



Benchmark Review

September 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	1.96	8.72	13.93	28.85	9.97	11.78	10.48	12.03	16.89	16.18	-6.86	20.95	9.72	25.34	-3.48	28.11
NASDAQ Composite Index	2.76	2.76	21.84	38.64	8.84	18.81	15.55	16.13	22.04	44.64	-32.54	22.18	44.92	36.69	-2.84	29.64
Russell 1000	2.14	6.08	21.18	35.68	10.83	15.64	13.59	13.10	17.97	26.53	-19.13	26.45	20.96	31.43	-4.78	21.69
Russell 1000 Growth	2.83	3.19	24.55	42.19	12.02	19.74	16.91	16.52	21.18	42.68	-29.14	27.60	38.49	36.39	-1.51	30.21
Russell 1000 Value	1.39	9.43	16.68	27.76	9.03	10.69	9.55	9.23	16.83	11.46	-7.54	25.16	2.80	26.54	-8.27	13.66
Russell 2000	0.70	9.27	11.17	26.76	1.84	9.39	6.10	8.78	22.59	16.93	-20.44	14.82	19.96	25.52	-11.01	14.65
Russell 2000 Growth	1.33	8.41	13.22	27.66	-0.35	8.82	5.50	8.95	23.19	18.66	-26.36	2.83	34.63	28.48	-9.31	22.17
Russell 2000 Value	0.06	10.15	9.22	25.88	3.77	9.29	6.15	8.22	22.88	14.65	-14.48	28.27	4.63	22.39	-12.86	7.84
Russell 2500	1.49	8.75	11.30	26.17	3.47	10.43	7.87	9.50	21.27	17.42	-18.37	18.18	19.99	27.77	-10.00	16.81
Russell 3000	2.07	6.23	20.63	35.19	10.29	15.26	13.11	12.83	18.06	25.96	-19.21	25.66	20.89	31.02	-5.24	21.13
Russell Micro Cap	-0.47	8.29	7.38	24.63	-3.74	8.45	3.94	7.29	23.62	9.33	-21.96	19.34	20.96	22.43	-13.08	13.17
S&P 500	2.14	5.89	22.08	36.35	11.91	15.98	13.94	13.38	17.82	26.29	-18.11	28.71	18.40	31.49	-4.38	21.83
S&P 500 Equal Weighted	2.34	9.60	15.16	28.83	8.18	12.82	11.19	11.13	18.50	13.87	-11.45	29.63	12.83	29.24	-7.64	18.90
S&P MidCap 400	1.16	6.94	13.54	26.79	7.47	11.78	9.26	10.32	20.66	16.44	-13.06	24.76	13.66	26.20	-11.08	16.24
S&P MidCap 400 Growth	1.14	4.63	16.87	28.49	6.32	11.63	9.14	10.58	21.00	17.49	-18.96	18.90	22.77	26.29	-10.34	19.92
S&P MidCap 400 Value	1.17	9.52	10.01	24.99	8.45	11.45	9.01	9.69	21.34	15.39	-6.93	30.65	3.73	26.08	-11.88	12.32
S&P Preferred Stock	3.26	6.94	12.17	18.89	1.01	3.70	4.50	4.70	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	1.34	5.20	4.45	11.57	-1.39	0.33	1.93	1.84	7.60	5.53	-13.01	-1.54	7.51	8.72	0.01	3.54
Bloomberg Global Agg. Bond	1.70	6.98	3.60	11.99	-3.06	-0.83	0.53	0.57	9.08	5.72	-16.25	-4.71	9.20	6.84	-1.20	7.39
Bloomberg U.S. Govt/Credit	1.40	5.10	4.39	11.31	-1.50	0.41	2.15	2.00	7.44	5.72	-13.58	-1.75	8.93	9.71	-0.42	4.00
Bloomberg Intermediate U.S. Corporate	1.30	4.66	5.71	11.90	0.72	2.02	3.24	2.85	6.07	7.29	-9.40	-1.00	7.47	10.14	-0.23	3.92
Bloomberg U.S. Govt/Credit Interm.	1.08	4.17	4.68	9.45	0.17	1.26	2.38	1.96	4.94	5.24	-8.23	-1.44	6.43	6.80	0.88	2.14
Bloomberg U.S. Credit	1.71	5.71	5.23	13.81	-1.12	1.07	2.91	2.79	9.07	8.18	-15.26	-1.08	9.35	13.80	-2.11	6.18
Bloomberg U.S. Treasury	1.20	4.74	3.84	9.72	-1.78	-0.20	1.50	1.34	6.53	4.05	-12.46	-2.32	8.00	6.86	0.86	2.31
Bloomberg U.S. 3 Year Treasury	0.91	3.60	4.17	7.55	0.29	1.09	1.88	1.33	3.62	4.18	-6.26	-1.16	4.63	4.35	1.26	0.52
Bloomberg U.S. 5 Year Treasury	1.01	4.43	3.99	8.68	-1.12	0.28	1.70	1.24	5.67	3.93	-9.74	-2.80	7.26	5.82	1.42	0.67
Bloomberg U.S. 10 Year Treasury	1.43	5.80	3.65	10.77	-3.41	-1.28	1.28	1.03	9.23	3.21	-16.33	-3.60	10.61	8.90	-0.00	2.14
Bloomberg U.S. 30 Year Treasury	1.93	8.12	1.42	14.46	-10.29	-5.77	-0.91	0.37	16.86	1.93	-33.29	-4.62	18.72	16.43	-2.72	9.14
Bloomberg U.S. Corporate Bond	1.77	5.84	5.32	14.28	-1.18	1.16	3.04	2.93	9.45	8.52	-15.76	-1.04	9.89	14.54	-2.51	6.42
Bloomberg U.S. Corporate High Yield	1.62	5.28	8.00	15.74	3.10	4.72	4.99	5.04	8.49	13.44	-11.19	5.28	7.11	14.32	-2.08	7.50
Bloomberg U.S. Treasury TIPS	1.50	4.12	4.85	9.79	-0.57	2.62	3.36	2.54	7.13	3.90	-11.85	5.96	10.99	8.43	-1.26	3.01
Bloomberg Municipal	0.99	2.71	2.30	10.37	0.09	1.39	2.55	2.52	7.50	6.40	-8.53	1.52	5.21	7.54	1.28	5.45
Bloomberg Municipal 5 Year	0.70	3.04	2.23	7.56	0.35	1.33	2.09	1.79	5.15	4.31	-5.26	0.34	4.29	5.45	1.69	3.14
Bloomberg Global Agg. Ex US	2.00	8.52	2.81	12.28	-4.42	-1.86	-0.69	-0.50	10.62	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	0.92	7.26	12.99	24.77	5.48	8.20	6.55	5.71	17.06	18.24	-14.45	11.26	7.82	22.01	-13.79	25.03
MSCI World Net	1.83	6.36	18.86	32.43	9.08	13.04	11.09	10.07	17.24	23.79	-18.14	21.82	15.90	27.67	-8.71	22.40
MSCI World Ex US Net	1.11	7.76	13.10	24.98	5.65	8.36	6.75	5.68	17.06	17.94	-14.29	12.62	7.59	22.49	-14.09	24.21
MSCI EAFE Small Cap Net	2.55	10.54	11.11	23.48	-0.36	6.40	4.23	6.21	18.71	13.16	-21.39	10.10	12.34	24.96	-17.89	33.01
MSCI All Country World Index Net	2.32	6.61	18.66	31.76	8.09	12.19	10.31	9.39	16.78	22.20	-18.36	18.54	16.25	26.60	-9.41	23.97
MSCI All Country World Index Ex USA Net	2.69	8.06	14.21	25.35	4.14	7.59	6.06	5.22	16.41	15.62	-16.00	7.82	10.65	21.51	-14.20	27.19
MSCI All Country Americas Net	2.11	6.04	20.49	34.79	10.41	14.90	12.92	12.01	17.89	26.06	-19.20	25.85	19.16	30.37	-5.75	20.96
MSCI All Country Asia Net	5.09	8.73	17.95	26.30	1.39	6.71	4.84	5.80	16.64	11.07	-18.61	-2.49	20.92	18.83	-13.73	33.41
MSCI All Country Europe Net	0.37	6.42	12.77	25.26	5.71	8.31	6.81	5.28	18.44	20.04	-16.99	16.21	4.70	24.10	-14.76	25.32
MSCI All Country Europe & Middle East Net	0.42	6.51	12.51	24.64	5.50	8.25	6.72	5.18	17.81	19.24	-16.65	16.77	4.64	23.44	-14.50	24.83
MSCI Emerging Markets Net	6.68	8.72	16.86	26.05	0.40	5.75	4.41	4.02	17.35	9.83	-20.09	-2.54	18.31	18.44	-14.58	37.28
MSCI Emerging Mrkts. Asia Net	8.01	9.47	21.55	29.71	0.77	7.22	5.28	5.64	19.32	7.76	-21.11	-5.08	28.38	19.24	-15.45	42.83
MSCI Emerging Mrkts. Eastern Europe Net	-1.02	-1.20	7.19	38.42	-36.26	-19.75	-15.49	-8.28	50.12	47.20	-82.22	17.74	-11.97	34.51	-4.36	17.21
MSCI Emerg. Mrkts. Europe & Middle East Net	0.97	4.21	6.77	14.15	-9.52	-1.04	-0.02	-0.73	17.22	10.63	-35.34	23.93	-7.60	19.33	-8.07	15.86
MSCI Emerging Mrkts. Far East Net	10.04	10.24	20.61	27.10	-1.52	5.29	3.50	4.71	22.54	4.74	-23.53	-9.27	30.04	20.92	-16.51	43.53
MSCI Emerging Mrkts. Latin America Net	0.11	3.75	-12.52	2.83	7.16	2.05	2.81	0.62	25.12	32.71	8.92	-8.09	-13.80	17.46	-6.57	23.74
MSCI Frontier Markets Net	0.59	4.50	10.70	15.09	-2.86	3.34	3.76	1.01	13.43	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	4.63	1.68	28.81	42.91	6.45	14.59	13.06	9.78	22.46	55.80	-39.89	21.57	23.61	32.69	-12.53	-1.25
S&P 500 Consumer Discretionary	7.09	7.80	13.91	28.06	4.85	12.10	10.41	13.06	25.46	42.41	-37.03	24.43	33.30	27.94	0.83	22.98
S&P 500 Consumer Staples	0.90	8.96	18.74	25.32	10.36	10.04	11.14	9.65	14.12	0.52	-0.62	18.63	10.75	27.61	-8.38	13.49
S&P 500 Energy	-2.68	-2.32	8.36	0.85	24.14	13.90	7.56	3.99	28.16	-1.33	65.72	54.64	-33.68	11.81	-18.10	-1.01
S&P 500 Financials	-0.54	10.66	21.91	39.01	8.55	12.40	10.94	11.45	20.20	12.15	-10.53	35.04	-1.69	32.13	-13.03	22.18
S&P 500 Health Care	-1.68	6.07	14.35	21.69	8.35	13.37	10.35	11.14	14.95	2.06	-1.95	26.13	13.45	20.82	6.47	22.08
S&P 500 Industrials	3.39	11.55	20.20	35.89	13.40	13.76	11.60	11.73	20.03	18.13	-5.48	21.12	11.06	29.37	-13.29	21.03
S&P 500 Information Technology	2.49	1.61	30.31	52.68	19.89	26.74	23.52	22.40	24.40	57.84	-28.19	34.53	43.89	50.29	-0.29	38.83
S&P 500 Materials	2.64	9.70	14.14	25.20	9.09	13.00	11.21	9.12	21.93	12.55	-12.27	27.28	20.73	24.58	-14.70	23.84
S&P 500 Utilities	6.60	19.37	30.63	41.82	11.66	7.99	10.96	10.41	18.36	-7.08	1.57	17.67	0.48	26.35	4.11	12.11
DJ US Real Estate	3.24	17.08	13.72	34.17	3.05	4.85	7.28	7.74	22.25	12.25	-25.17	38.99	-5.29	28.92	-4.03	9.84
DJ Global World Real Estate	4.27	17.07	12.63	30.14	0.25	1.92	3.93	4.85	19.76	9.34	-24.33	21.35	-6.19	25.33	-6.69	16.94

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Commodity Indexes																
Bloomberg Commodity	4.86	0.68	5.86	0.96	3.66	7.79	5.25	0.03	15.32	-7.91	16.09	27.11	-3.12	7.69	-11.25	1.70
Bloomberg Sub Energy	0.48	-11.19	-4.10	-21.50	-3.80	-1.15	-4.90	-9.33	33.02	-21.64	36.22	52.13	-42.72	11.78	-12.70	-4.31
Bloomberg Sub Gold	5.65	12.93	27.22	41.70	13.99	11.26	13.05	7.19	12.79	12.82	-0.74	-4.28	20.95	18.03	-2.81	12.79
Bloomberg Sub Grains	5.96	-1.23	-14.31	-13.52	-2.08	5.62	3.99	-0.71	17.72	-13.01	18.00	20.95	19.32	-1.12	-5.50	-11.31
Bloomberg Sub Industrial Metals	6.83	2.97	12.22	12.39	2.62	8.52	6.68	3.29	22.64	-9.15	-2.40	30.34	16.33	6.98	-19.48	29.35
Bloomberg Sub Livestock	1.93	4.70	14.75	4.39	7.19	0.15	-0.81	-3.27	12.06	-1.92	7.44	8.62	-23.42	-5.99	-1.71	6.36
Bloomberg Sub Petroleum	-5.60	-12.54	2.11	-13.60	14.95	10.36	3.88	-2.88	27.94	-0.09	45.58	62.89	-40.30	33.76	-19.22	9.58
Bloomberg Sub Precious Metals	6.31	11.28	28.00	41.35	13.59	11.44	12.90	6.70	14.81	9.64	0.12	-6.11	25.60	17.02	-4.57	10.94
Bloomberg Sub Silver	8.39	6.31	30.02	39.33	12.04	11.78	12.20	5.02	26.28	-0.26	2.58	-12.26	42.47	13.87	-10.19	5.79
Bloomberg Sub Softs	11.30	14.80	27.60	27.17	15.55	19.77	14.66	2.98	17.47	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)	11.53	34.49	34.38	-4.51	-10.25	0.60	5.52	0.25	89.61	-42.55	25.84	-24.31	82.44	-50.94	130.25	-21.37
S&P 500 VIX Short-Term Futures	11.45	13.72	-19.73	-46.38	-51.41	-48.94	-44.02	-47.17	47.16	-72.22	-23.06	-72.20	13.23	-67.80	68.11	-72.11
S&P 500 VIX Mid-Term Futures	4.54	5.84	-8.81	-20.98	-20.77	-6.92	-3.50	-12.18	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	1.44	5.43	7.27	15.56	0.75	3.04	3.99	3.64	8.95	9.03	-13.91	2.87	10.11	12.40	-1.58	7.13
40% MSCI World - 60% BC US Aggregate Bond	1.54	5.66	10.11	19.65	2.87	5.68	5.94	5.36	10.68	12.61	-14.87	7.41	12.30	16.14	-3.25	10.81
60% MSCI World - 40% BC US Aggregate Bond	1.64	5.90	13.00	23.82	4.96	8.24	7.79	7.01	12.66	16.26	-15.90	12.08	14.02	19.93	-4.99	14.58
80% MSCI World - 20% BC US Aggregate Bond	1.73	6.13	15.91	28.08	7.04	10.70	9.51	8.59	14.79	19.99	-16.99	16.88	15.24	23.77	-6.81	18.44
20% S&P 500 - 80% BC US Aggregate Bond	1.50	5.33	7.88	16.28	1.29	3.58	4.52	4.26	8.94	9.50	-13.92	4.08	10.51	13.09	-0.63	7.03
40% S&P 500 - 60% BC US Aggregate Bond	1.66	5.47	11.35	21.12	3.97	6.78	7.03	6.63	10.76	13.56	-14.89	9.91	13.14	17.55	-1.39	10.61
60% S&P 500 - 40% BC US Aggregate Bond	1.84	5.63	15.03	26.41	6.83	9.88	9.33	8.89	12.87	17.98	-16.07	16.61	14.04	22.38	-2.63	14.52
80% S&P 500 - 20% BC US Aggregate Bond	1.98	5.75	18.45	31.15	9.28	12.99	11.75	11.20	15.15	21.95	-16.98	22.22	17.13	26.75	-3.26	18.00

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CCM-647

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