

Q1 2026 Performance Reference Sheet as of 3/31/2026

Equity Indices					
	YTD	1Yr	3Yr	5Yr	10Yr
Total US Stock Market	-4.11%	16.36%	16.13%	9.95%	11.93%
S&P 500	-4.63%	16.33%	16.69%	10.44%	12.23%
Dow Jones	-3.58%	10.33%	11.67%	7.04%	10.11%
NASDAQ	-7.11%	24.81%	20.89%	10.26%	16.06%
MSCI EAFE	-1.87%	18.23%	10.70%	5.15%	5.56%
MSCI EM	-0.51%	26.86%	12.16%	1.20%	5.26%

Style Box 1Yr			
	Value	Blend	Growth
Large-Cap	10.72%	16.33%	21.90%
Mid-Cap	10.49%	15.66%	20.82%
Small-Cap	20.83%	18.49%	16.29%

Style Box 5Yr			
	Value	Blend	Growth
Large-Cap	8.35%	10.44%	11.64%
Mid-Cap	5.36%	5.29%	5.09%
Small-Cap	3.04%	2.78%	2.45%

Target Federal Funds Rate Range: 3.50% - 3.75%

U.S. Equity Sectors					
	YTD	1Yr	3Yr	5Yr	10Yr
S&P 500 Energy (Sector)	37.24%	31.79%	14.11%	20.59%	7.39%
S&P 500 Materials (Sector)	9.30%	15.84%	7.32%	4.88%	N/A
S&P 500 Industrials (Sector)	4.30%	23.42%	16.94%	10.48%	10.97%
S&P 500 Consumer Discretionary (Sector)	-9.34%	10.97%	14.52%	5.45%	10.77%
S&P 500 Consumer Staples (Sector)	7.01%	3.68%	5.85%	5.76%	5.47%
S&P 500 Health Care (Sector)	-5.29%	0.48%	4.22%	4.69%	8.12%
S&P 500 Financials (Sector)	-9.80%	-0.87%	15.38%	7.76%	10.47%
S&P 500 Information Technology (Sector)	-9.25%	28.31%	25.03%	17.22%	21.48%
S&P 500 Communication Services (Sector)	-7.10%	31.44%	29.95%	11.92%	9.31%
S&P 500 Utilities (Sector)	7.52%	16.37%	10.68%	7.48%	6.35%
S&P 500 Real Estate (Sector)	1.94%	-1.11%	3.46%	1.03%	2.80%

Allocation ETFs					
	YTD	1Yr	3Yr	5Yr	10Yr
iShares Aggressive Allocation (80/20) ETF	-1.19%	15.67%	11.64%	5.74%	6.92%
iShares Growth Allocation (60/40) ETF	-1.02%	11.78%	8.75%	3.74%	5.01%
iShares Moderate Allocation (40/60) ETF	-0.75%	7.95%	5.92%	1.70%	3.13%
iShares Conservative Allocation (30/70) ETF	-0.60%	6.01%	4.50%	0.63%	2.14%

U.S. Equity Factors					
	YTD	1Yr	3Yr	5Yr	10Yr
S&P 500 Momentum Index	-6.00%	21.23%	27.06%	16.12%	N/A
S&P 500 Pure Value	3.93%	16.29%	12.25%	7.78%	7.80%
S&P 500 Quality	0.20%	13.41%	16.66%	11.17%	N/A
S&P 500 Dividend Aristocrats	1.78%	3.78%	5.15%	4.20%	7.31%

Commodities & Other					
	YTD	1Yr	3Yr	5Yr	10Yr
S&P GSCI (Broad Commodities)	35.85%	31.17%	9.09%	9.78%	8.71%
S&P GSCI Gold	7.77%	48.51%	33.05%	22.22%	14.24%
S&P GSCI Silver	6.11%	116.46%	45.83%	25.02%	17.09%
S&P GSCI Crude Oil	70.86%	39.05%	9.18%	10.63%	9.93%
Grayscale Bitcoin Trust ETF	-22.82%	-19.04%	53.49%	3.41%	N/A

Fixed Income					
	YTD	1Yr	3Yr	5Yr	10Yr
Aggregate Bond TR	-0.05%	4.35%	3.63%	0.31%	1.70%
High Yield TR	-0.50%	7.01%	8.60%	4.23%	6.12%
Short-Duration Bond TR	0.18%	3.34%	2.51%	1.08%	1.41%

Source: YCharts 3/31/2026. Indices/ETFs Included: S&P 1500, S&P 500, Dow Jones Industrial Average, Nasdaq Composite, MSCI EAFE, MSCI Emerging Markets, S&P 500 Energy (Sector), S&P 500 Materials (Sector), S&P 500 Industrials (Sector), S&P 500 Consumer Discretionary (Sector), S&P 500 Consumer Staples (Sector), S&P 500 Health Care (Sector), S&P 500 Financials (Sector), S&P 500 Information Technology (Sector), S&P 500 Communication Services (Sector), S&P 500 Utilities (Sector), S&P 500 Real Estate (Sector), iShares Core 80/20 Aggressive Allocation ETF, iShares Core 60/40 Balanced Allocation ETF, iShares Core 40/60 Moderate Allocation ETF, iShares Core 30/70 Conservative Allocation ETF, Bloomberg US Aggregate, Bloomberg US Corporate High Yield, Bloomberg Managed Money Short, S&P 500 Value, S&P 500, S&P 500 Growth, S&P 400 Value, S&P 400, S&P 400 Growth, S&P 600 Value, S&P 600, S&P 600 Growth, S&P 500 Momentum Index, S&P 500 Pure Value, S&P 500 Quality, S&P 500 Dividend Aristocrats, S&P GSCI, S&P GSCI Gold, S&P GSCI Silver, S&P GSCI Brent Crude, Grayscale Bitcoin Trust ETF