

YCHARTS

Monthly Market Wrap

August 2025

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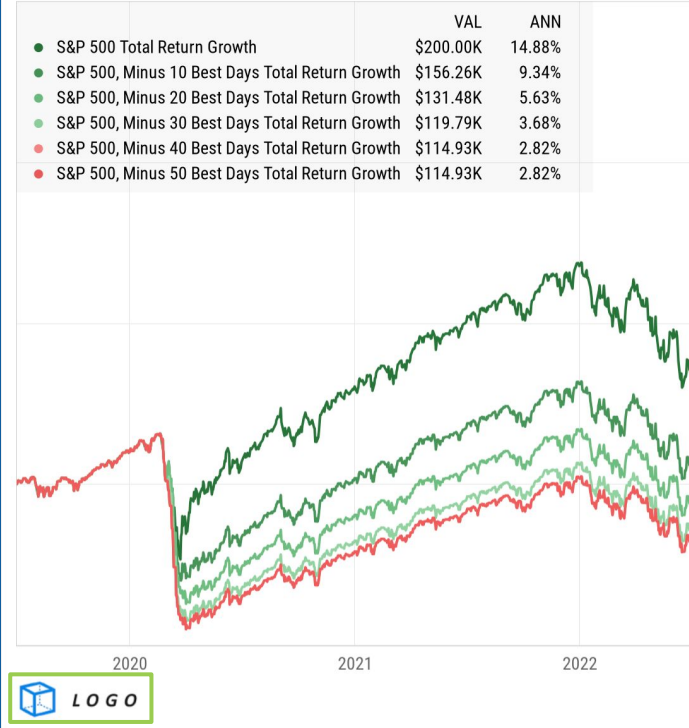
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Released September 4, 2025

The Effect of Missing the Best Market Days



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Asset Class Performance

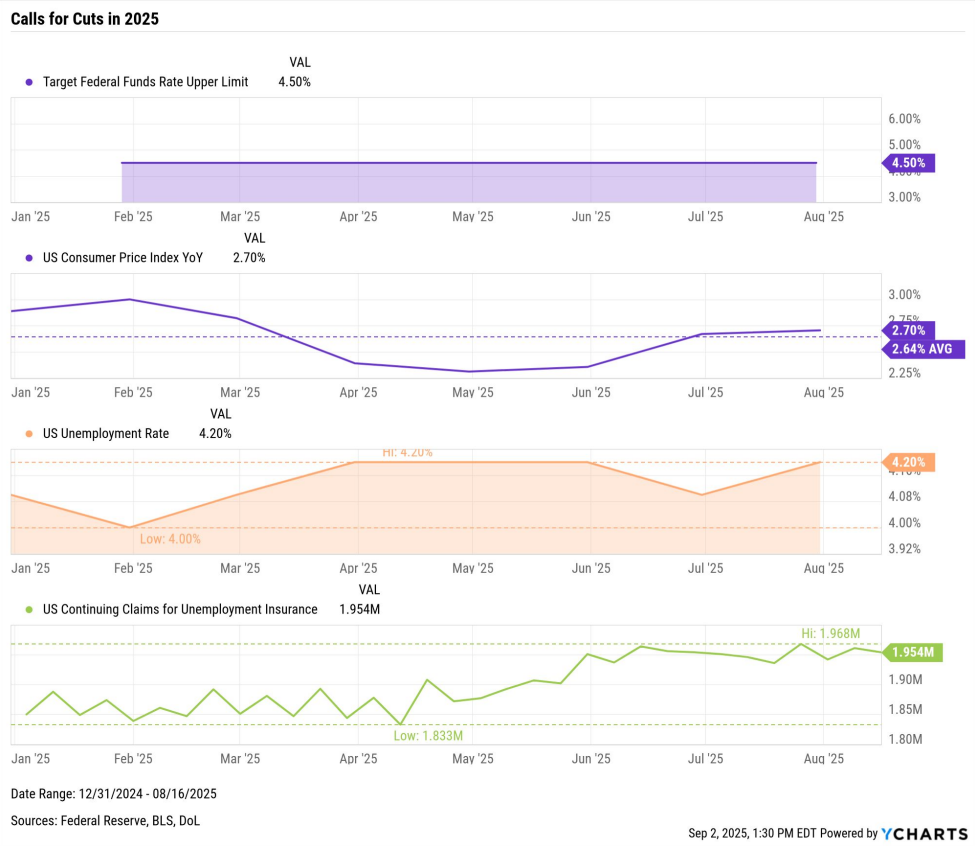
YTD Total Return	1 month Total Return	3 month Total Return	6 month Total Return	1 year Total Return	3 year Total Return	5 year Total Return	10 year Total Return
World exUSA 23.3%	US Small 7.1%	US Small 14.9%	Emerging Markets 16.9%	US Growth 22.6%	US Growth 25.0%	Commodities 16.5%	US Growth 17.9%
Emerging Markets 19.6%	World exUSA 4.4%	US Growth 11.6%	World exUSA 15.4%	Emerging Markets 17.7%	S&P 500 19.5%	US Growth 15.2%	S&P 500 14.6%
US Growth 11.3%	US Value 3.2%	Emerging Markets 9.9%	US Growth 13.2%	S&P 500 15.9%	World exUSA 17.5%	S&P 500 14.7%	US Value 10.2%
S&P 500 10.8%	US Real Estate 2.9%	S&P 500 9.6%	US Small 10.2%	World exUSA 15.5%	US Value 12.9%	US Value 13.0%	US Small 8.9%
US Value 10.0%	S&P 500 2.0%	Commodities 8.0%	S&P 500 9.2%	Commodities 9.3%	Emerging Markets 11.4%	World exUSA 11.1%	World exUSA 8.2%
US Small 7.1%	Emerging Markets 1.5%	US Value 7.3%	US Value 4.7%	US Value 9.3%	US Small 10.3%	US Small 10.1%	Emerging Markets 7.4%
US Real Estate 6.1%	Aggregate Bonds 1.2%	World exUSA 5.6%	Commodities 3.4%	US Small 8.2%	US Real Estate 4.4%	US Real Estate 6.5%	US Real Estate 7.0%
Commodities 5.4%	US Growth 1.1%	US Real Estate 3.5%	Aggregate Bonds 2.2%	Aggregate Bonds 3.1%	Aggregate Bonds 3.0%	Emerging Markets 5.7%	Commodities 3.5%
Aggregate Bonds 5.0%	US Treasuries 1.1%	Aggregate Bonds 2.5%	US Treasuries 1.7%	US Treasuries 2.4%	Muni Bonds 2.6%	Muni Bonds 0.4%	Muni Bonds 2.2%
US Treasuries 4.5%	Muni Bonds 0.9%	US Treasuries 1.9%	US Real Estate 0.1%	US Real Estate 1.0%	US Treasuries 2.1%	Aggregate Bonds -0.7%	Aggregate Bonds 1.8%
Muni Bonds 0.3%	Commodities -0.2%	Muni Bonds 1.3%	Muni Bonds -1.2%	Muni Bonds 0.1%	Commodities 1.7%	US Treasuries -1.5%	US Treasuries 1.2%

Past performance is no guarantee of future results. You cannot invest directly in an index.

*Data as of 8/31/2025

Asset	Index
US Real Estate	Dow Jones US Real Estate Index Total Return
US Growth Stocks	Russell 1000 Growth Total Return
Commodities	S&P GSCI Total Return
US Small Cap	Russell 2000 Total Return
S&P 500	S&P 500 Total Return
US Value Stocks	Russell 1000 Value Total Return
World ex USA	MSCI World Ex USA Total Return
Emerging Markets	MSCI Emerging Markets Total Return
Aggregate Bonds	Barclays US Aggregate Total Return
Muni Bonds	Barclays Municipal Bond Total Return
US Treasuries	Barclays US Treasury Total Return

Off the YCharts! Expectations for Rate Cuts Accelerate



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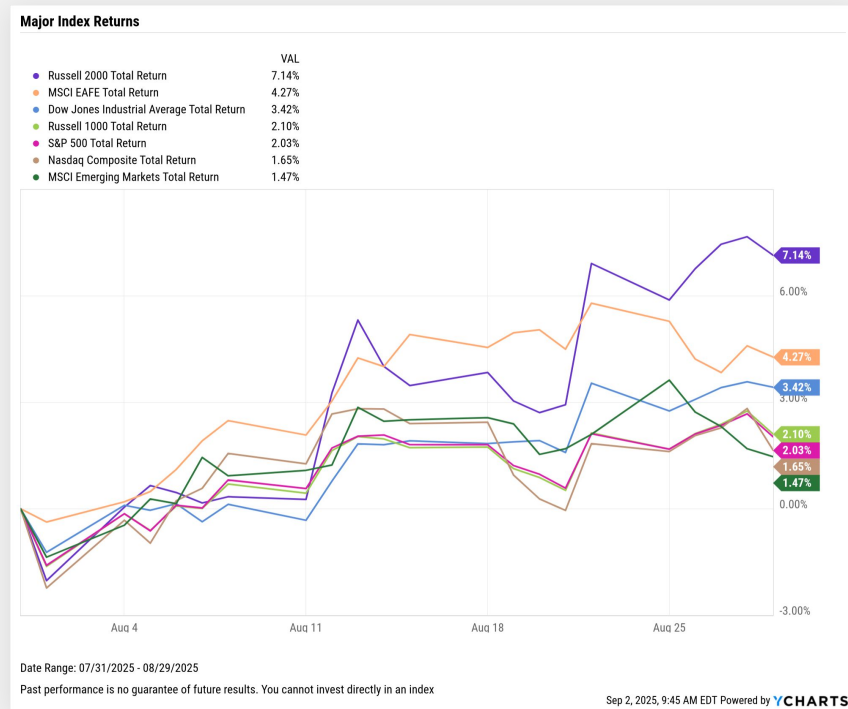
Equity Performance

Charts and tables highlighting the performance of stock market indices, sectors, and individual securities

Key Stock Market Index Performance

August 2025:

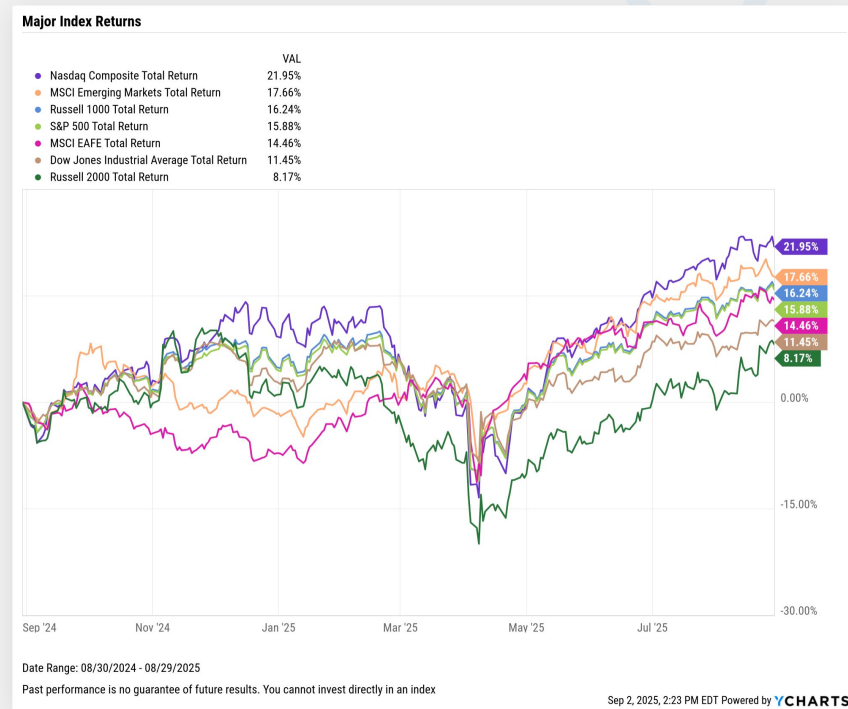
All indices positive, led by small-cap Russell 2000 up 7.1%



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Trailing Twelve Months (TTM):

Nasdaq up nearly 22%, Russell 2000 now positive TTM

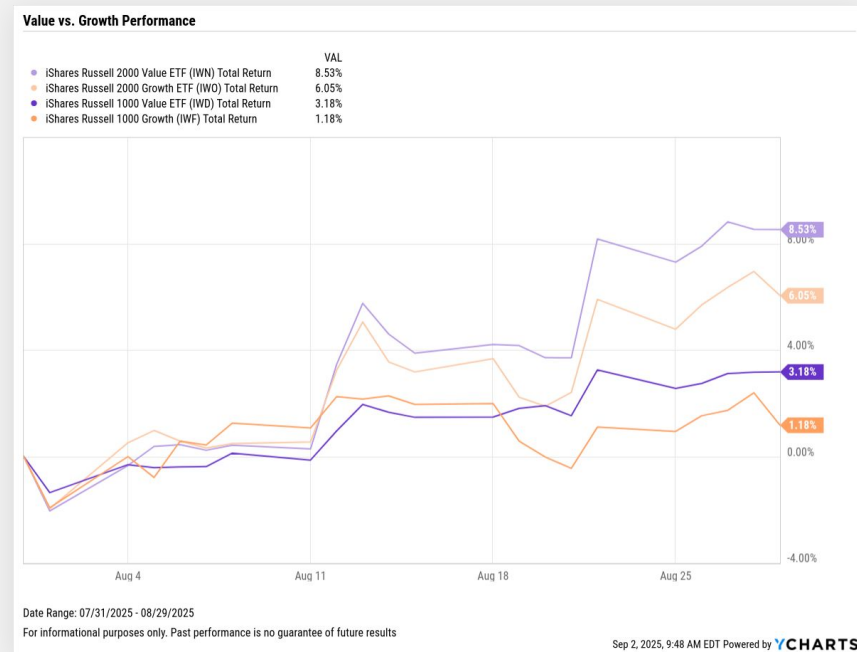


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Value vs. Growth Performance

August 2025:

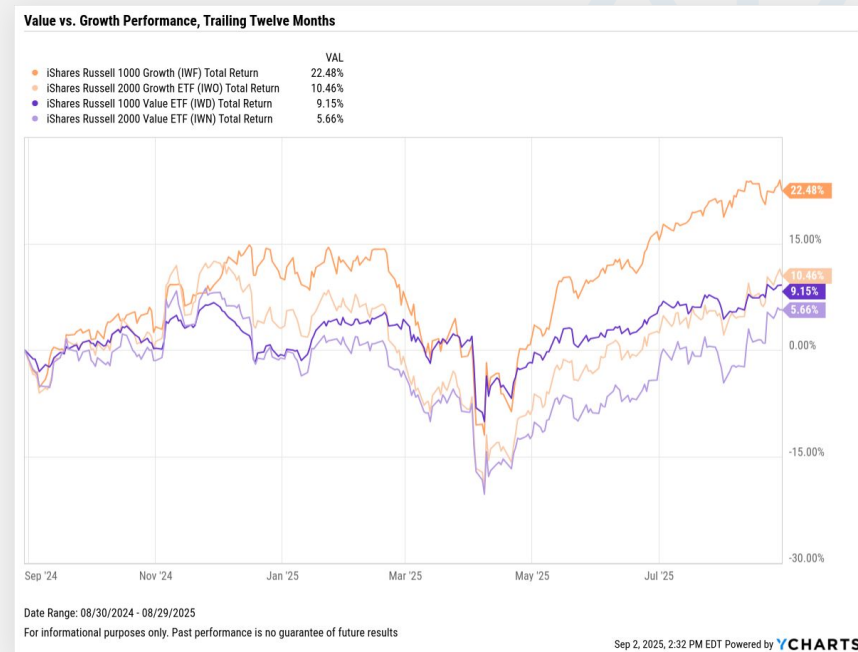
Small-caps lead following four straight months of large-cap dominance, all equity styles positive



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Trailing Twelve Months (TTM):

Large-cap Growth leads with 22.5% gain, Small-cap growth shoots up to second TTM

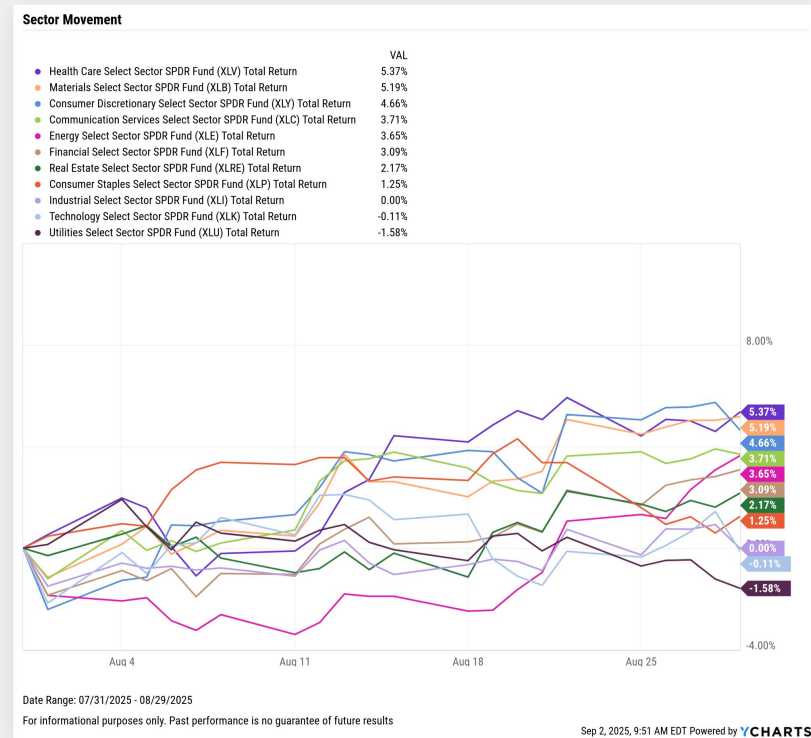


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Domestic Sector Performance

August 2025:

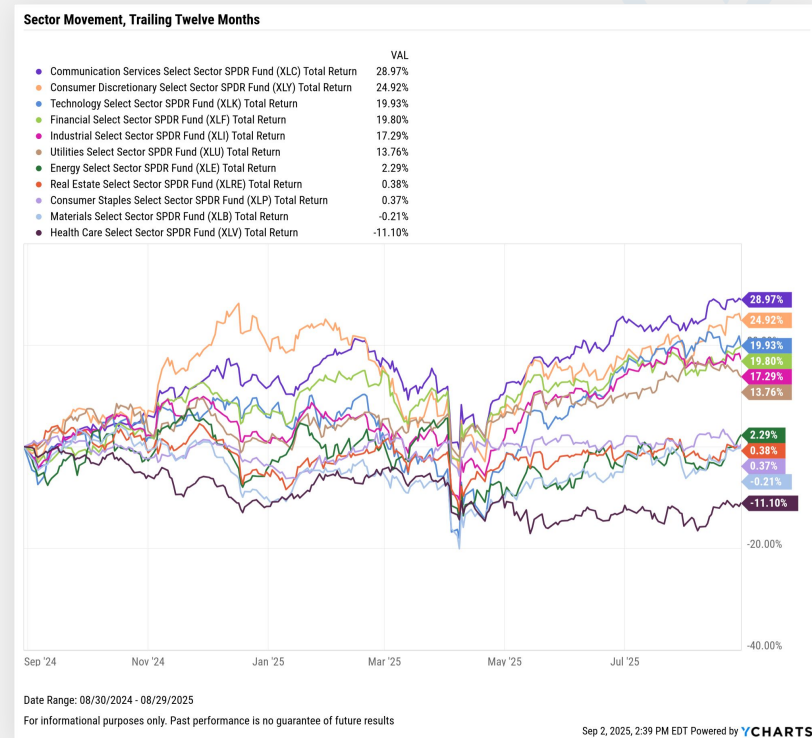
Health Care reverses course, leading all sectors



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Trailing Twelve Months (TTM):

Comm Services leads; Health Care & Materials lag



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Best-Performing S&P 500 Stocks of the Month

Ticker	Name	Aug Price Returns	2025 Price Returns	Industry	Sector
ALB	Albemarle Corp.	▲ 25.2%	▼ -1.3%	Chemicals	Materials
UNH	UnitedHealth Group, Inc.	▲ 24.2%	▼ -38.7%	Health Care Providers & Services	Health Care
INTC	Intel Corp.	▲ 23.0%	▲ 21.4%	Semiconductors	Information Technology
HUM	Humana, Inc.	▲ 21.5%	▲ 19.7%	Health Care Providers & Services	Health Care
IDXX	IDEXX Laboratories, Inc.	▲ 21.1%	▲ 56.5%	Health Care Equipment & Supplies	Health Care
DAY	Dayforce, Inc.	▲ 21.0%	▼ -4.0%	Professional Services	Industrials
VTRS	Viatis, Inc.	▲ 20.7%	▼ -15.3%	Pharmaceuticals	Health Care
APA	APA Corp.	▲ 20.4%	▲ 0.6%	Oil, Gas & Consumable Fuels	Energy
NEM	Newmont Corp.	▲ 19.8%	▲ 99.9%	Metals & Mining	Materials
EXPE	Expedia Group, Inc.	▲ 19.2%	▲ 15.3%	Hotels, Restaurants & Leisure	Consumer Discretionary

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Worst-Performing S&P 500 Stocks of the Month

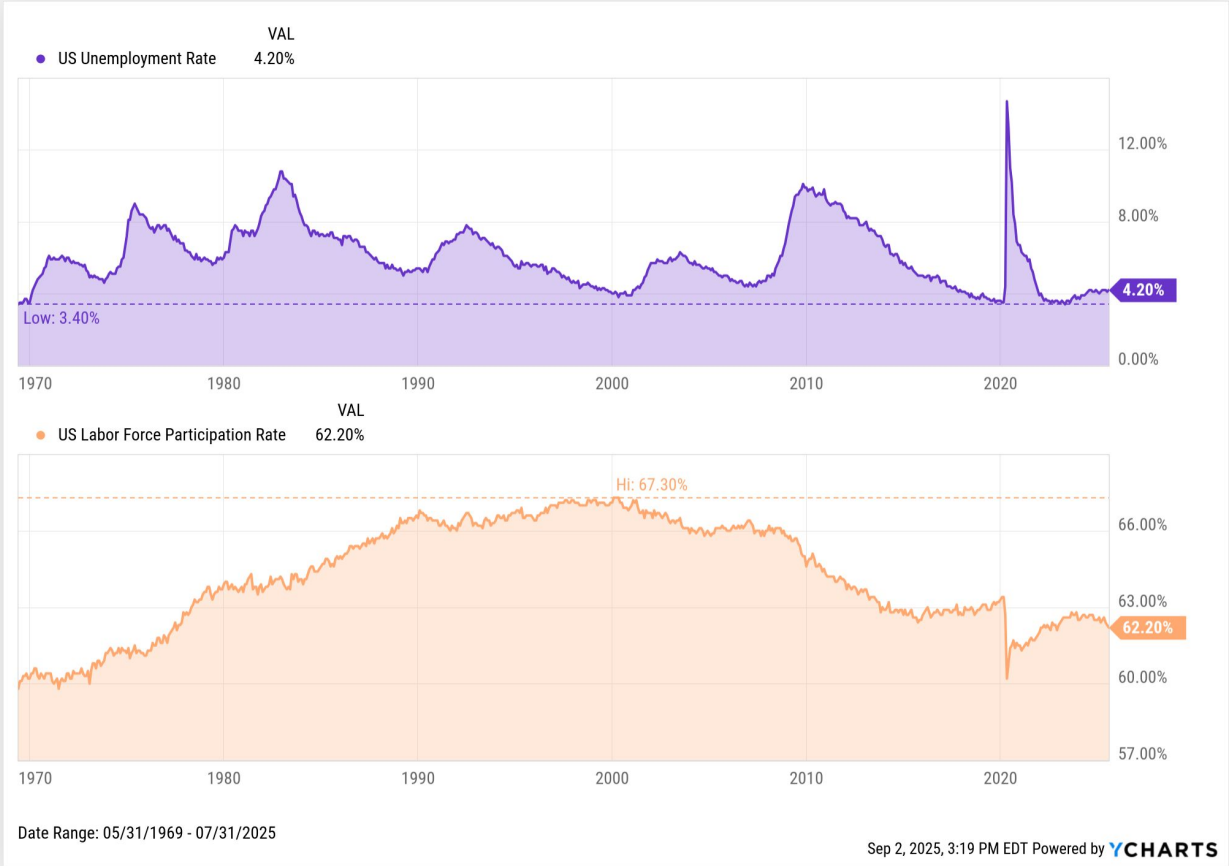
Ticker	Name	Aug Price Returns	2025 Price Returns	Industry	Sector
TTD	The Trade Desk, Inc.	▼ -37.1%	▼ -53.5%	Media	Communication Services
SMCI	Super Micro Computer, Inc.	▼ -29.6%	▲ 36.3%	Technology Hardware	Information Technology
IT	Gartner, Inc.	▼ -25.8%	▼ -48.2%	IT Services	Information Technology
FTNT	Fortinet, Inc.	▼ -21.2%	▼ -16.6%	Software	Information Technology
COIN	Coinbase Global, Inc.	▼ -19.4%	▲ 22.7%	Capital Markets	Financials
MRNA	Moderna, Inc.	▼ -18.5%	▼ -42.1%	Biotechnology	Health Care
INTU	Intuit, Inc.	▼ -15.0%	▲ 6.1%	Software	Information Technology
VRTX	Vertex Pharmaceuticals, Inc.	▼ -14.4%	▼ -2.9%	Biotechnology	Health Care
TDG	TransDigm Group, Inc.	▼ -13.0%	▲ 10.4%	Aerospace & Defense	Industrials
NRG	NRG Energy, Inc.	▼ -12.9%	▲ 61.3%	Electric Utilities	Utilities

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Economic Data

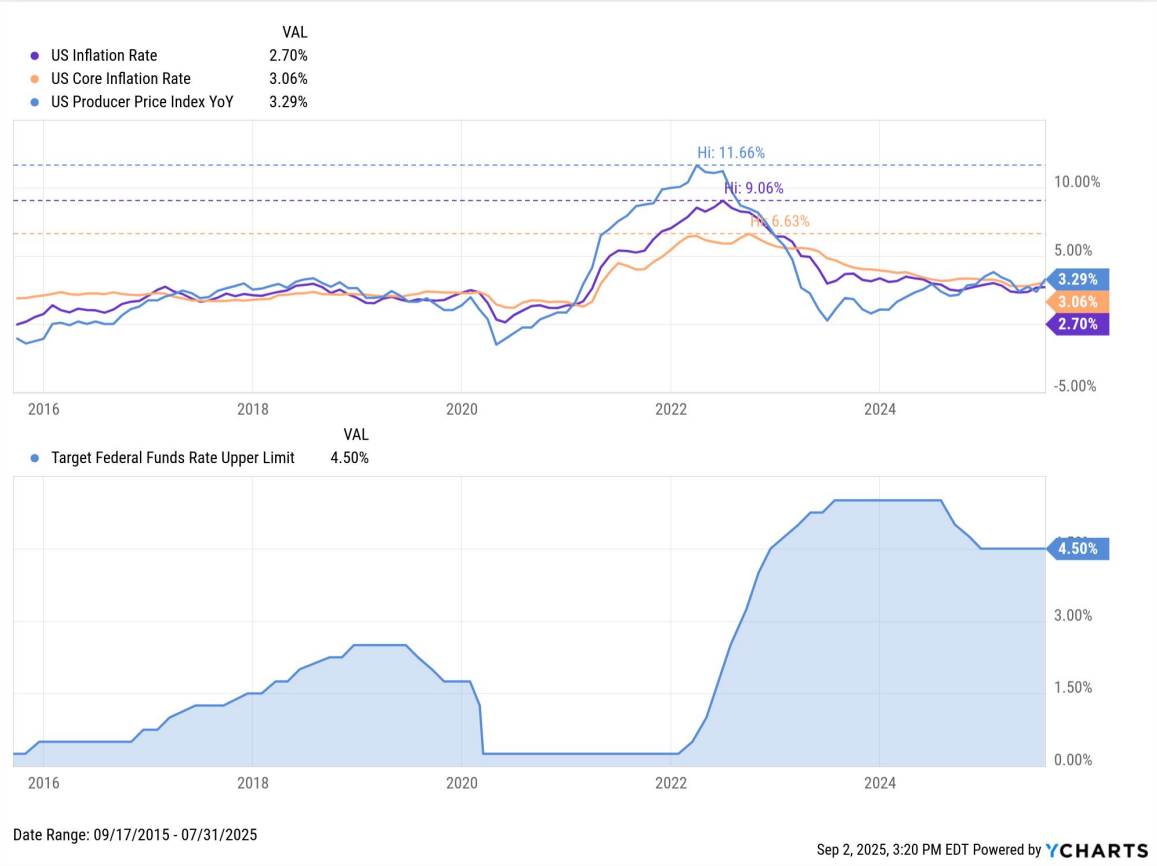
Select charts and data highlighting the major economic events of the past month

Employment



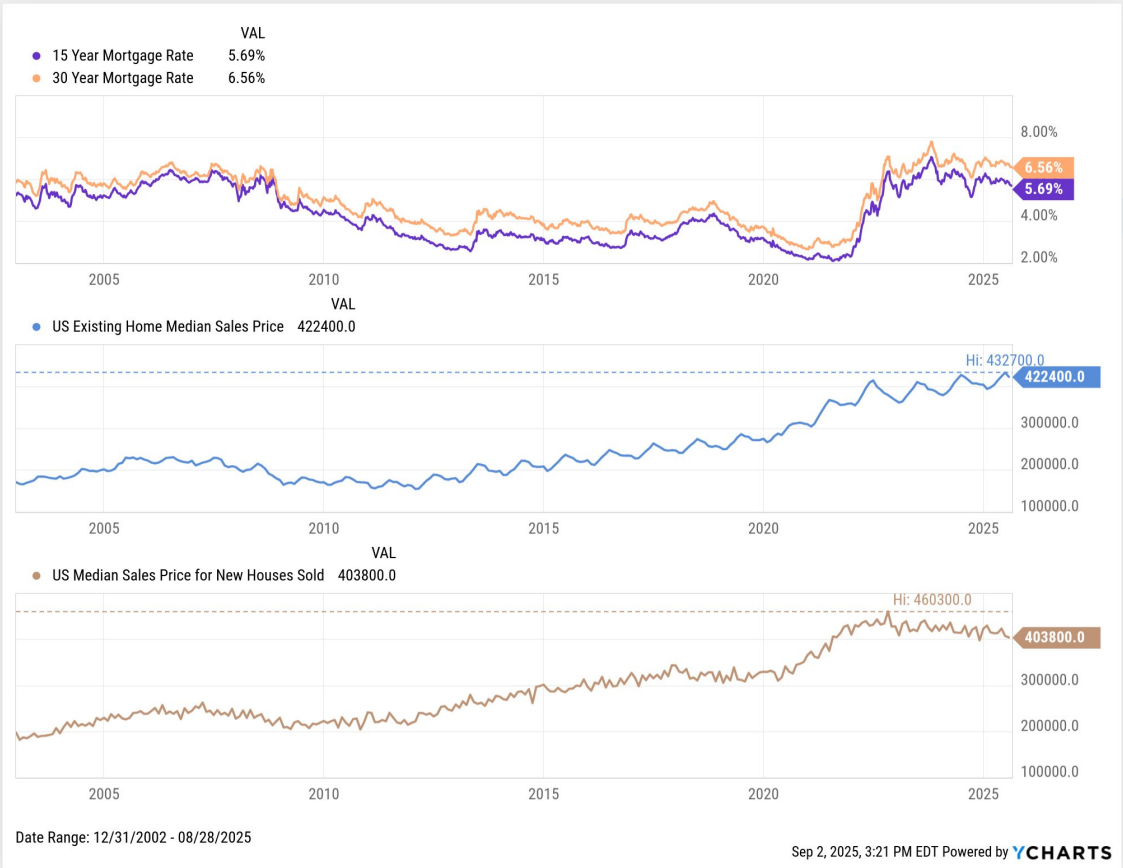
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Inflation vs. Fed Funds Rate



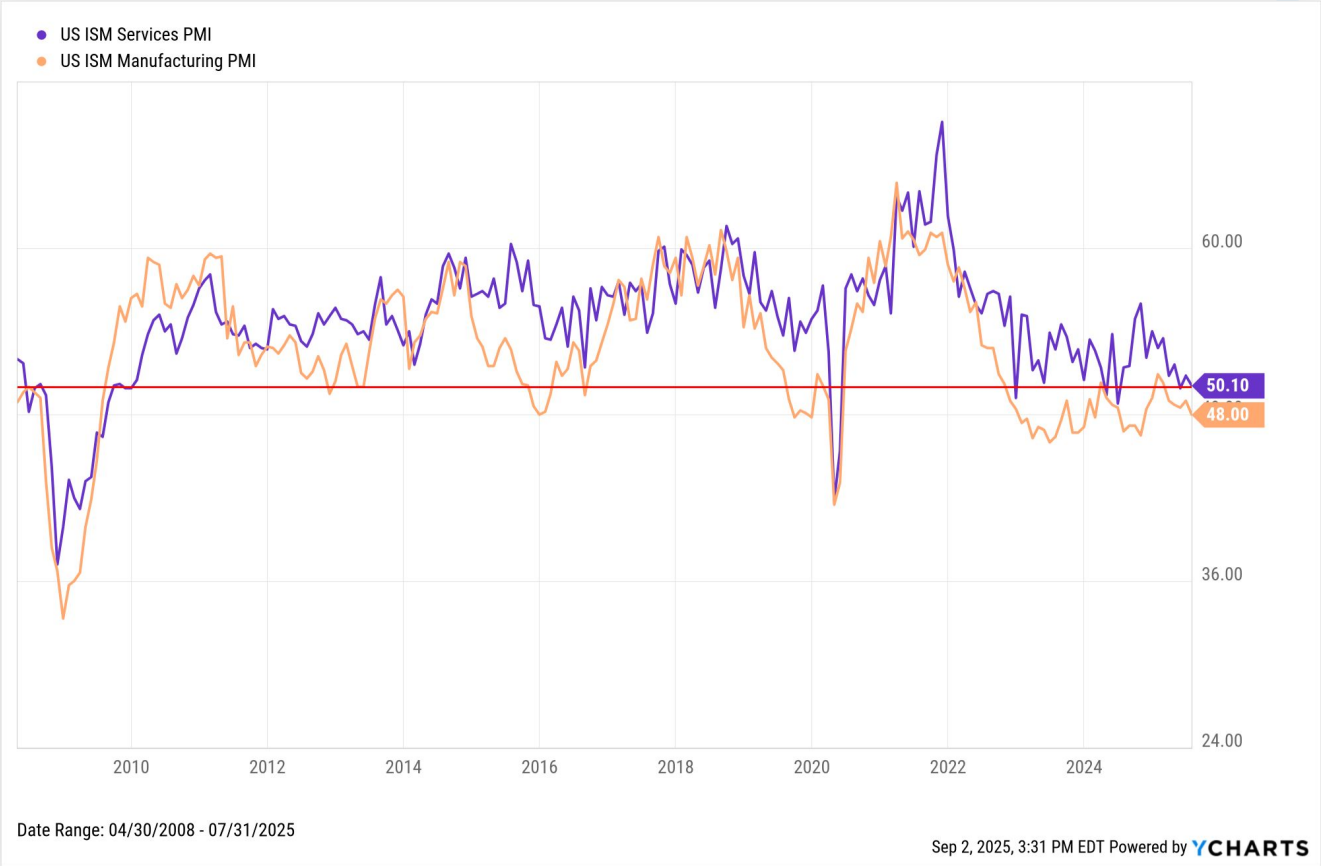
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Housing Prices and Mortgage Rates



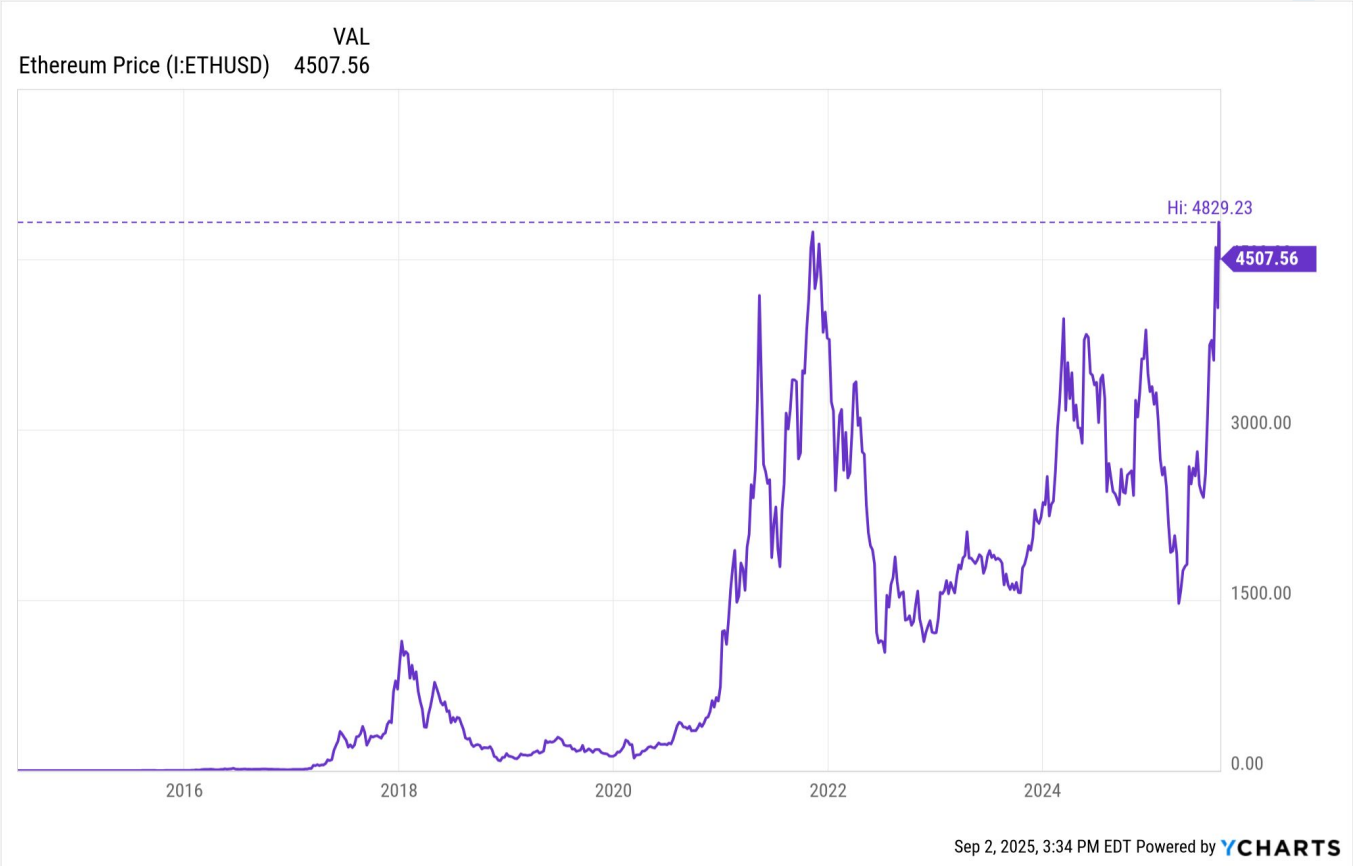
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Services Sector Edges Back Towards Contraction Territory



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Ethereum Hits New ATH Amidst Crypto Regulation



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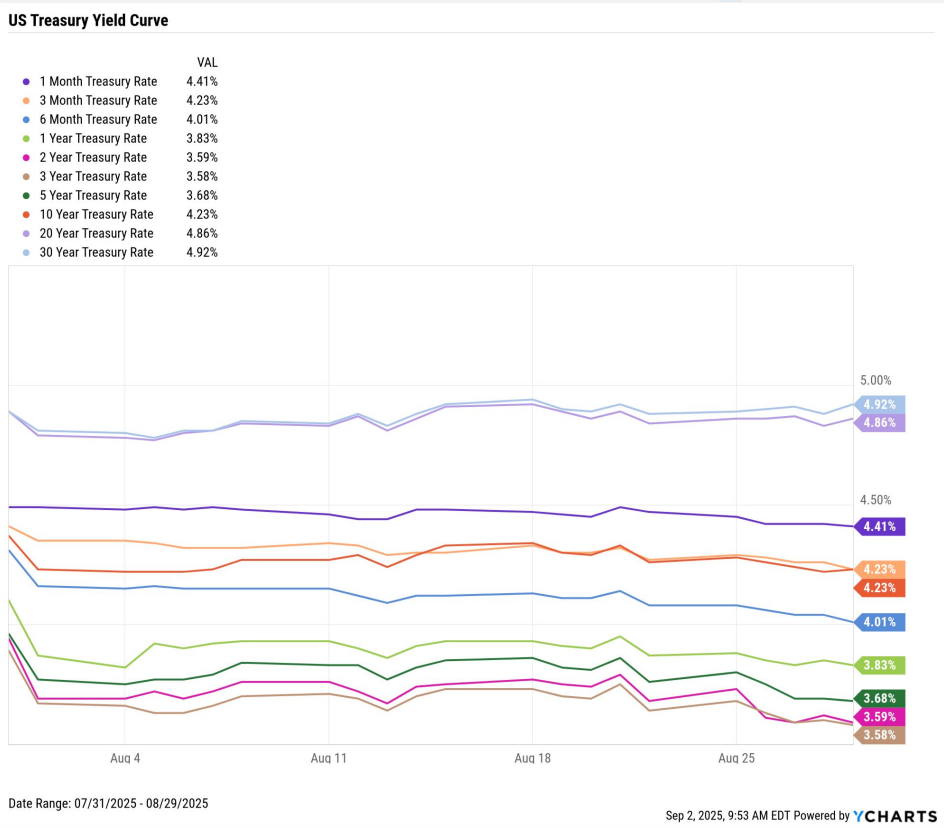
Fixed Income

Featuring the US Treasury Yield Curve, plus
performance of select bond ETFs

US Treasury Yield Curve

Duration	Rate	MoM Δ
1-Month	4.41%	▼ 8 bps
3-Month	4.23%	▼ 18 bps
6-Month	4.01%	▼ 30 bps
1-Year	3.83%	▼ 27 bps
2-Year	3.59%	▼ 35 bps
3-Year	3.58%	▼ 31 bps
5-Year	3.68%	▼ 28 bps
10-Year	4.23%	▼ 14 bps
20-Year	4.86%	▼ 3 bps
30-Year	4.92%	▲ 3 bps

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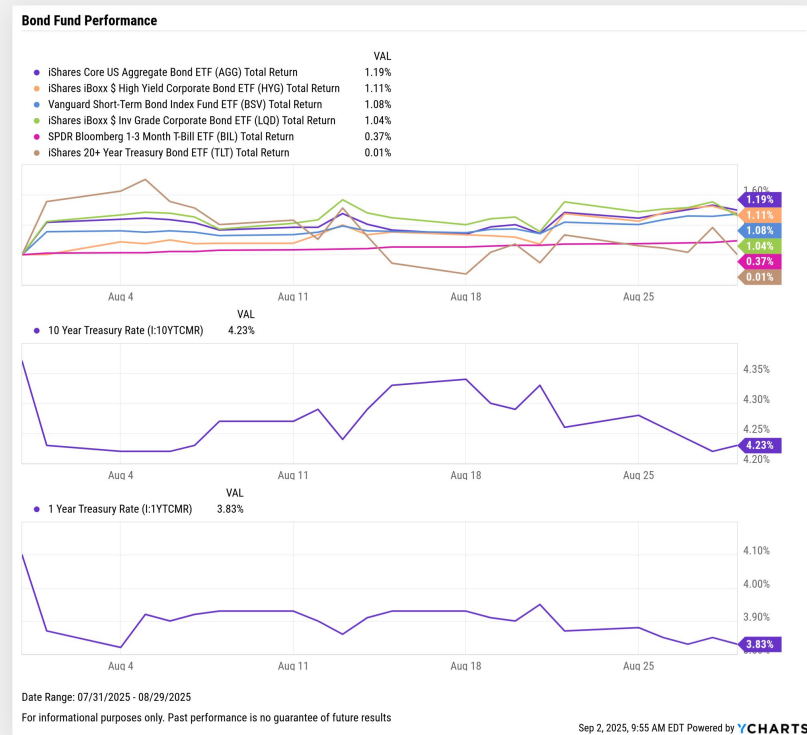


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Bond Fund Performance

August 2025:

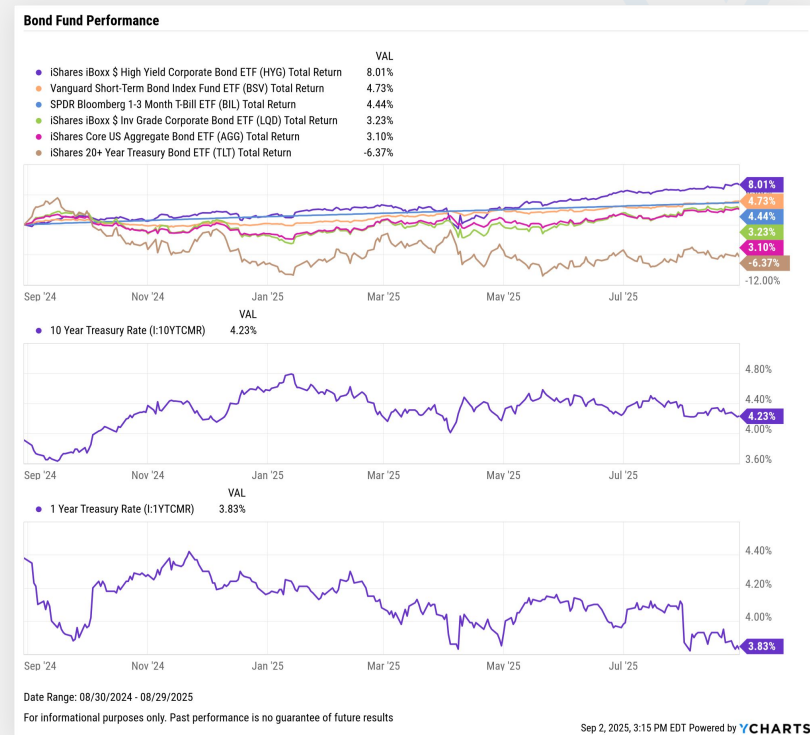
Yields decrease across the curve, TLT flat



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Trailing Twelve Months (TTM):

High-yield corporate bond up 8% TTM; TLT down 6.4%



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