

MARKET STATISTICS
INDEX RETURNS
EQUITIES (%)

	WTD	MTD	YTD
S&P 500	2.33	2.65	8.48
DJIA	0.22	-0.09	3.72
Nasdaq	4.51	5.45	13.14
Russell 1000	2.17	2.46	8.08
Russell 2000	1.72	2.20	15.81
Russell 3000	2.15	2.44	8.42

FOREIGN (%)

	WTD	MTD	YTD
MSCI ACWI	2.16	2.50	9.47
MSCI ACWI xUSA	3.40	3.76	13.21
MSCI EAFE	1.70	2.24	8.79
MSCI EM	7.65	7.77	23.52

FIXED INCOME (%)

	WTD	MTD	YTD
US Intermediate Gov/Cred	0.02	0.05	0.23
U.S. Aggregate	0.05	0.16	0.23
US Corp High Yield	0.02	0.16	1.35
Municipal Bond	0.17	0.19	1.16

OTHERS (%)

	WTD	MTD	YTD
DJ Eqty REIT TOT RE IDX	0.57	0.36	13.58
Alerian MLP Index	-1.48	-2.32	19.22
S&P GSCI Index Spot Indx	-4.29	-5.30	32.67
Dollar Index Spot	-0.30	-0.20	-0.47

RUSSELL STYLE
RETURNS YTD (%)

	VALUE	CORE	GROWTH
Large Cap	11.66	8.08	4.62
Mid Cap	12.46	9.61	0.45
Small Cap	17.35	15.81	14.39

ECONOMIC SCORECARD
SELECTED RELEASES

	ESTIMATE	ACTUAL	DIFFERENCE
Change in Nonfarm Payrolls	65k	115k	50k
Average Hourly Earnings YoY	3.8%	3.6%	-0.2%
Unemployment Rate	4.3%	4.3%	0.0%
Labor Force Participation Rate	61.9%	61.8%	-0.1%
ISM Services Index	53.7	53.6	-0.1
Factory Orders	0.6%	1.5%	0.9%

COMMODITY PRICES
ALTERNATIVES

	5/8/2026	4/30/2026	12/31/2025
Generic Crude Oil Future	\$94.85	\$105.07	\$57.42
Generic Gold Future	\$4,725.70	\$4,629.60	\$4,341.10
Dollar Index Spot	\$97.86	\$98.06	\$98.32
Euro Spot	\$1.18	\$1.17	\$1.17

S&P 500
SECTOR RETURNS (%)

	YTD
Discretionary	3.77
Staples	10.68
Energy	24.73
Financials	-6.05
Health Care	-6.89
Industrials	12.05
Info Tech	15.84
Materials	12.95
Real Estate	11.56
Communication Services	12.35
Utilities	5.47