

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 |