

MONTHLY INDEX TOTAL RETURN COMPARISON

As of September 30, 2025

Global Equity	1 Mo	3 Mo	YTD	1 Yr	3 Yr	5 Yr	10 Yr	15 Yr	20 Yr
Global									
MSCI All Country World Net ¹	3.6	7.6	18.4	17.3	23.1	13.5	11.9	10.2	8.2
Domestic									
Russell 3000	3.5	8.2	14.4	17.4	24.1	15.7	14.7	14.2	10.7
S&P 500	3.7	8.1	14.8	17.6	24.9	16.5	15.3	14.6	11.0
Russell 1000	3.5	8.0	14.6	17.7	24.6	16.0	15.0	14.5	10.9
Russell 1000 Growth	5.3	10.5	17.2	25.5	31.6	17.6	18.8	17.4	13.3
Russell 1000 Value	1.5	5.3	11.7	9.4	17.0	13.9	10.7	11.2	8.2
Russell 2000	3.1	12.4	10.4	10.8	15.2	11.6	9.8	10.4	8.1
Russell 2000 Growth	4.2	12.2	11.7	13.6	16.7	8.4	9.9	11.0	8.8
Russell 2000 Value	2.0	12.6	9.0	7.9	13.6	14.6	9.2	9.5	7.3
International									
MSCI World ex USA ¹	2.1	5.3	25.3	16.0	21.6	11.6	8.4	6.7	5.6
MSCI World Ex USA Value NR USD ¹	1.7	7.9	31.5	22.9	25.2	16.2	8.5	6.5	5.3
MSCI World ex USA Small Cap ¹	2.2	7.2	29.5	19.4	20.0	9.2	8.3	7.4	6.2
MSCI World ex USA Small Cap Value ¹	2.2	8.6	31.9	21.2	22.1	12.8	8.4	7.3	6.6
MSCI Emerging Markets ¹	7.2	10.6	27.5	17.3	18.2	7.0	8.0	4.0	6.1
Real Estate									
DJ Global Select REIT	1.0	4.8	8.7	-0.2	10.1	7.7	4.6	6.7	n/a
DJ US Select REIT	1.1	5.1	4.5	-1.7	10.5	9.4	5.7	7.8	6.2
DJ Global ex-US Select REIT	0.5	3.7	25.6	5.4	9.0	3.4	2.2	4.3	n/a
US Fixed Income	1 Mo	3 Mo	YTD	1 Yr	3 Yr	5 Yr	10 Yr	15 Yr	20 Yr
ICE BofA US 3 Month Tbill	0.3	1.1	3.2	4.4	4.8	3.0	2.1	1.4	1.7
ICE BofA 1-5 Yr US Treasury	0.2	1.1	4.6	3.8	4.4	1.1	1.7	1.5	2.4
ICE BofA 1-5 Yr US Corporate	0.4	1.6	5.5	5.1	6.3	2.2	2.9	2.9	3.6
ICE BofA 1-5 Yr US Muni	0.3	1.6	3.7	3.3	3.9	1.3	1.6	1.6	2.3
ICE BofA 5-10 Yr US Treasury	0.4	1.6	6.9	2.8	4.1	-1.2	1.4	2.0	3.4
ICE BofA 5-10 Yr US Corporate	1.1	2.7	8.2	5.3	8.2	1.2	3.6	4.0	4.7
ICE BofA 5-10 Yr US Muni	1.5	2.9	4.6	3.3	4.8	1.1	2.3	2.8	3.6
ICE BofA 10+ Yr US Treasury	3.0	2.5	5.9	-3.1	0.7	-7.4	0.0	2.0	3.4
ICE BofA 10+ Yr US Corporate	3.1	4.0	7.8	1.3	7.5	-1.8	3.4	4.3	4.9
ICE BofA 10+ Yr US Muni	3.6	3.7	1.3	0.0	5.3	0.6	2.6	3.5	3.9
Bloomberg US Aggregate	1.1	2.0	6.1	2.9	4.9	-0.4	1.8	2.3	3.2
ICE BofA 1-5 Yr US Inflation Linked Treasury	-0.2	1.6	6.2	5.7	5.4	3.5	3.1	2.4	3.0
Bloomberg US Corporate High Yield	0								