



# Benchmark Review

July 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	4.51	8.53	9.52	17.22	7.52	11.06	10.58	11.96	16.88	16.18	-6.86	20.95	9.72	25.34	-3.48	28.11
NASDAQ Composite Index	-0.73	12.61	17.71	23.62	7.09	17.53	15.84	16.08	22.13	44.64	-32.54	22.18	44.92	36.69	-2.84	29.64
Russell 1000	1.46	9.75	15.90	21.50	8.52	14.59	13.46	12.86	17.99	26.53	-19.13	26.45	20.96	31.43	-4.78	21.69
Russell 1000 Growth	-1.70	11.21	18.65	26.94	9.46	18.41	17.11	16.31	21.23	42.68	-29.14	27.60	38.49	36.39	-1.51	30.21
Russell 1000 Value	5.11	7.42	12.08	14.80	7.01	9.92	9.12	8.96	16.80	11.46	-7.54	25.16	2.80	26.54	-8.27	13.66
Russell 2000	10.16	14.62	12.07	14.25	1.85	8.91	6.56	8.72	22.59	16.93	-20.44	14.82	19.96	25.52	-11.01	14.65
Russell 2000 Growth	8.19	13.79	12.99	12.80	-1.12	7.64	6.11	8.92	23.21	18.66	-26.36	2.83	34.63	28.48	-9.31	22.17
Russell 2000 Value	12.19	15.45	11.23	15.68	4.62	9.53	6.45	8.13	22.88	14.65	-14.48	28.27	4.63	22.39	-12.86	7.84
Russell 2500	7.43	10.22	9.95	13.06	2.72	9.65	8.13	9.31	21.29	17.42	-18.37	18.18	19.99	27.77	-10.00	16.81
Russell 3000	1.86	9.97	15.67	21.07	8.11	14.23	13.00	12.58	18.08	25.96	-19.21	25.66	20.89	31.02	-5.24	21.13
Russell Micro Cap	11.87	14.89	10.93	12.53	-2.51	8.24	4.66	7.47	23.66	9.33	-21.96	19.34	20.96	22.43	-13.08	13.17
S&P 500	1.22	10.05	16.70	22.15	9.60	15.00	13.80	13.15	17.84	26.29	-18.11	28.71	18.40	31.49	-4.38	21.83
S&P 500 Equal Weighted	4.49	6.94	9.79	12.90	5.93	11.73	10.70	10.78	18.49	13.87	-11.45	29.63	12.83	29.24	-7.64	18.90
S&P MidCap 400	5.81	8.70	12.33	15.41	6.33	11.26	9.44	10.24	20.67	16.44	-13.06	24.76	13.66	26.20	-11.08	16.24
S&P MidCap 400 Growth	4.22	7.13	16.41	19.31	5.15	11.13	9.52	10.64	20.99	17.49	-18.96	18.90	22.77	26.29	-10.34	19.92
S&P MidCap 400 Value	7.56	10.45	8.05	11.37	7.29	10.90	8.96	9.46	21.36	15.39	-6.93	30.65	3.73	26.08	-11.88	12.32
S&P Preferred Stock	0.67	3.14	5.60	9.86	-1.06	2.80	3.40	4.17	14.02	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	2.34	5.06	1.61	5.10	-2.63	0.19	1.46	1.61	7.54	5.53	-13.01	-1.54	7.51	8.72	0.01	3.54
Bloomberg Global Agg. Bond	2.76	4.26	-0.49	3.00	-5.05	-1.43	-0.27	-0.06	8.94	5.72	-16.25	-4.71	9.20	6.84	-1.20	7.39
Bloomberg U.S. Govt/Credit	2.24	4.78	1.55	5.12	-2.82	0.35	1.68	1.74	7.38	5.72	-13.58	-1.75	8.93	9.71	-0.42	4.00
Bloomberg Intermediate U.S. Corporate	1.99	4.15	3.01	7.36	-0.38	1.80	2.86	2.58	6.03	7.29	-9.40	-1.00	7.47	10.14	-0.23	3.92
Bloomberg U.S. Govt/Credit Interm.	1.88	3.93	2.37	5.87	-0.81	1.09	2.03	1.76	4.89	5.24	-8.23	-1.44	6.43	6.80	0.88	2.14
Bloomberg U.S. Credit	2.35	4.91	1.88	6.54	-2.61	0.90	2.38	2.46	9.02	8.18	-15.26	-1.08	9.35	13.80	-2.11	6.18
Bloomberg U.S. Treasury	2.19	4.72	1.31	4.14	-3.00	-0.20	1.06	1.14	6.47	4.05	-12.46	-2.32	8.00	6.86	0.86	2.31
Bloomberg U.S. 3 Year Treasury	1.60	3.27	2.17	5.28	-0.46	0.89	1.57	1.15	3.57	4.18	-6.26	-1.16	4.63	4.35	1.26	0.52
Bloomberg U.S. 5 Year Treasury	2.18	4.56	1.76	4.97	-2.21	0.17	1.34	1.05	5.62	3.93	-9.74	-2.80	7.26	5.82	1.42	0.67
Bloomberg U.S. 10 Year Treasury	2.90	6.20	0.81	3.08	-5.02	-1.19	0.75	0.84	9.17	3.21	-16.33	-3.60	10.61	8.90	-0.00	2.14
Bloomberg U.S. 30 Year Treasury	3.64	8.59	-2.78	-1.78	-12.61	-4.92	-1.88	0.20	16.76	1.93	-33.29	-4.62	18.72	16.43	-2.72	9.14
Bloomberg U.S. Corporate Bond	2.38	4.96	1.89	6.76	-2.71	0.98	2.50	2.58	9.40	8.52	-15.76	-1.04	9.89	14.54	-2.51	6.42
Bloomberg U.S. Corporate High Yield	1.94	4.04	4.58	11.05	2.17	4.20	4.65	4.65	8.45	13.44	-11.19	5.28	7.11	14.32	-2.08	7.50
Bloomberg U.S. Treasury TIPS	1.78	4.34	2.50	4.41	-1.61	2.36	2.91	2.09	7.11	3.90	-11.85	5.96	10.99	8.43	-1.26	3.01
Bloomberg Municipal	0.91	2.16	0.50	3.74	-0.86	1.18	2.18	2.47	7.49	6.40	-8.53	1.52	5.21	7.54	1.28	5.45
Bloomberg Municipal 5 Year	1.03	1.43	0.22	2.99	-0.48	0.87	1.66	1.65	5.10	4.31	-5.26	0.34	4.29	5.45	1.69	3.14
Bloomberg Global Agg. Ex US	3.15	3.66	-2.27	1.17	-6.98	-2.82	-1.76	-1.42	10.40	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	2.93	5.19	8.43	11.21	3.63	7.36	5.63	4.84	17.00	18.24	-14.45	11.26	7.82	22.01	-13.79	25.03
MSCI World Net	1.76	8.47	13.72	18.34	6.85	12.06	10.60	9.53	17.23	23.79	-18.14	21.82	15.90	27.67	-8.71	22.40
MSCI World Ex US Net	3.14	5.31	8.25	11.12	3.66	7.48	5.77	4.78	16.99	17.94	-14.29	12.62	7.59	22.49	-14.09	24.21
MSCI EAFE Small Cap Net	5.70	6.93	6.24	9.09	-2.10	5.50	3.20	5.12	18.75	13.16	-21.39	10.10	12.34	24.96	-17.89	33.01
MSCI All Country World Index Net	1.61	8.09	13.10	17.02	5.75	11.05	9.65	8.74	16.78	22.20	-18.36	18.54	16.25	26.60	-9.41	23.97
MSCI All Country World Index Ex USA Net	2.32	5.19	8.14	9.75	1.79	6.29	4.81	4.18	16.37	15.62	-16.00	7.82	10.65	21.51	-14.20	27.19
MSCI All Country Americas Net	1.37	9.40	15.19	20.55	8.00	13.83	12.67	11.67	17.90	26.06	-19.20	25.85	19.16	30.37	-5.75	20.96
MSCI All Country Asia Net	2.02	6.02	10.68	9.89	-0.46	5.28	3.74	4.68	16.68	11.07	-18.61	-2.49	20.92	18.83	-13.73	33.41
MSCI All Country Europe Net	2.11	4.67	8.20	10.84	3.23	7.42	5.65	4.47	18.35	20.04	-16.99	16.21	4.70	24.10	-14.76	25.32
MSCI All Country Europe & Middle East Net	2.22	4.58	7.98	10.51	3.15	7.32	5.58	4.38	17.71	19.24	-16.65	16.77	4.64	23.44	-14.50	24.83
MSCI Emerging Markets Net	0.30	4.84	7.81	6.27	-2.74	3.41	2.46	2.63	17.39	9.83	-20.09	-2.54	18.31	18.44	-14.58	37.28
MSCI Emerging Mrkts. Asia Net	-0.28	6.16	10.73	8.00	-2.84	4.84	3.22	4.15	19.36	7.76	-21.11	-5.08	28.38	19.24	-15.45	42.83
MSCI Emerging Mrkts. Eastern Europe Net	-2.20	2.35	6.10	16.77	-34.75	-20.43	-15.44	-8.75	50.20	47.20	-82.22	17.74	-11.97	34.51	-4.36	17.21
MSCI Emerg. Mrkts. Europe & Middle East Net	3.13	2.15	5.67	6.50	-7.75	-2.22	-0.38	-1.40	17.48	10.63	-35.34	23.93	-7.60	19.33	-8.07	15.86
MSCI Emerging Mrkts. Far East Net	-1.61	4.34	7.64	1.56	-6.37	2.48	1.26	2.94	22.52	4.74	-23.53	-9.27	30.04	20.92	-16.51	43.53
MSCI Emerging Mrkts. Latin America Net	1.03	-8.07	-14.81	-9.28	2.71	0.32	1.65	-0.31	25.09	32.71	8.92	-8.09	-13.80	17.46	-6.57	23.74
MSCI Frontier Markets Net	1.86	5.67	7.90	6.95	-2.51	2.08	2.36	0.73	13.46	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	-4.01	7.21	21.60	30.03	3.76	13.03	13.33	9.09	22.61	55.80	-39.89	21.57	23.61	32.69	-12.53	-1.25
S&P 500 Consumer Discretionary	1.66	6.95	7.41	12.21	2.64	10.69	10.44	12.58	25.47	42.41	-37.03	24.43	33.30	27.94	0.83	22.98
S&P 500 Consumer Staples	1.93	4.24	11.08	7.93	6.92	9.33	10.20	9.49	13.79	0.52	-0.62	18.63	10.75	27.61	-8.38	13.49
S&P 500 Energy	2.11	0.40	13.27	10.15	28.95	13.84	8.22	3.86	28.18	-1.33	65.72	54.64	-33.68	11.81	-18.10	-1.01
S&P 500 Financials	6.46	8.85	17.29	26.11	8.29	11.44	10.07	11.44	20.25	12.15	-10.53	35.04	-1.69	32.13	-13.03	22.18
S&P 500 Health Care	2.65	7.11	10.67	13.48	5.98	12.48	11.07	11.35	14.75	2.06	-1.95	26.13	13.45	20.82	6.47	22.08
S&P 500 Industrials	4.90	5.63	13.03	17.77	9.19	12.44	10.91	11.38	20.00	18.13	-5.48	21.12	11.06	29.37	-13.29	21.03
S&P 500 Information Technology	-2.09	17.83	25.57	35.20	17.46	25.81	24.07	22.34	24.43	57.84	-28.19	34.53	43.89	50.29	-0.29	38.83
S&P 500 Materials	4.39	4.48	8.61	9.71	5.32	11.94	9.83	8.81	21.92	12.55	-12.27	27.28	20.73	24.58	-14.70	23.84
S&P 500 Utilities	6.79	9.95	16.86	12.36	6.71	7.57	9.02	9.51	18.30	-7.08	1.57	17.67	0.48	26.35	4.11	12.11
DJ US Real Estate	7.50	15.08	4.41	10.67	-1.08	4.16	5.72	6.55	22.06	12.25	-25.17	38.99	-5.29	28.92	-4.03	9.84
DJ Global World Real Estate	6.73	10.27	2.68	7.86	-3.90	0.68	2.02	3.39	19.55	9.34	-24.33	21.35	-6.19	25.33	-6.69	16.94

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<b>Commodity Indexes</b>																
Bloomberg Commodity	-4.04	-3.85	0.90	-5.17	3.58	6.51	4.43	-1.19	15.33	-7.91	16.09	27.11	-3.12	7.69	-11.25	1.70
Bloomberg Sub Energy	-7.65	-5.23	-0.28	-12.76	2.55	-1.32	-2.87	-9.41	32.91	-21.64	36.22	52.13	-42.72	11.78	-12.70	-4.31
Bloomberg Sub Gold	4.13	5.69	17.31	22.45	9.72	10.07	11.03	5.72	12.75	12.82	-0.74	-4.28	20.95	18.03	-2.81	12.79
Bloomberg Sub Grains	-6.48	-12.26	-18.87	-26.15	-4.59	4.29	1.47	-2.70	17.74	-13.01	18.00	20.95	19.32	-1.12	-5.50	-11.31
Bloomberg Sub Industrial Metals	-6.78	-10.16	1.59	-1.50	-1.33	6.60	4.52	1.62	22.56	-9.15	-2.40	30.34	16.33	6.98	-19.48	29.35
Bloomberg Sub Livestock	2.35	1.92	12.17	1.94	5.76	-0.72	0.01	-3.37	12.07	-1.92	7.44	8.62	-23.42	-5.99	-1.71	6.36
Bloomberg Sub Petroleum	-3.13	-2.91	13.11	5.96	20.82	11.29	7.35	-2.72	27.96	-0.09	45.58	62.89	-40.30	33.76	-19.22	9.58
Bloomberg Sub Precious Metals	2.68	6.48	18.12	20.93	8.45	10.28	10.76	4.91	14.85	9.64	0.12	-6.11	25.60	17.02	-4.57	10.94
Bloomberg Sub Silver	-1.63	8.86	20.31	15.19	3.87	10.74	9.67	2.32	26.58	-0.26	2.58	-12.26	42.47	13.87	-10.19	5.79
Bloomberg Sub Softs	-2.27	0.80	8.62	9.25	12.95	15.13	10.23	0.52	17.73	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)	31.51	4.54	31.41	20.03	-3.56	0.30	4.13	-0.35	89.67	-42.55	25.84	-24.31	82.44	-50.94	130.25	-21.37
S&P 500 VIX Short-Term Futures	6.19	-14.54	-25.04	-48.33	-53.85	-49.85	-46.04	-47.67	47.57	-72.22	-23.06	-72.20	13.23	-67.80	68.11	-72.11
S&P 500 VIX Mid-Term Futures	1.01	-6.00	-12.97	-24.05	-21.50	-6.24	-4.92	-12.37	23.17	-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	2.22	5.73	4.00	7.71	-0.68	2.74	3.51	3.34	8.91	9.03	-13.91	2.87	10.11	12.40	-1.58	7.13
40% MSCI World - 60% BC US Aggregate Bond	2.11	6.41	6.41	10.34	1.24	5.22	5.47	5.00	10.71	12.61	-14.87	7.41	12.30	16.14	-3.25	10.81
60% MSCI World - 40% BC US Aggregate Bond	1.99	7.10	8.83	12.99	3.14	7.61	7.31	6.60	12.76	16.26	-15.90	12.08	14.02	19.93	-4.99	14.58
80% MSCI World - 20% BC US Aggregate Bond	1.88	7.78	11.26	15.65	5.01	9.89	9.02	8.10	14.95	19.99	-16.99	16.88	15.24	23.77	-6.81	18.44
20% S&P 500 - 80% BC US Aggregate Bond	2.11	6.05	4.58	8.44	-0.15	3.28	4.12	4.02	8.92	9.50	-13.92	4.08	10.51	13.09	-0.63	7.03
40% S&P 500 - 60% BC US Aggregate Bond	1.89	7.05	7.57	11.81	2.31	6.33	6.70	6.39	10.82	13.56	-14.89	9.91	13.14	17.55	-1.39	10.61
60% S&P 500 - 40% BC US Aggregate Bond	1.63	8.16	10.66	15.34	4.93	9.23	9.05	8.66	13.04	17.98	-16.07	16.61	14.04	22.38	-2.63	14.52
80% S&P 500 - 20% BC US Aggregate Bond	1.44	9.04	13.63	18.67	7.19	12.20	11.55	10.97	15.38	21.95	-16.98	22.22	17.13	26.75	-3.26	18.00

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