

MARKET STATISTICS
INDEX RETURNS
EQUITIES (%)

	WTD	MTD	YTD
S&P 500	-1.60	-3.53	-2.89
DJIA	-1.99	-4.78	-2.76
Nasdaq	-1.26	-2.44	-4.78
Russell 1000	-1.69	-3.69	-2.90
Russell 2000	-1.79	-5.73	0.15
Russell 3000	-1.69	-3.78	-2.77

FOREIGN (%)

	WTD	MTD	YTD
MSCI ACWI	-0.95	-4.53	-0.39
MSCI ACWI xUSA	-0.84	-7.14	3.39
MSCI EAFE	-1.05	-7.55	1.81
MSCI EM	-0.51	-7.29	6.48

FIXED INCOME (%)

	WTD	MTD	YTD
US Intermediate Gov/Cred	-0.54	-1.18	0.01
U.S. Aggregate	-0.79	-1.74	-0.03
US Corp High Yield	-0.39	-0.82	-0.13
Municipal Bond	-0.69	-1.46	0.71

OTHERS (%)

	WTD	MTD	YTD
DJ Eqty REIT TOT RE IDX	-1.35	-3.40	6.81
Alerian MLP Index	-0.95	0.40	16.14
S&P GSCI Index Spot Indx	2.49	17.54	30.91
Dollar Index Spot	1.51	2.94	2.19

RUSSELL STYLE
RETURNS YTD (%)

	VALUE	CORE	GROWTH
Large Cap	2.10	-2.90	-7.34
Mid Cap	2.71	0.81	-5.26
Small Cap	3.02	0.15	-2.46

ECONOMIC SCORECARD
SELECTED RELEASES

	ESTIMATE	ACTUAL	DIFFERENCE
CPI YoY	2.4%	2.4%	0.0%
Core CPI YoY	2.5%	2.5%	0.0%
Core PCE Price Index YoY	3.1%	3.1%	0.0%
GDP Annualized QoQ	1.4%	0.7%	-0.7%
Initial Jobless Claims	215k	213k	-2k
Continuing Claims	1849k	1850k	1k

COMMODITY PRICES
ALTERNATIVES

	3/13/2026	2/28/2026	12/31/2025
Generic Crude Oil Future	\$98.67	\$67.02	\$57.42
Generic Gold Future	\$5,020.70	\$5,247.90	\$4,341.10
Dollar Index Spot	\$100.48	\$97.61	\$98.32
Euro Spot	\$1.14	\$1.18	\$1.17

S&P 500
SECTOR RETURNS (%)

	YTD
Discretionary	-7.90
Staples	10.40
Energy	29.16
Financials	-10.87
Health Care	-3.22
Industrials	6.15
Info Tech	-6.62
Materials	7.87
Real Estate	5.40
Communication Services	-2.88
Utilities	10.01