

Benchmark Review

June 30, 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
U.S. Equity Market Indexes																
DJ Industrial Average	1.23	-1.27	4.79	16.02	6.42	10.33	10.64	11.30	16.73	16.18	-6.86	20.95	9.72	25.34	-3.48	28.11
NASDAQ Composite Index	6.03	8.47	18.57	29.61	7.78	18.21	16.40	16.07	22.07	44.64	-32.54	22.18	44.92	36.69	-2.84	29.64
Russell 1000	3.31	3.57	14.24	23.88	8.74	14.61	13.83	12.51	18.00	26.53	-19.13	26.45	20.96	31.43	-4.78	21.69
Russell 1000 Growth	6.74	8.33	20.70	33.48	11.28	19.34	18.01	16.33	21.21	42.68	-29.14	27.60	38.49	36.39	-1.51	30.21
Russell 1000 Value	-0.94	-2.17	6.62	13.06	5.52	9.01	8.92	8.23	16.60	11.46	-7.54	25.16	2.80	26.54	-8.27	13.66
Russell 2000	-0.93	-3.28	1.73	10.06	-2.58	6.94	5.16	7.00	21.93	16.93	-20.44	14.82	19.96	25.52	-11.01	14.65
Russell 2000 Growth	-0.17	-2.92	4.44	9.14	-4.86	6.17	5.03	7.39	22.80	18.66	-26.36	2.83	34.63	28.48	-9.31	22.17
Russell 2000 Value	-1.69	-3.64	-0.85	10.90	-0.53	7.07	4.73	6.23	21.93	14.65	-14.48	28.27	4.63	22.39	-12.86	7.84
Russell 2500	-1.50	-4.27	2.35	10.47	-0.29	8.31	7.19	7.99	20.91	17.42	-18.37	18.18	19.99	27.77	-10.00	16.81
Russell 3000	3.10	3.22	13.56	23.13	8.05	14.14	13.27	12.15	18.08	25.96	-19.21	25.66	20.89	31.02	-5.24	21.13
Russell Micro Cap	-2.25	-5.27	-0.84	5.96	-7.85	5.55	2.71	5.53	22.79	9.33	-21.96	19.34	20.96	22.43	-13.08	13.17
S&P 500	3.59	4.28	15.29	24.56	10.01	15.05	14.26	12.86	17.86	26.29	-18.11	28.71	18.40	31.49	-4.38	21.83
S&P 500 Equal Weighted	-0.45	-2.63	5.08	11.79	4.84	10.94	10.47	10.04	18.35	13.87	-11.45	29.63	12.83	29.24	-7.64	18.90
S&P MidCap 400	-1.58	-3.45	6.17	13.57	4.47	10.27	8.73	9.14	20.44	16.44	-13.06	24.76	13.66	26.20	-11.08	16.24
S&P MidCap 400 Growth	-1.28	-3.38	11.70	18.82	4.04	10.49	9.02	9.71	20.88	17.49	-18.96	18.90	22.77	26.29	-10.34	19.92
S&P MidCap 400 Value	-1.90	-3.52	0.45	8.17	4.65	9.54	8.03	8.18	20.98	15.39	-6.93	30.65	3.73	26.08	-11.88	12.32
S&P Preferred Stock	-0.31	-0.65	4.90	10.86	-1.21	3.07	3.37	4.06	14.01	12.02	-18.93	6.64	7.97	17.64	-4.25	9.11

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Fixed Income Market Indexes																
Bloomberg U.S. Agg. Bond	0.95	0.07	-0.71	2.63	-3.02	-0.23	1.07	1.35	7.42	5.53	-13.01	-1.54	7.51	8.72	0.01	3.54
Bloomberg Global Agg. Bond	0.14	-1.10	-3.16	0.93	-5.49	-2.02	-0.75	-0.42	8.79	5.72	-16.25	-4.71	9.20	6.84	-1.20	7.39
Bloomberg U.S. Govt/Credit	0.87	0.05	-0.68	2.74	-3.11	-0.07	1.32	1.51	7.30	5.72	-13.58	-1.75	8.93	9.71	-0.42	4.00
Bloomberg Intermediate U.S. Corporate	0.69	0.74	1.00	5.89	-0.77	1.45	2.60	2.36	5.92	7.29	-9.40	-1.00	7.47	10.14	-0.23	3.92
Bloomberg U.S. Govt/Credit Interm.	0.80	0.64	0.49	4.19	-1.18	0.71	1.72	1.55	4.76	5.24	-8.23	-1.44	6.43	6.80	0.88	2.14
Bloomberg U.S. Credit	0.67	-0.05	-0.46	4.42	-2.94	0.54	2.11	2.21	8.98	8.18	-15.26	-1.08	9.35	13.80	-2.11	6.18
Bloomberg U.S. Treasury	1.01	0.10	-0.86	1.55	-3.26	-0.65	0.62	0.91	6.36	4.05	-12.46	-2.32	8.00	6.86	0.86	2.31
Bloomberg U.S. 3 Year Treasury	0.71	0.71	0.56	3.94	-0.86	0.53	1.28	0.96	3.42	4.18	-6.26	-1.16	4.63	4.35	1.26	0.52
Bloomberg U.S. 5 Year Treasury	1.03	0.36	-0.42	2.82	-2.59	-0.32	0.92	0.78	5.44	3.93	-9.74	-2.80	7.26	5.82	1.42	0.67
Bloomberg U.S. 10 Year Treasury	1.29	-0.36	-2.03	-0.66	-5.23	-1.77	0.16	0.54	9.10	3.21	-16.33	-3.60	10.61	8.90	-0.00	2.14
Bloomberg U.S. 30 Year Treasury	1.91	-2.23	-6.20	-7.60	-12.48	-5.58	-2.73	-0.08	17.00	1.93	-33.29	-4.62	18.72	16.43	-2.72	9.14
Bloomberg U.S. Corporate Bond	0.64	-0.09	-0.49	4.63	-3.03	0.62	2.24	2.34	9.37	8.52	-15.76	-1.04	9.89	14.54	-2.51	6.42
Bloomberg U.S. Corporate High Yield	0.94	1.09	2.58	10.44	1.64	3.92	4.50	4.31	8.40	13.44	-11.19	5.28	7.11	14.32	-2.08	7.50
Bloomberg U.S. Treasury TIPS	0.78	0.79	0.70	2.71	-1.33	2.07	2.53	1.91	7.20	3.90	-11.85	5.96	10.99	8.43	-1.26	3.01
Bloomberg Municipal	1.53	-0.02	-0.40	3.21	-0.88	1.16	2.06	2.39	7.43	6.40	-8.53	1.52	5.21	7.54	1.28	5.45
Bloomberg Municipal 5 Year	1.05	-0.42	-0.79	2.26	-0.60	0.83	1.55	1.56	5.03	4.31	-5.26	0.34	4.29	5.45	1.69	3.14
Bloomberg Global Agg. Ex US	-0.51	-2.11	-5.26	-0.66	-7.48	-3.56	-2.32	-1.86	10.27	5.72	-18.70	-7.05	10.11	5.09	-2.15	10.51

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International Equity Market Indexes																
MSCI EAFE Net	-1.61	-0.42	5.34	11.54	2.89	6.46	5.55	4.33	16.92	18.24	-14.45	11.26	7.82	22.01	-13.79	25.03
MSCI World Net	2.03	2.63	11.75	20.19	6.86	11.78	10.85	9.16	17.22	23.79	-18.14	21.82	15.90	27.67	-8.71	22.40
MSCI World Ex US Net	-1.66	-0.60	4.96	11.22	2.82	6.55	5.66	4.27	16.89	17.94	-14.29	12.62	7.59	22.49	-14.09	24.21
MSCI EAFE Small Cap Net	-3.04	-1.84	0.51	7.78	-3.35	4.19	2.36	4.30	18.41	13.16	-21.39	10.10	12.34	24.96	-17.89	33.01
MSCI All Country World Index Net	2.23	2.87	11.30	19.38	5.43	10.76	9.90	8.43	16.74	22.20	-18.36	18.54	16.25	26.60	-9.41	23.97
MSCI All Country World Index Ex USA Net	-0.10	0.96	5.69	11.62	0.46	5.55	4.83	3.84	16.36	15.62	-16.00	7.82	10.65	21.51	-14.20	27.19
MSCI All Country Americas Net	3.20	3.48	13.63	23.00	8.26	13.83	13.09	11.38	17.89	26.06	-19.20	25.85	19.16	30.37	-5.75	20.96
MSCI All Country Asia Net	2.40	2.72	8.48	13.05	-2.93	4.65	3.51	4.71	16.86	11.07	-18.61	-2.49	20.92	18.83	-13.73	33.41
MSCI All Country Europe Net	-2.21	0.69	5.96	11.98	3.12	6.57	5.86	3.84	18.30	20.04	-16.99	16.21	4.70	24.10	-14.76	25.32
MSCI All Country Europe & Middle East Net	-1.97	0.39	5.63	11.60	3.00	6.48	5.78	3.75	17.67	19.24	-16.65	16.77	4.64	23.44	-14.50	24.83
MSCI Emerging Markets Net	3.94	5.00	7.49	12.55	-5.07	3.10	2.78	2.79	17.63	9.83	-20.09	-2.54	18.31	18.44	-14.58	37.28
MSCI Emerging Mrkts. Asia Net	4.96	7.44	11.04	15.06	-5.45	4.57	3.39	4.53	19.66	7.76	-21.11	-5.08	28.38	19.24	-15.45	42.83
MSCI Emerging Mrkts. Eastern Europe Net	1.20	6.70	8.49	28.20	-34.29	-20.19	-14.36	-9.31	50.24	47.20	-82.22	17.74	-11.97	34.51	-4.36	17.21
MSCI Emerg. Mrkts. Europe & Middle East Net	2.26	-1.41	2.46	8.50	-8.50	-2.68	-0.14	-2.14	17.35	10.63	-35.34	23.93	-7.60	19.33	-8.07	15.86
MSCI Emerging Mrkts. Far East Net	4.36	6.61	9.41	10.44	-8.91	2.59	1.53	3.48	22.93	4.74	-23.53	-9.27	30.04	20.92	-16.51	43.53
MSCI Emerging Mrkts. Latin America Net	-6.06	-12.20	-15.68	-5.59	0.95	0.14	2.98	-0.31	24.97	32.71	8.92	-8.09	-13.80	17.46	-6.57	23.74
MSCI Frontier Markets Net	-0.02	0.65	5.93	12.32	-3.21	2.21	2.66	0.71	13.51	11.63	-26.34	19.73	1.43	17.99	-16.41	31.86

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U.S. Equity Sector Indexes																
S&P 500 Communication Services	4.80	9.37	26.68	44.87	6.42	14.72	14.54	9.93	22.51	55.80	-39.89	21.57	23.61	32.69	-12.53	-1.25
S&P 500 Consumer Discretionary	4.89	0.65	5.66	13.08	2.25	10.54	10.48	12.24	25.46	42.41	-37.03	24.43	33.30	27.94	0.83	22.98
S&P 500 Consumer Staples	-0.18	1.35	8.98	8.15	7.13	9.45	10.58	8.92	13.81	0.52	-0.62	18.63	10.75	27.61	-8.38	13.49
S&P 500 Energy	-1.29	-2.42	10.93	15.85	24.42	12.96	8.09	3.30	28.85	-1.33	65.72	54.64	-33.68	11.81	-18.10	-1.01
S&P 500 Financials	-0.89	-2.03	10.17	24.21	5.90	10.58	9.86	10.58	19.98	12.15	-10.53	35.04	-1.69	32.13	-13.03	22.18
S&P 500 Health Care	1.91	-0.96	7.81	11.68	6.75	11.53	11.77	11.07	14.91	2.06	-1.95	26.13	13.45	20.82	6.47	22.08
S&P 500 Industrials	-0.94	-2.90	7.75	15.53	7.78	11.52	11.34	10.39	19.86	18.13	-5.48	21.12	11.06	29.37	-13.29	21.03
S&P 500 Information Technology	9.32	13.81	28.24	41.78	19.79	27.17	24.94	22.78	24.37	57.84	-28.19	34.53	43.89	50.29	-0.29	38.83
S&P 500 Materials	-3.03	-4.50	4.05	8.69	4.53	10.90	9.58	8.14	21.83	12.55	-12.27	27.28	20.73	24.58	-14.70	23.84
S&P 500 Utilities	-5.51	4.66	9.44	7.82	5.88	6.11	8.16	8.04	18.07	-7.08	1.57	17.67	0.48	26.35	4.11	12.11
DJ US Real Estate	2.02	-1.73	-2.87	4.79	-1.95	3.04	4.61	5.77	21.80	12.25	-25.17	38.99	-5.29	28.92	-4.03	9.84
DJ Global World Real Estate	0.01	-2.75	-3.79	4.50	-5.32	-0.52	1.07	2.83	19.16	9.34	-24.33	21.35	-6.19	25.33	-6.69	16.94

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Commodity Indexes																
Bloomberg Commodity	-1.54	2.89	5.14	5.00	5.65	7.25	4.78	-1.29	15.09	-7.91	16.09	27.11	-3.12	7.69	-11.25	1.70
Bloomberg Sub Energy	4.07	2.99	7.98	5.70	6.64	0.29	-2.30	-9.42	33.09	-21.64	36.22	52.13	-42.72	11.78	-12.70	-4.31
Bloomberg Sub Gold	0.15	4.93	12.66	20.62	9.09	9.40	9.84	4.96	13.41	12.82	-0.74	-4.28	20.95	18.03	-2.81	12.79
Bloomberg Sub Grains	-10.89	-5.73	-13.24	-19.68	-3.66	4.47	3.69	-3.14	16.29	-13.01	18.00	20.95	19.32	-1.12	-5.50	-11.31
Bloomberg Sub Industrial Metals	-5.34	9.78	8.98	12.99	2.32	8.41	4.91	2.56	22.13	-9.15	-2.40	30.34	16.33	6.98	-19.48	29.35
Bloomberg Sub Livestock	0.89	-1.24	9.60	2.39	4.85	-0.62	-1.11	-3.93	12.16	-1.92	7.44	8.62	-23.42	-5.99	-1.71	6.36
Bloomberg Sub Petroleum	5.86	0.01	16.76	28.03	23.06	12.14	7.09	-2.96	27.96	-0.09	45.58	62.89	-40.30	33.76	-19.22	9.58
Bloomberg Sub Precious Metals	-0.82	7.94	15.03	22.48	7.93	10.21	9.77	4.31	15.43	9.64	0.12	-6.11	25.60	17.02	-4.57	10.94
Bloomberg Sub Silver	-3.53	17.79	22.30	27.60	3.58	12.65	9.27	2.17	26.83	-0.26	2.58	-12.26	42.47	13.87	-10.19	5.79
Bloomberg Sub Softs	4.03	1.37	11.15	17.75	16.13	14.43	9.58	0.55	17.78	18.53	-3.48	43.97	2.91	4.26	-22.26	-14.80

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Volatility & Hedge Fund Indexes																
CBOE Volatility (VIX)	-3.72	-4.38	-0.08	-8.46	-7.72	-3.78	-4.20	0.73	88.41	-42.55	25.84	-24.31	82.44	-50.94	130.25	-21.37
S&P 500 VIX Short-Term Futures	-5.37	-15.78	-29.41	-55.71	-54.33	-51.04	-48.10	-47.36	47.34	-72.22	-23.06	-72.20	13.23	-67.80	68.11	-72.11
S&P 500 VIX Mid-Term Futures	2.62	-9.48	-13.84	-28.79	-20.74	-6.21	-6.13	-12.34	23.35	-43.68	1.59	-15.57	74.70	-19.32	27.24	-48.87

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Balanced Indexes																
20% MSCI World - 80% BC US Aggregate Bond	1.17	0.58	1.74	6.02	-1.00	2.35	3.25	3.06	8.84	9.03	-13.91	2.87	10.11	12.40	-1.58	7.13
40% MSCI World - 60% BC US Aggregate Bond	1.39	1.09	4.21	9.47	1.00	4.85	5.32	4.70	10.67	12.61	-14.87	7.41	12.30	16.14	-3.25	10.81
60% MSCI World - 40% BC US Aggregate Bond	1.60	1.60	6.70	12.98	2.98	7.27	7.29	6.27	12.74	16.26	-15.90	12.08	14.02	19.93	-4.99	14.58
80% MSCI World - 20% BC US Aggregate Bond	1.82	2.12	9.21	16.56	4.93	9.58	9.14	7.76	14.94	19.99	-16.99	16.88	15.24	23.77	-6.81	18.44
20% S&P 500 - 80% BC US Aggregate Bond	1.48	0.91	2.41	6.82	-0.40	2.95	3.89	3.76	8.87	9.50	-13.92	4.08	10.51	13.09	-0.63	7.03
40% S&P 500 - 60% BC US Aggregate Bond	2.01	1.75	5.58	11.10	2.23	6.08	6.63	6.12	10.81	13.56	-14.89	9.91	13.14	17.55	-1.39	10.61
60% S&P 500 - 40% BC US Aggregate Bond	2.61	2.70	8.89	15.77	5.03	9.09	9.17	8.38	13.05	17.98	-16.07	16.61	14.04	22.38	-2.63	14.52
80% S&P 500 - 20% BC US Aggregate Bond	3.07	3.44	12.01	19.97	7.43	12.14	11.83	10.68	15.40	21.95	-16.98	22.22	17.13	26.75	-3.26	18.00

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