World - 40% BC US Aggregate Bond	1.18	5.38	7.07	22.15	11.78	10.43	8.77	8.06	10.92	14.02	19.93	-4.99	14.58	5.61	-0.14	5.36
80% MSCI World - 20% BC US Aggregate Bond	1.34	6.56	10.04	30.40	13.51	12.69	10.29	9.41	14.51	15.24	23.77	-6.81	18.44	6.57	-0.48	5.15
20% S&P 500 - 80% BC US Aggregate Bond	1.04	3.17	1.66	7.07	8.36	6.10	6.03	5.83	4.61	10.51	13.09	-0.63	7.03	4.50	0.81	7.48
40% S&P 500 - 60% BC US Aggregate Bond	1.37	4.52	4.98	14.86	11.22	9.11	8.48	8.20	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	1.74	6.01	8.51	23.00	13.47	11.85	10.64	10.40	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	2.02	7.21	11.78	31.71	16.40	14.90	13.10	12.71	14.78	17.13	26.75	-3.26	18.00	10.08	1.31	12.12

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