



# Benchmark Review

May 31, 2024

	1 Month	3 Months	YTD	1 Year	3 Year	5 Year	7 Year	10 Year	Std Dev 3 Year	2023	2022	2021	2020	2019	2018	2017
<b>U.S. Equity Market Indexes</b>																
DJ Industrial Average	2.58	-0.31	3.52	19.97	6.00	11.62	10.32	11.25	16.73	16.18	-6.86	20.95	9.72	25.34	-3.48	28.11
NASDAQ Composite Index	6.98	4.19	11.82	30.37	7.61	18.54	15.46	15.85	22.07	44.64	-32.54	22.18	44.92	36.69	-2.84	29.64
Russell 1000	4.71	3.47	10.58	28.01	8.46	15.42	13.34	12.40	17.97	26.53	-19.13	26.45	20.96	31.43	-4.78	21.69
Russell 1000 Growth	5.99	3.28	13.08	33.60	11.12	19.37	16.92	15.80	21.17	42.68	-29.14	27.60	38.49	36.39	-1.51	30.21
Russell 1000 Value	3.17	3.70	7.64	21.71	5.45	10.74	9.13	8.61	16.60	11.46	-7.54	25.16	2.80	26.54	-8.27	13.66
Russell 2000	5.02	1.12	2.68	20.12	-1.65	8.61	5.45	7.66	21.96	16.93	-20.44	14.82	19.96	25.52	-11.01	14.65
Russell 2000 Growth	5.36	-0.04	4.62	18.38	-3.34	7.79	5.19	8.06	22.97	18.66	-26.36	2.83	34.63	28.48	-9.31	22.17
Russell 2000 Value	4.68	2.30	0.85	21.76	-0.17	8.77	5.13	6.87	21.90	14.65	-14.48	28.27	4.63	22.39	-12.86	7.84
Russell 2500	4.16	1.19	3.91	21.70	0.60	10.14	7.59	8.66	20.90	17.42	-18.37	18.18	19.99	27.77	-10.00	16.81
Russell 3000	4.72	3.35	10.15	27.58	7.83	15.00	12.81	12.09	18.05	25.96	-19.21	25.66	20.89	31.02	-5.24	21.13
Russell Micro Cap	5.07	-0.65	1.44	15.54	-6.47	7.32	3.32	6.29	22.82	9.33	-21.96	19.34	20.96	22.43	-13.08	13.17
S&P 500	4.96	3.91	11.30	28.19	9.57	15.80	13.71	12.69	17.81	26.29	-18.11	28.71	18.40	31.49	-4.38	21.83
S&P 500 Equal Weighted	2.82	2.18	5.55	20.96	5.05	12.67	10.73	10.40	18.35	13.87	-11.45	29.63	12.83	29.24	-7.64	18.90
S&P MidCap 400	4.39	3.60	7.87	25.97	4.67	12.26	9.10	9.76	20.43	16.44	-13.06	24.76	13.66	26.20	-11.08	16.24
S&P MidCap 400 Growth	4.12	3.50	13.14	30.84	4.86	12.29	9.33	10.28	20.86	17.49	-18.96	18.90	22.77	26.29	-10.34	19.92
S&P MidCap 400 Value	4.68	3.66	2.40	20.88	4.33	11.73	8.45	8.85	21.02	15.39	-6.93	30.65	3.73	26.08	-11.88	12.32
S&P Preferred Stock	2.77	0.09	5.22	13.43	-0.43	3.45	3.69	4.15	14.06	12.02	-18.93	6.64	7.97	17.64	-4.25	9.11

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<b>Fixed Income Market Indexes</b>																
Bloomberg U.S. Agg. Bond	1.70	0.04	-1.64	1.31	-3.10	-0.17	0.90	1.26	7.42	5.53	-13.01	-1.54	7.51	8.72	0.01	3.54
Bloomberg Global Agg. Bond	1.31	-0.70	-3.30	0.77	-5.82	-1.62	-0.85	-0.37	8.79	5.72	-16.25	-4.71	9.20	6.84	-1.20	7.39
Bloomberg U.S. Govt/Credit	1.60	0.05	-1.53	1.53	-3.07	0.05	1.14	1.42	7.30	5.72	-13.58	-1.75	8.93	9.71	-0.42	4.00
Bloomberg Intermediate U.S. Corporate	1.41	1.01	0.31	4.99	-0.88	1.63	2.45	2.30	5.92	7.29	-9.40	-1.00	7.47	10.14	-0.23	3.92
Bloomberg U.S. Govt/Credit Interm.	1.21	0.48	-0.31	2.67	-1.41	0.76	1.57	1.46	4.76	5.24	-8.23	-1.44	6.43	6.80	0.88	2.14
Bloomberg U.S. Credit	1.82	0.51	-1.12	4.05	-2.67	0.85	1.92	2.16	8.98	8.18	-15.26	-1.08	9.35	13.80	-2.11	6.18
Bloomberg U.S. Treasury	1.46	-0.27	-1.85	-0.22	-3.38	-0.67	0.46	0.79	6.36	4.05	-12.46	-2.32	8.00	6.86	0.86	2.31
Bloomberg U.S. 3 Year Treasury	0.92	0.38	-0.15	2.18	-1.22	0.51	1.15	0.88	3.42	4.18	-6.26	-1.16	4.63	4.35	1.26	0.52
Bloomberg U.S. 5 Year Treasury	1.28	-0.12	-1.44	0.41	-3.02	-0.33	0.74	0.66	5.44	3.93	-9.74	-2.80	7.26	5.82	1.42	0.67
Bloomberg U.S. 10 Year Treasury	1.89	-0.88	-3.27	-3.05	-5.24	-1.74	-0.06	0.38	9.10	3.21	-16.33	-3.60	10.61	8.90	-0.00	2.14
Bloomberg U.S. 30 Year Treasury	2.81	-3.33	-7.95	-9.14	-11.79	-5.68	-2.99	-0.29	17.00	1.93	-33.29	-4.62	18.72	16.43	-2.72	9.14
Bloomberg U.S. Corporate Bond	1.87	0.56	-1.12	4.40	-2.71	0.98	2.03	2.28	9.37	8.52	-15.76	-1.04	9.89	14.54	-2.51	6.42
Bloomberg U.S. Corporate High Yield	1.10	1.33	1.63	11.24	1.78	4.19	4.41	4.30	8.40	13.44	-11.19	5.28	7.11	14.32	-2.08	7.50
Bloomberg U.S. Treasury TIPS	1.72	0.83	-0.08	1.56	-1.39	2.09	2.46	1.86	7.20	3.90	-11.85	5.96	10.99	8.43	-1.26	3.01
Bloomberg Municipal	-0.29	-1.53	-1.91	2.67	-1.29	0.93	1.82	2.25	7.43	6.40	-8.53	1.52	5.21	7.54	1.28	5.45
Bloomberg Municipal 5 Year	-0.65	-1.58	-1.83	1.90	-0.94	0.73	1.42	1.46	5.03	4.31	-5.26	0.34	4.29	5.45	1.69	3.14
Bloomberg Global Agg. Ex US	1.00	-1.37	-4.77	0.10	-7.95	-2.89	-2.35	-1.69	10.27	5.72	-18.70	-7.05	10.11	5.09	-2.15	10.51

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<b>International Equity Market Indexes</b>																
MSCI EAFE Net	3.87	4.54	7.07	18.53	3.06	8.05	5.62	4.60	16.92	18.24	-14.45	11.26	7.82	22.01	-13.79	25.03
MSCI World Net	4.47	3.82	9.52	24.92	6.67	12.76	10.47	9.13	17.22	23.79	-18.14	21.82	15.90	27.67	-8.71	22.40
MSCI World Ex US Net	3.82	4.48	6.72	18.48	3.05	8.15	5.76	4.60	16.89	17.94	-14.29	12.62	7.59	22.49	-14.09	24.21
MSCI EAFE Small Cap Net	4.33	5.00	3.66	14.38	-2.89	5.71	2.55	4.77	18.41	13.16	-21.39	10.10	12.34	24.96	-17.89	33.01
MSCI All Country World Index Net	4.06	3.79	8.88	23.56	5.12	11.68	9.40	8.40	16.74	22.20	-18.36	18.54	16.25	26.60	-9.41	23.97
MSCI All Country World Index Ex USA Net	2.90	4.21	5.79	16.74	0.27	6.81	4.51	4.03	16.36	15.62	-16.00	7.82	10.65	21.51	-14.20	27.19
MSCI All Country Americas Net	4.57	3.44	10.11	27.17	8.06	14.63	12.59	11.30	17.89	26.06	-19.20	25.85	19.16	30.37	-5.75	20.96
MSCI All Country Asia Net	1.48	3.05	5.94	13.97	-3.75	5.26	2.43	4.83	16.86	11.07	-18.61	-2.49	20.92	18.83	-13.73	33.41
MSCI All Country Europe Net	4.82	6.74	8.35	20.03	3.45	8.45	6.13	4.07	18.30	20.04	-16.99	16.21	4.70	24.10	-14.76	25.32
MSCI All Country Europe & Middle East Net	4.36	5.94	7.75	19.19	3.30	8.28	6.01	3.95	17.67	19.24	-16.65	16.77	4.64	23.44	-14.50	24.83
MSCI Emerging Markets Net	0.56	3.52	3.41	12.39	-6.23	3.55	1.40	2.66	17.63	9.83	-20.09	-2.54	18.31	18.44	-14.58	37.28
MSCI Emerging Mrkts. Asia Net	1.42	5.45	5.79	12.58	-6.94	4.84	1.75	4.31	19.66	7.76	-21.11	-5.08	28.38	19.24	-15.45	42.83
MSCI Emerging Mrkts. Eastern Europe Net	3.42	5.64	7.20	41.45	-34.07	-19.20	-14.57	-9.11	50.24	47.20	-82.22	17.74	-11.97	34.51	-4.36	17.21
MSCI Emerg. Mrkts. Europe & Middle East Net	-3.14	-4.24	0.20	9.96	-8.52	-2.06	-0.62	-2.41	17.35	10.63	-35.34	23.93	-7.60	19.33	-8.07	15.86
MSCI Emerging Mrkts. Far East Net	1.62	5.91	4.84	8.22	-10.13	3.18	-0.07	3.31	22.93	4.74	-23.53	-9.27	30.04	20.92	-16.51	43.53
MSCI Emerging Mrkts. Latin America Net	-3.14	-5.56	-10.24	12.58	4.00	2.62	3.52	0.73	24.97	32.71	8.92	-8.09	-13.80	17.46	-6.57	23.74
MSCI Frontier Markets Net	3.76	4.84	5.95	14.88	-2.35	2.68	2.05	0.70	13.51	11.63	-26.34	19.73	1.43	17.99	-16.41	31.86

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<b>U.S. Equity Sector Indexes</b>																
S&P 500 Communication Services	6.58	8.89	20.88	41.80	5.72	14.60	14.09	9.29	22.41	55.80	-39.89	21.57	23.61	32.69	-12.53	-1.25
S&P 500 Consumer Discretionary	0.30	-3.95	0.73	20.82	1.90	11.14	10.25	11.93	25.40	42.41	-37.03	24.43	33.30	27.94	0.83	22.98
S&P 500 Consumer Staples	2.45	5.08	9.18	11.86	7.13	10.61	11.43	8.92	13.81	0.52	-0.62	18.63	10.75	27.61	-8.38	13.49
S&P 500 Energy	-0.39	9.33	12.38	25.16	26.85	15.27	8.46	3.94	28.81	-1.33	65.72	54.64	-33.68	11.81	-18.10	-1.01
S&P 500 Financials	3.16	3.56	11.16	33.70	5.15	12.23	9.67	10.94	20.07	12.15	-10.53	35.04	-1.69	32.13	-13.03	22.18
S&P 500 Health Care	2.38	-0.51	5.78	14.36	6.90	12.55	11.72	11.10	14.93	2.06	-1.95	26.13	13.45	20.82	6.47	22.08
S&P 500 Industrials	1.65	2.34	8.77	29.78	7.31	13.43	10.89	10.53	19.91	18.13	-5.48	21.12	11.06	29.37	-13.29	21.03
S&P 500 Information Technology	10.08	6.15	17.31	38.23	18.92	27.13	23.02	21.97	24.15	57.84	-28.19	34.53	43.89	50.29	-0.29	38.83
S&P 500 Materials	3.22	4.89	7.30	24.48	3.70	14.08	10.20	8.65	21.99	12.55	-12.27	27.28	20.73	24.58	-14.70	23.84
S&P 500 Utilities	8.97	18.10	15.82	15.99	7.12	8.02	9.69	9.13	17.78	-7.08	1.57	17.67	0.48	26.35	4.11	12.11
DJ US Real Estate	4.94	-1.97	-4.80	8.63	-1.85	3.01	4.95	5.68	21.81	12.25	-25.17	38.99	-5.29	28.92	-4.03	9.84
DJ Global World Real Estate	3.31	0.05	-3.80	8.79	-5.05	-0.01	1.19	2.95	19.17	9.34	-24.33	21.35	-6.19	25.33	-6.69	16.94

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<b>Commodity Indexes</b>																
Bloomberg Commodity	1.76	7.95	6.79	10.95	6.85	8.15	4.43	-1.08	15.09	-7.91	16.09	27.11	-3.12	7.69	-11.25	1.70
Bloomberg Sub Energy	-1.40	1.36	3.76	10.13	9.10	0.27	-2.51	-9.60	33.09	-21.64	36.22	52.13	-42.72	11.78	-12.70	-4.31
Bloomberg Sub Gold	1.35	13.51	12.49	17.75	6.42	11.07	9.13	5.57	13.41	12.82	-0.74	-4.28	20.95	18.03	-2.81	12.79
Bloomberg Sub Grains	5.29	8.45	-2.64	-4.27	0.07	6.97	3.52	-2.89	16.29	-13.01	18.00	20.95	19.32	-1.12	-5.50	-11.31
Bloomberg Sub Industrial Metals	1.81	18.01	15.13	20.73	3.09	10.05	5.01	3.39	22.13	-9.15	-2.40	30.34	16.33	6.98	-19.48	29.35
Bloomberg Sub Livestock	-1.30	-2.88	8.63	11.47	3.56	-1.49	-0.80	-3.33	12.16	-1.92	7.44	8.62	-23.42	-5.99	-1.71	6.36
Bloomberg Sub Petroleum	-5.33	0.29	10.29	27.77	24.04	12.36	6.75	-3.17	27.96	-0.09	45.58	62.89	-40.30	33.76	-19.22	9.58
Bloomberg Sub Precious Metals	4.56	18.15	15.98	20.56	5.67	11.96	9.31	5.18	15.43	9.64	0.12	-6.11	25.60	17.02	-4.57	10.94
Bloomberg Sub Silver	14.72	33.49	26.78	28.50	2.47	14.57	9.58	3.75	26.83	-0.26	2.58	-12.26	42.47	13.87	-10.19	5.79
Bloomberg Sub Softs	-0.85	-1.87	6.84	5.74	14.69	13.87	7.47	-0.10	17.78	18.53	-3.48	43.97	2.91	4.26	-22.26	-14.80

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<b>Volatility &amp; Hedge Fund Indexes</b>																
CBOE Volatility (VIX)	-17.44	-3.58	3.78	-27.98	-8.31	-7.14	-2.92	1.26	88.41	-42.55	25.84	-24.31	82.44	-50.94	130.25	-21.37
S&P 500 VIX Short-Term Futures	-14.95	-14.53	-25.41	-66.14	-55.95	-52.24	-47.71	-47.92	47.66	-72.22	-23.06	-72.20	13.23	-67.80	68.11	-72.11
S&P 500 VIX Mid-Term Futures	-9.32	-10.12	-16.04	-43.08	-22.74	-7.90	-6.60	-13.47	23.28	-43.68	1.59	-15.57	74.70	-19.32	27.24	-48.87

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<b>Balanced Indexes</b>																
20% MSCI World - 80% BC US Aggregate Bond	2.24	0.82	0.57	5.78	-1.10	2.57	3.03	2.98	8.83	9.03	-13.91	2.87	10.11	12.40	-1.58	7.13
40% MSCI World - 60% BC US Aggregate Bond	2.80	1.58	2.79	10.38	0.88	5.25	5.06	4.64	10.66	12.61	-14.87	7.41	12.30	16.14	-3.25	10.81
60% MSCI World - 40% BC US Aggregate Bond	3.35	2.34	5.02	15.10	2.84	7.85	6.99	6.22	12.73	16.26	-15.90	12.08	14.02	19.93	-4.99	14.58
80% MSCI World - 20% BC US Aggregate Bond	3.91	3.08	7.26	19.94	4.77	10.36	8.80	7.72	14.93	19.99	-16.99	16.88	15.24	23.77	-6.81	18.44
20% S&P 500 - 80% BC US Aggregate Bond	2.34	0.84	0.92	6.38	-0.54	3.13	3.64	3.65	8.84	9.50	-13.92	4.08	10.51	13.09	-0.63	7.03
40% S&P 500 - 60% BC US Aggregate Bond	2.99	1.63	3.49	11.60	2.01	6.39	6.31	6.00	10.78	13.56	-14.89	9.91	13.14	17.55	-1.39	10.61
60% S&P 500 - 40% BC US Aggregate Bond	3.72	2.44	6.12	17.26	4.74	9.56	8.76	8.24	13.01	17.98	-16.07	16.61	14.04	22.38	-2.63	14.52
80% S&P 500 - 20% BC US Aggregate Bond	4.30	3.16	8.68	22.50	7.07	12.74	11.35	10.53	15.36	21.95	-16.98	22.22	17.13	26.75	-3.26	18.00

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