



Benchmark Review

August 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
U.S. Equity Market Indexes																
DJ Industrial Average	2.03	7.95	11.75	22.06	7.71	11.80	10.48	11.79	16.89	16.18	-6.86	20.95	9.72	25.34	-3.48	28.11
NASDAQ Composite Index	0.74	6.03	18.57	27.15	5.93	18.29	14.89	15.60	22.13	44.64	-32.54	22.18	44.92	36.69	-2.84	29.64
Russell 1000	2.37	7.30	18.64	26.60	8.34	15.55	13.26	12.66	17.97	26.53	-19.13	26.45	20.96	31.43	-4.78	21.69
Russell 1000 Growth	2.08	7.11	21.12	30.75	8.87	19.08	16.47	16.03	21.18	42.68	-29.14	27.60	38.49	36.39	-1.51	30.21
Russell 1000 Value	2.68	6.92	15.08	21.15	7.25	11.16	9.33	8.85	16.83	11.46	-7.54	25.16	2.80	26.54	-8.27	13.66
Russell 2000	-1.49	7.51	10.39	18.47	0.60	9.68	5.55	8.03	22.59	16.93	-20.44	14.82	19.96	25.52	-11.01	14.65
Russell 2000 Growth	-1.11	6.81	11.74	17.67	-2.07	8.35	4.85	8.21	23.19	18.66	-26.36	2.83	34.63	28.48	-9.31	22.17
Russell 2000 Value	-1.88	8.23	9.15	19.25	3.05	10.38	5.70	7.46	22.88	14.65	-14.48	28.27	4.63	22.39	-12.86	7.84
Russell 2500	-0.26	5.55	9.67	17.37	1.87	10.49	7.33	8.76	21.27	17.42	-18.37	18.18	19.99	27.77	-10.00	16.81
Russell 3000	2.18	7.30	18.19	26.14	7.87	15.19	12.75	12.36	18.06	25.96	-19.21	25.66	20.89	31.02	-5.24	21.13
Russell Micro Cap	-2.75	6.35	7.88	17.23	-4.54	9.05	3.45	6.70	23.62	9.33	-21.96	19.34	20.96	22.43	-13.08	13.17
S&P 500	2.43	7.39	19.53	27.14	9.38	15.92	13.64	12.98	17.82	26.29	-18.11	28.71	18.40	31.49	-4.38	21.83
S&P 500 Equal Weighted	2.50	6.61	12.53	19.49	5.97	12.99	10.79	10.59	18.50	13.87	-11.45	29.63	12.83	29.24	-7.64	18.90
S&P MidCap 400	-0.08	4.05	12.24	18.75	5.62	12.20	8.85	9.68	20.66	16.44	-13.06	24.76	13.66	26.20	-11.08	16.24
S&P MidCap 400 Growth	-0.74	2.12	15.54	20.94	4.39	11.66	8.71	10.03	21.00	17.49	-18.96	18.90	22.77	26.29	-10.34	19.92
S&P MidCap 400 Value	0.64	6.19	8.74	16.44	6.67	12.28	8.62	8.97	21.34	15.39	-6.93	30.65	3.73	26.08	-11.88	12.32
S&P Preferred Stock	2.87	3.24	8.63	14.00	-0.06	3.23	3.69	4.29	14.12	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	1.44	4.79	3.07	7.30	-2.11	-0.04	1.59	1.64	7.54	5.53	-13.01	-1.54	7.51	8.72	0.01	3.54
Bloomberg Global Agg. Bond	2.37	5.34	1.86	6.90	-4.18	-1.37	0.10	0.12	8.94	5.72	-16.25	-4.71	9.20	6.84	-1.20	7.39
Bloomberg U.S. Govt/Credit	1.38	4.56	2.95	7.21	-2.31	-0.02	1.80	1.76	7.38	5.72	-13.58	-1.75	8.93	9.71	-0.42	4.00
Bloomberg Intermediate U.S. Corporate	1.30	4.03	4.35	8.95	0.11	1.71	2.98	2.63	6.03	7.29	-9.40	-1.00	7.47	10.14	-0.23	3.92
Bloomberg U.S. Govt/Credit Interm.	1.15	3.87	3.55	7.11	-0.38	0.96	2.12	1.80	4.89	5.24	-8.23	-1.44	6.43	6.80	0.88	2.14
Bloomberg U.S. Credit	1.55	4.63	3.46	8.98	-2.03	0.59	2.56	2.47	9.02	8.18	-15.26	-1.08	9.35	13.80	-2.11	6.18
Bloomberg U.S. Treasury	1.28	4.54	2.60	6.02	-2.53	-0.61	1.14	1.17	6.47	4.05	-12.46	-2.32	8.00	6.86	0.86	2.31
Bloomberg U.S. 3 Year Treasury	1.04	3.40	3.24	6.12	-0.09	0.85	1.68	1.21	3.57	4.18	-6.26	-1.16	4.63	4.35	1.26	0.52
Bloomberg U.S. 5 Year Treasury	1.18	4.45	2.95	6.26	-1.74	-0.04	1.41	1.09	5.62	3.93	-9.74	-2.80	7.26	5.82	1.42	0.67
Bloomberg U.S. 10 Year Treasury	1.37	5.65	2.19	5.43	-4.45	-1.84	0.80	0.76	9.17	3.21	-16.33	-3.60	10.61	8.90	-0.00	2.14
Bloomberg U.S. 30 Year Treasury	2.35	8.10	-0.49	3.77	-11.85	-6.70	-1.78	-0.03	16.76	1.93	-33.29	-4.62	18.72	16.43	-2.72	9.14
Bloomberg U.S. Corporate Bond	1.57	4.66	3.49	9.29	-2.10	0.67	2.68	2.60	9.40	8.52	-15.76	-1.04	9.89	14.54	-2.51	6.42
Bloomberg U.S. Corporate High Yield	1.63	4.59	6.29	12.55	2.55	4.46	4.80	4.65	8.45	13.44	-11.19	5.28	7.11	14.32	-2.08	7.50
Bloomberg U.S. Treasury TIPS	0.78	3.39	3.30	6.17	-1.30	2.04	2.92	2.13	7.11	3.90	-11.85	5.96	10.99	8.43	-1.26	3.01
Bloomberg Municipal	0.79	3.27	1.30	6.09	-0.47	1.02	2.27	2.43	7.49	6.40	-8.53	1.52	5.21	7.54	1.28	5.45
Bloomberg Municipal 5 Year	1.29	3.40	1.52	5.03	-0.03	1.01	1.88	1.71	5.10	4.31	-5.26	0.34	4.29	5.45	1.69	3.14
Bloomberg Global Agg. Ex US	3.13	5.85	0.79	6.44	-5.83	-2.53	-1.20	-1.13	10.40	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	3.25	4.56	11.96	19.40	4.13	8.61	6.54	5.20	17.00	18.24	-14.45	11.26	7.82	22.01	-13.79	25.03
MSCI World Net	2.64	6.58	16.72	24.43	6.90	13.11	10.86	9.57	17.23	23.79	-18.14	21.82	15.90	27.67	-8.71	22.40
MSCI World Ex US Net	3.34	4.81	11.86	19.45	4.24	8.72	6.69	5.12	16.99	17.94	-14.29	12.62	7.59	22.49	-14.09	24.21
MSCI EAFE Small Cap Net	1.98	4.52	8.34	15.08	-2.39	6.45	3.67	5.35	18.75	13.16	-21.39	10.10	12.34	24.96	-17.89	33.01
MSCI All Country World Index Net	2.54	6.51	15.97	23.44	5.77	12.14	9.97	8.78	16.78	22.20	-18.36	18.54	16.25	26.60	-9.41	23.97
MSCI All Country World Index Ex USA Net	2.85	5.13	11.22	18.21	2.11	7.56	5.68	4.42	16.37	15.62	-16.00	7.82	10.65	21.51	-14.20	27.19
MSCI All Country Americas Net	2.44	7.16	18.00	25.91	7.88	14.82	12.62	11.51	17.90	26.06	-19.20	25.85	19.16	30.37	-5.75	20.96
MSCI All Country Asia Net	1.41	5.94	12.23	17.23	-0.84	6.21	4.07	4.89	16.68	11.07	-18.61	-2.49	20.92	18.83	-13.73	33.41
MSCI All Country Europe Net	3.83	3.69	12.35	19.80	3.97	8.81	6.84	4.83	18.35	20.04	-16.99	16.21	4.70	24.10	-14.76	25.32
MSCI All Country Europe & Middle East Net	3.76	3.98	12.04	19.31	3.84	8.73	6.74	4.73	17.71	19.24	-16.65	16.77	4.64	23.44	-14.50	24.83
MSCI Emerging Markets Net	1.61	5.94	9.55	15.07	-3.06	4.79	3.20	2.56	17.39	9.83	-20.09	-2.54	18.31	18.44	-14.58	37.28
MSCI Emerging Mrkts. Asia Net	1.63	6.38	12.54	16.98	-3.16	5.99	3.65	4.21	19.36	7.76	-21.11	-5.08	28.38	19.24	-15.45	42.83
MSCI Emerging Mrkts. Eastern Europe Net	2.07	1.01	8.29	27.04	-35.23	-19.19	-14.49	-8.52	50.20	47.20	-82.22	17.74	-11.97	34.51	-4.36	17.21
MSCI Emerg. Mrkts. Europe & Middle East Net	0.07	5.53	5.74	9.77	-9.08	-0.89	0.65	-1.31	17.48	10.63	-35.34	23.93	-7.60	19.33	-8.07	15.86
MSCI Emerging Mrkts. Far East Net	1.82	4.55	9.60	11.34	-6.22	3.67	1.75	3.04	22.52	4.74	-23.53	-9.27	30.04	20.92	-16.51	43.53
MSCI Emerging Mrkts. Latin America Net	2.57	-2.65	-12.62	0.35	3.29	2.56	3.58	-0.82	25.09	32.71	8.92	-8.09	-13.80	17.46	-6.57	23.74
MSCI Frontier Markets Net	1.99	3.87	10.05	10.08	-2.67	2.81	3.65	1.02	13.46	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	1.24	1.85	23.11	32.13	2.50	13.66	12.99	9.33	22.46	55.80	-39.89	21.57	23.61	32.69	-12.53	-1.25
S&P 500 Consumer Discretionary	-0.97	5.59	6.37	12.43	1.60	10.76	9.35	11.97	25.46	42.41	-37.03	24.43	33.30	27.94	0.83	22.98
S&P 500 Consumer Staples	5.94	7.79	17.68	18.58	8.49	10.21	11.17	9.62	14.12	0.52	-0.62	18.63	10.75	27.61	-8.38	13.49
S&P 500 Energy	-1.70	-0.92	11.35	6.35	29.10	15.37	8.51	3.45	28.16	-1.33	65.72	54.64	-33.68	11.81	-18.10	-1.01
S&P 500 Financials	4.51	10.28	22.58	35.39	8.07	13.55	10.62	11.47	20.20	12.15	-10.53	35.04	-1.69	32.13	-13.03	22.18
S&P 500 Health Care	5.10	9.95	16.31	20.11	6.91	13.72	11.20	11.37	14.95	2.06	-1.95	26.13	13.45	20.82	6.47	22.08
S&P 500 Industrials	2.86	6.89	16.26	23.60	9.80	13.68	11.38	11.24	20.03	18.13	-5.48	21.12	11.06	29.37	-13.29	21.03
S&P 500 Information Technology	1.25	8.38	27.14	38.73	16.58	26.50	22.95	22.02	24.40	57.84	-28.19	34.53	43.89	50.29	-0.29	38.83
S&P 500 Materials	2.40	3.65	11.21	16.15	5.49	13.11	10.34	8.66	21.93	12.55	-12.27	27.28	20.73	24.58	-14.70	23.84
S&P 500 Utilities	4.86	5.81	22.55	25.55	7.01	7.51	9.68	9.50	18.36	-7.08	1.57	17.67	0.48	26.35	4.11	12.11
DJ US Real Estate	5.50	15.69	10.15	20.50	0.01	4.57	6.25	6.76	22.25	12.25	-25.17	38.99	-5.29	28.92	-4.03	9.84
DJ Global World Real Estate	5.20	12.29	8.02	17.35	-2.86	1.44	2.79	3.74	19.76	9.34	-24.33	21.35	-6.19	25.33	-6.69	16.94

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Commodity Indexes																
Bloomberg Commodity	0.05	-5.47	0.95	-4.39	3.70	7.02	4.75	-1.08	15.33	-7.91	16.09	27.11	-3.12	7.69	-11.25	1.70
Bloomberg Sub Energy	-4.29	-8.01	-4.56	-18.45	1.21	-1.02	-4.17	-9.78	32.91	-21.64	36.22	52.13	-42.72	11.78	-12.70	-4.31
Bloomberg Sub Gold	2.64	7.04	20.42	27.86	10.65	9.25	11.89	5.95	12.75	12.82	-0.74	-4.28	20.95	18.03	-2.81	12.79
Bloomberg Sub Grains	-0.33	-16.94	-19.14	-22.63	-4.07	5.48	2.48	-2.59	17.74	-13.01	18.00	20.95	19.32	-1.12	-5.50	-11.31
Bloomberg Sub Industrial Metals	3.40	-8.76	5.05	6.87	-0.34	7.21	5.89	1.91	22.56	-9.15	-2.40	30.34	16.33	6.98	-19.48	29.35
Bloomberg Sub Livestock	0.36	3.63	12.58	2.70	5.83	1.22	0.13	-2.92	12.07	-1.92	7.44	8.62	-23.42	-5.99	-1.71	6.36
Bloomberg Sub Petroleum	-4.36	-1.92	8.17	-1.40	20.96	11.94	5.93	-2.95	27.96	-0.09	45.58	62.89	-40.30	33.76	-19.22	9.58
Bloomberg Sub Precious Metals	1.93	3.81	20.40	25.38	9.64	9.10	11.70	5.22	14.85	9.64	0.12	-6.11	25.60	17.02	-4.57	10.94
Bloomberg Sub Silver	-0.29	-5.39	19.95	16.81	6.02	8.37	10.93	2.80	26.58	-0.26	2.58	-12.26	42.47	13.87	-10.19	5.79
Bloomberg Sub Softs	5.54	7.30	14.64	14.66	12.12	18.21	12.25	1.21	17.73	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)	-8.31	16.10	20.48	10.54	-3.09	-4.60	2.60	2.27	89.61	-42.55	25.84	-24.31	82.44	-50.94	130.25	-21.37
S&P 500 VIX Short-Term Futures	?	?	?	?	939.27	205.81	151.92	32.59	47.57	-72.22	-23.06	-72.20	13.23	-67.80	68.11	-72.11
S&P 500 VIX Mid-Term Futures	0.24	3.90	-12.76	-22.81	-20.48	-7.87	-4.67	-12.02	23.17	-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	1.68	5.15	5.74	10.62	-0.25	2.74	3.67	3.38	8.96	9.03	-13.91	2.87	10.11	12.40	-1.58	7.13
40% MSCI World - 60% BC US Aggregate Bond	1.92	5.51	8.45	14.00	1.59	5.47	5.65	5.04	10.75	12.61	-14.87	7.41	12.30	16.14	-3.25	10.81
60% MSCI World - 40% BC US Aggregate Bond	2.16	5.86	11.18	17.43	3.39	8.11	7.51	6.64	12.79	16.26	-15.90	12.08	14.02	19.93	-4.99	14.58
80% MSCI World - 20% BC US Aggregate Bond	2.40	6.22	13.94	20.90	5.16	10.66	9.25	8.15	14.97	19.99	-16.99	16.88	15.24	23.77	-6.81	18.44
20% S&P 500 - 80% BC US Aggregate Bond	1.63	5.32	6.28	11.13	0.23	3.26	4.20	4.02	8.96	9.50	-13.92	4.08	10.51	13.09	-0.63	7.03
40% S&P 500 - 60% BC US Aggregate Bond	1.83	5.84	9.54	15.04	2.56	6.52	6.72	6.35	10.85	13.56	-14.89	9.91	13.14	17.55	-1.39	10.61
60% S&P 500 - 40% BC US Aggregate Bond	2.06	6.43	12.94	19.21	5.00	9.69	9.02	8.57	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	2.23	6.88	16.16	23.04	7.13	12.86	11.45	10.84	15.38	21.95	-16.98	22.22	17.13	26.75	-3.26	18.00

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CCM-647

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