

MARKET STATISTICS
INDEX RETURNS
EQUITIES (%)

	WTD	MTD	YTD
S&P 500	-0.44	-0.77	0.66
DJIA	-1.31	0.30	2.11
Nasdaq	-0.95	-3.34	-2.40
Russell 1000	-0.42	-0.55	0.81
Russell 2000	-1.18	0.79	6.22
Russell 3000	-0.45	-0.49	1.05

FOREIGN (%)

	WTD	MTD	YTD
MSCI ACWI	0.60	1.55	4.59
MSCI ACWI xUSA	1.60	4.93	11.23
MSCI EAFE	0.72	4.13	9.58
MSCI EM	3.32	6.07	15.46

FIXED INCOME (%)

	WTD	MTD	YTD
US Intermediate Gov/Cred	0.24	0.94	1.02
U.S. Aggregate	0.31	1.41	1.52
US Corp High Yield	-0.09	0.32	0.83
Municipal Bond	0.22	1.13	2.08

OTHERS (%)

	WTD	MTD	YTD
DJ Eqty REIT TOT RE IDX	1.07	7.56	10.57
Alerian MLP Index	0.62	7.09	15.68
S&P GSCI Index Spot Indx	0.15	0.84	9.97
Dollar Index Spot	-0.16	0.67	-0.69

RUSSELL STYLE
RETURNS YTD (%)

	VALUE	CORE	GROWTH
Large Cap	7.23	0.81	-4.82
Mid Cap	9.19	6.98	-0.07
Small Cap	8.99	6.22	3.71

ECONOMIC SCORECARD
SELECTED RELEASES

	ESTIMATE	ACTUAL	DIFFERENCE
PPI Final Demand MoM	0.3%	0.5%	0.2%
PPI Ex Food and Energy MoM	0.3%	0.8%	0.5%
Durable Goods Orders	-1.4%	-1.4%	0.0%
Conf. Board Consumer Confidence	87.1	91.2	4.1
Initial Jobless Claims	216k	212k	-4k
Continuing Claims	1858k	1833k	-25k

COMMODITY PRICES
ALTERNATIVES

	2/27/2026	1/31/2026	12/31/2025
Generic Crude Oil Future	\$67.31	\$65.21	\$57.42
Generic Gold Future	\$5,281.00	\$4,713.90	\$4,341.10
Dollar Index Spot	\$97.64	\$96.99	\$98.32
Euro Spot	\$1.18	\$1.19	\$1.17

S&P 500
SECTOR RETURNS (%)

	YTD
Discretionary	-3.76
Staples	16.25
Energy	25.22
Financials	-6.13
Health Care	3.52
Industrials	14.22
Info Tech	-5.51
Materials	17.79
Real Estate	9.36
Communication Services	0.36
Utilities	11.71