

January 9, 2026
MARKET STATISTICS
INDEX RETURNS
EQUITIES (%)

	WTD	MTD	YTD
S&P 500	1.57	1.78	1.78
DJIA	2.32	3.03	3.03
Nasdaq	1.88	1.85	1.85
Russell 1000	1.64	1.92	1.92
Russell 2000	4.62	5.79	5.79
Russell 3000	1.77	2.09	2.09

FOREIGN (%)

	WTD	MTD	YTD
MSCI ACWI	0.96	1.48	148
MSCI ACWI xUSA	1.05	2.04	2.04
MSCI EAFE	0.86	1.47	1.47
MSCI EM	1.62	3.47	3.47

FIXED INCOME (%)

	WTD	MTD	YTD
US Intermediate Gov/Cred	0.06	-0.03	-0.03
U.S. Aggregate	0.13	-0.07	-0.07
US Corp High Yield	0.30	0.30	0.30
Municipal Bond	0.64	0.69	0.69

OTHERS (%)

	WTD	MTD	YTD
DJ Eqty REIT TOT RE IDX	0.93	1.11	1.11
Alerian MLP Index	1.32	2.29	2.29
S&P GSCI Index Spot Indx	1.35	1.25	1.25
Dollar Index Spot	0.72	0.83	0.83

RUSSELL STYLE
RETURNS YTD (%)

	VALUE	CORE	GROWTH
Large Cap	3.44	1.92	0.63
Mid Cap	4.10	3.84	3.02
Small Cap	5.51	5.79	6.04

ECONOMIC SCORECARD
SELECTED RELEASES

	ESTIMATE	ACTUAL	DIFFERENCE
Change in Nonfarm Payrolls	70k	50k	-20k
Unemployment Rate	4.5%	4.4%	-0.1%
Average Hourly Earnings YoY	3.6%	3.8%	0.2%
Labor Force Participation Rate	62.4%	62.4%	0.0%
ISM Manufacturing	48	48	-1
ISM Services Index	52	54	2

COMMODITY PRICES
ALTERNATIVES

	1/9/2026	12/31/2025	12/31/2025
Generic Crude Oil Future	\$58.85	\$57.42	\$57.42
Generic Gold Future	\$4,518.30	\$4,341.10	\$4,341.10
Dollar Index Spot	\$99.14	\$98.32	\$98.32
Euro Spot	\$1.16	\$1.17	\$1.17

S & P 500
SECTOR RETURNS (%)

	YTD
Discretionary	4.57
Staples	1.98
Energy	4.26
Financials	1.65
Health Care	1.61
Industrials	4.44
Info Tech	0.08
Materials	6.47
Real Estate	0.47
Communication Services	1.99
Utilities	-0.41