

YCHARTS

Monthly Market Wrap

March 2025

About this deck:

Use these visuals about important investing concepts in your own presentations; share with clients, prospects, colleagues, or followers online! Looking for a PowerPoint version of this deck?

[Download it here.](#)

If you've uploaded a logo to YCharts, all visuals in YCharts will appear with that logo.

Not yet a YCharts user? Get started today:

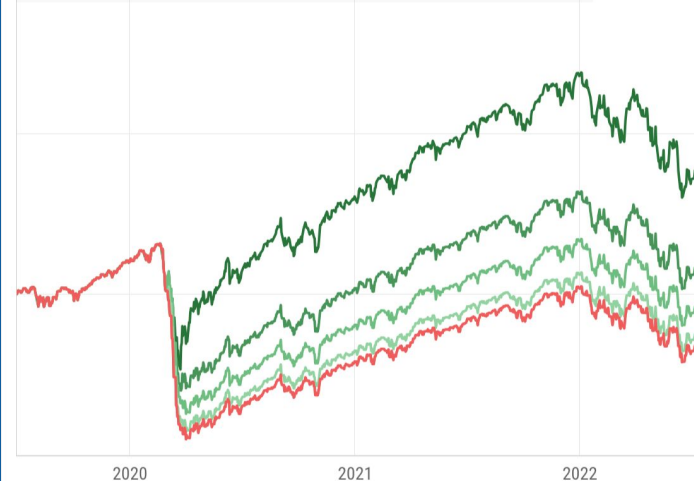
 [Start a Free Trial](#)

 [Book a Demo](#)

Released April 2, 2025

The Effect of Missing the Best Market Days

	VAL	ANN
● S&P 500 Total Return Growth	\$200.00K	14.88%
● S&P 500, Minus 10 Best Days Total Return Growth	\$156.26K	9.34%
● S&P 500, Minus 20 Best Days Total Return Growth	\$131.48K	5.63%
● S&P 500, Minus 30 Best Days Total Return Growth	\$119.79K	3.68%
● S&P 500, Minus 40 Best Days Total Return Growth	\$114.93K	2.82%
● S&P 500, Minus 50 Best Days Total Return Growth	\$114.93K	2.82%



YCharts clients: have your firm logo added to all charts!

YCHARTS

Asset Class Performance

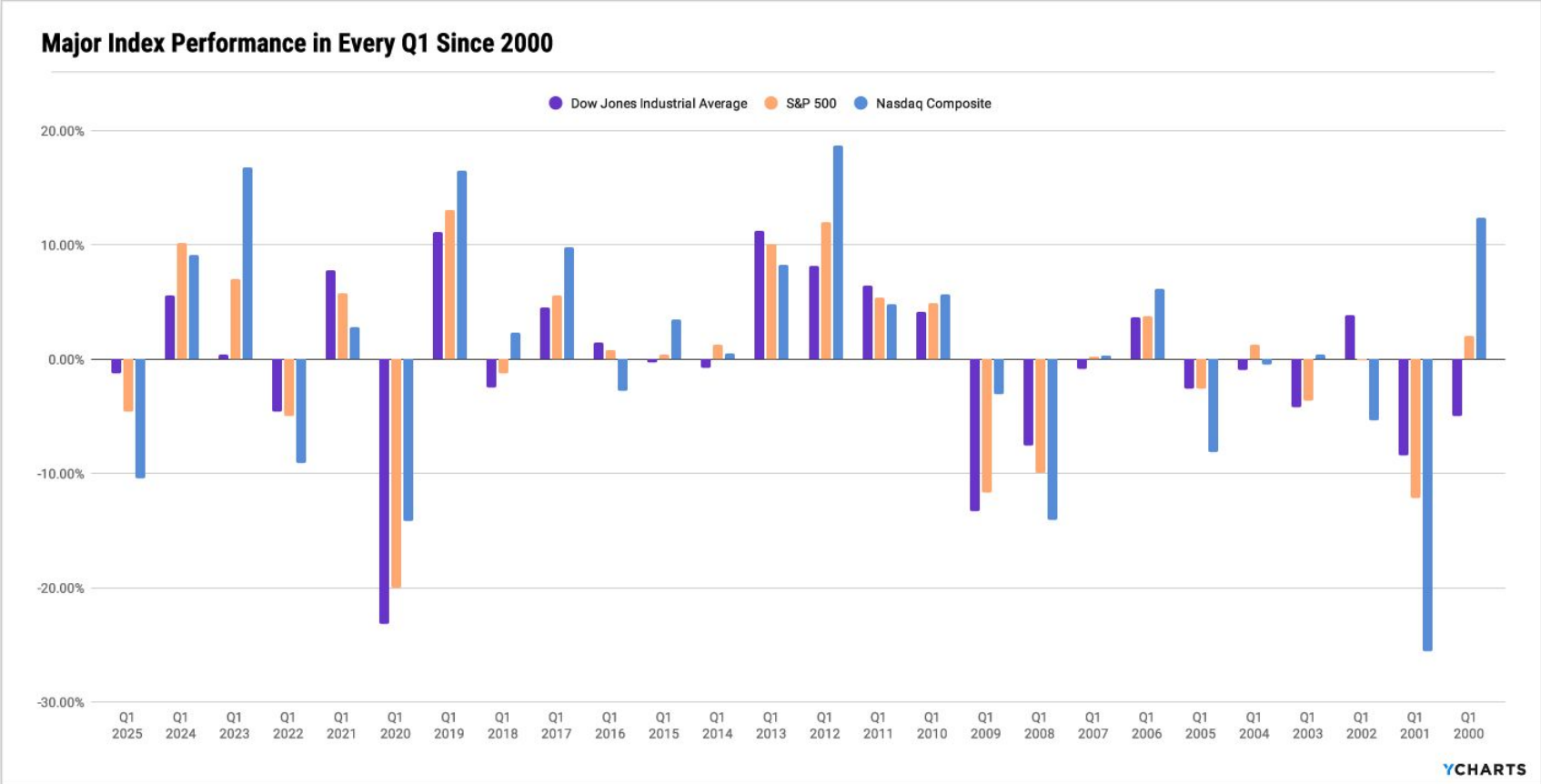
YTD Total Return	1 month Total Return	3 month Total Return	6 month Total Return	1 year Total Return	3 year Total Return	5 year Total Return	10 year Total Return
World exUSA 6.3%	Commodities 2.9%	World exUSA 6.3%	Commodities 8.9%	US Real Estate 9.8%	US Growth 10.1%	Commodities 20.7%	US Growth 15.1%
Commodities 4.9%	Emerging Markets 0.7%	Commodities 4.9%	US Value 0.1%	Emerging Markets 8.6%	S&P 500 9.1%	US Growth 20.1%	S&P 500 12.5%
US Real Estate 3.5%	US Treasuries 0.2%	US Real Estate 3.5%	US Treasuries -0.3%	S&P 500 8.3%	US Value 6.6%	S&P 500 18.6%	US Value 8.8%
Emerging Markets 3.0%	Aggregate Bonds 0.0%	Emerging Markets 3.0%	Aggregate Bonds -0.4%	US Growth 7.8%	World exUSA 6.3%	US Value 16.1%	US Small 6.3%
US Treasuries 2.9%	World exUSA -0.5%	US Treasuries 2.9%	Muni Bonds -1.4%	US Value 7.2%	Emerging Markets 1.9%	US Small 13.3%	World exUSA 6.0%
Aggregate Bonds 2.8%	Muni Bonds -1.7%	Aggregate Bonds 2.8%	World exUSA -1.5%	World exUSA 5.9%	Muni Bonds 1.5%	World exUSA 12.7%	US Real Estate 5.6%
US Value 2.1%	US Real Estate -2.4%	US Value 2.1%	S&P 500 -2.0%	Aggregate Bonds 4.9%	Commodities 1.3%	US Real Estate 9.7%	Emerging Markets 4.1%
Muni Bonds -0.2%	US Value -2.8%	Muni Bonds -0.2%	US Growth -3.6%	US Treasuries 4.5%	US Small 0.5%	Emerging Markets 8.4%	Commodities 2.5%
S&P 500 -4.3%	S&P 500 -5.6%	S&P 500 -4.3%	US Real Estate -4.6%	Commodities 3.8%	Aggregate Bonds 0.5%	Muni Bonds 1.1%	Muni Bonds 2.1%
US Small -9.5%	US Small -6.8%	US Small -9.5%	Emerging Markets -5.1%	Muni Bonds 1.2%	US Treasuries 0.0%	Aggregate Bonds -0.4%	Aggregate Bonds 1.5%
US Growth -10.0%	US Growth -8.4%	US Growth -10.0%	US Small -9.2%	US Small -4.0%	US Real Estate -0.8%	US Treasuries -1.7%	US Treasuries 1.0%

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

*Data as of 3/31/2025

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! After the First Quarter, the Score is...



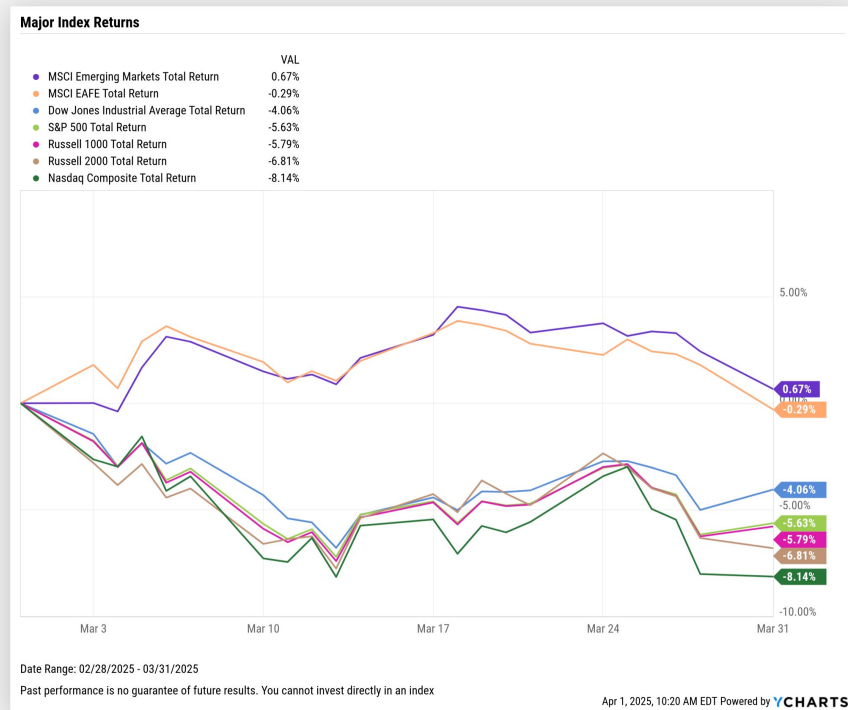
Equity Performance

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

Key Stock Market Index Performance

March 2025:

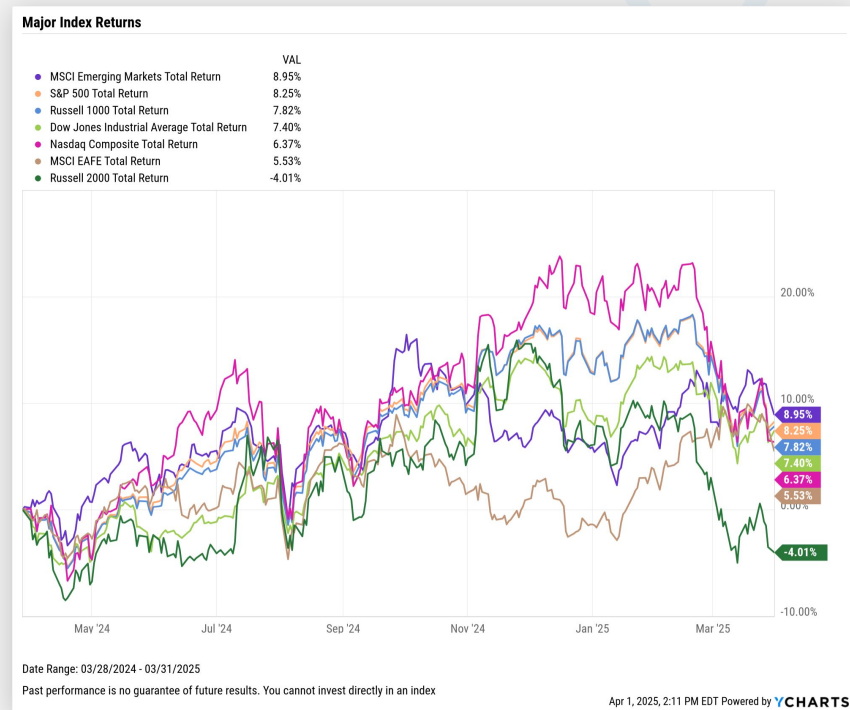
Domestic equity indices fell further into the red to end Q1



View and Modify in YCharts →

Trailing Twelve Months (TTM):

Russell 2000 down 4% while all other indices are positive



View and Modify in YCharts →

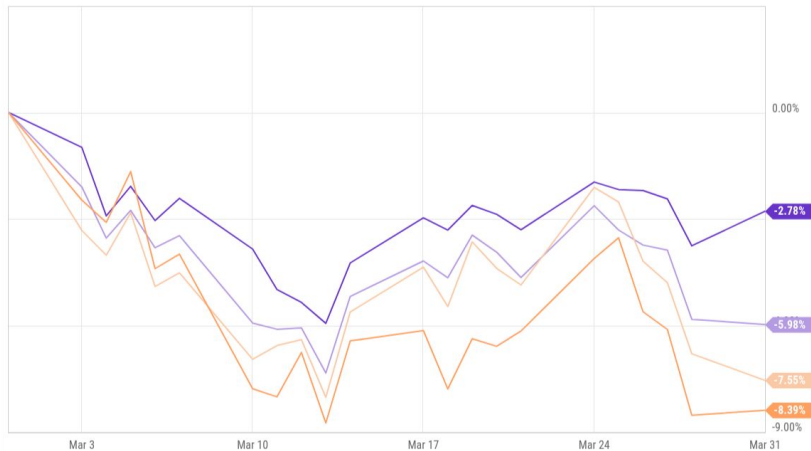
Value vs. Growth Performance

March 2025:

All equity styles lower in March, Large-cap Growth biggest laggard

Value vs. Growth Performance

• iShares Russell 1000 Value ETF (IWD) Total Return	VAL
• iShares Russell 2000 Value ETF (IWN) Total Return	-2.78%
• iShares Russell 2000 Growth ETF (IWO) Total Return	-5.98%
• iShares Russell 1000 Growth (IWF) Total Return	-7.55%
	-8.39%



Date Range: 02/28/2025 - 03/31/2025

For informational purposes only. Past performance is no guarantee of future results

Apr 1, 2025, 10:21 AM EDT Powered by YCHARTS

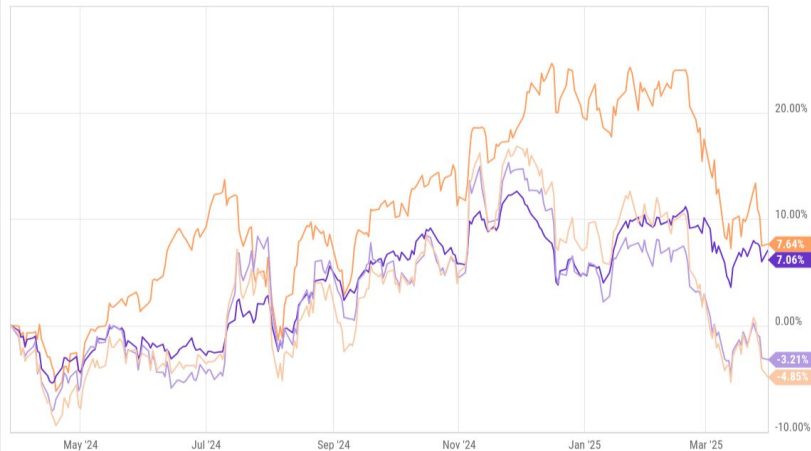
[View and Modify in YCharts →](#)

Trailing Twelve Months (TTM):

Large-cap styles lead Small-caps, Large-caps positive and Small-caps negative

Value vs. Growth Performance, Trailing Twelve Months

• iShares Russell 1000 Growth (IWF) Total Return	VAL
• iShares Russell 1000 Value ETF (IWD) Total Return	7.64%
• iShares Russell 2000 Value ETF (IWN) Total Return	7.06%
• iShares Russell 2000 Growth ETF (IWO) Total Return	-3.21%
	-4.85%



Date Range: 03/28/2024 - 03/31/2025

For informational purposes only. Past performance is no guarantee of future results

Apr 1, 2025, 2:58 PM EDT Powered by YCHARTS

[View and Modify in YCharts →](#)

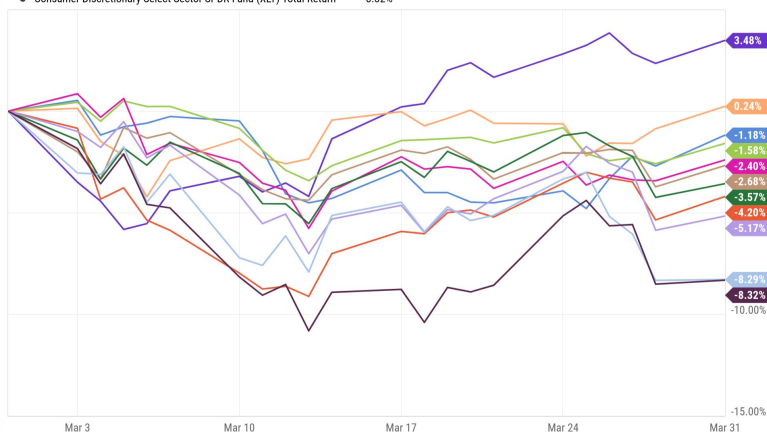
Domestic Sector Performance

March 2025:

Cyclically sensitive sectors suffer; Energy, Utilities lead

Sector Movement

	VAL
Energy Select Sector SPDR Fund (XLE) Total Return	3.48%
Utilities Select Sector SPDR Fund (XLU) Total Return	0.24%
Consumer Staples Select Sector SPDR Fund (XLP) Total Return	-1.18%
Health Care Select Sector SPDR Fund (XLV) Total Return	-1.58%
Real Estate Select Sector SPDR Fund (XLRE) Total Return	-2.40%
Materials Select Sector SPDR Fund (XLB) Total Return	-2.68%
Industrial Select Sector SPDR Fund (XLI) Total Return	-3.57%
Financial Select Sector SPDR Fund (XLF) Total Return	-4.20%
Communication Services Select Sector SPDR Fund (XLC) Total Return	-5.17%
Technology Select Sector SPDR Fund (XLK) Total Return	-8.29%
Consumer Discretionary Select Sector SPDR Fund (XLY) Total Return	-8.32%



Date Range: 02/28/2025 - 03/31/2025

For informational purposes only. Past performance is no guarantee of future results

Apr 1, 2025, 10:23 AM EDT Powered by YCHARTS

[View and Modify in YCharts →](#)

Trailing Twelve Months (TTM):

Utilities and Financials both up 20%

Sector Movement, Trailing Twelve Months

	VAL
Utilities Select Sector SPDR Fund (XLU) Total Return	23.75%
Financial Select Sector SPDR Fund (XLF) Total Return	20.09%
Communication Services Select Sector SPDR Fund (XLC) Total Return	19.44%
Consumer Staples Select Sector SPDR Fund (XLP) Total Return	9.72%
Real Estate Select Sector SPDR Fund (XLRE) Total Return	9.52%
Consumer Discretionary Select Sector SPDR Fund (XLY) Total Return	8.32%
Industrial Select Sector SPDR Fund (XLI) Total Return	5.59%
Energy Select Sector SPDR Fund (XLE) Total Return	2.19%
Health Care Select Sector SPDR Fund (XLV) Total Return	0.42%
Technology Select Sector SPDR Fund (XLK) Total Return	-0.17%
Materials Select Sector SPDR Fund (XLB) Total Return	-5.66%



Date Range: 03/28/2024 - 03/31/2025

For informational purposes only. Past performance is no guarantee of future results

Apr 1, 2025, 3:00 PM EDT Powered by YCHARTS

[View and Modify in YCharts →](#)

YCHARTS

Best-Performing S&P 500 Stocks of the Month

Ticker	Name	Mar Price Returns	2025 Price Returns	Industry	Sector
DG	Dollar General Corp	▲ 18.5%	▲ 16.0%	Consumer Staples Distribution & Retail	Consumer Staples
HII	Huntington Ingalls Industries	▲ 16.2%	▲ 8.0%	Aerospace & Defense	Industrials
MOS	The Mosaic Co	▲ 12.9%	▲ 9.9%	Chemicals	Materials
HCA	HCA Healthcare Inc	▲ 12.8%	▲ 15.1%	Health Care Providers & Services	Health Care
WRB	WR Berkley Corp	▲ 12.8%	▲ 21.6%	Insurance	Financials
NEM	Newmont Corp	▲ 12.7%	▲ 29.7%	Metals & Mining	Materials
EXE	Expand Energy Corp	▲ 12.6%	▲ 11.8%	Oil, Gas & Consumable Fuels	Energy
MKTX	MarketAxess Holdings Inc	▲ 12.2%	▼ -4.3%	Capital Markets	Financials
EA	Electronic Arts Inc	▲ 11.9%	▼ -1.2%	Entertainment	Communication Services
EQT	EQT Corp	▲ 10.9%	▲ 15.9%	Oil, Gas & Consumable Fuels	Energy

[View and Modify in YCharts →](#)

Worst-Performing S&P 500 Stocks of the Month

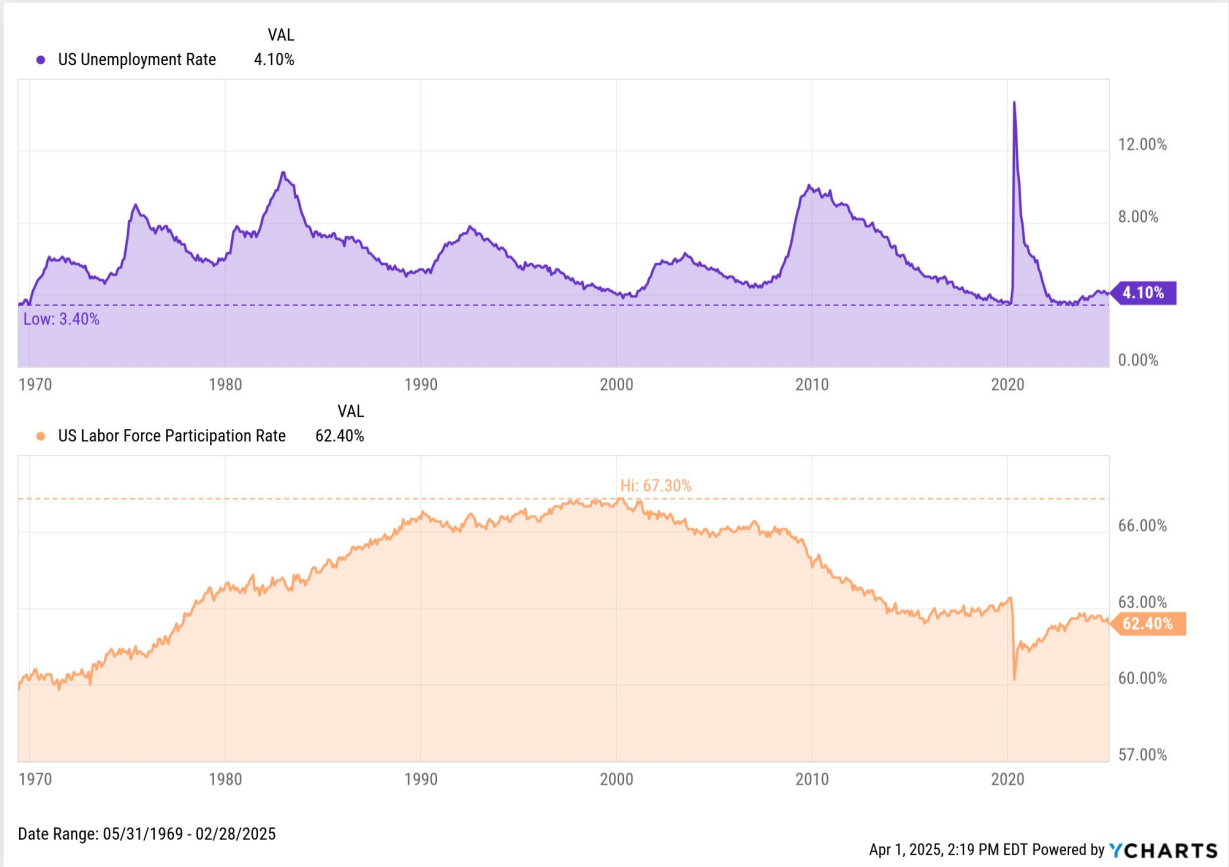
Ticker	Name	Mar Price Returns	2025 Price Returns	Industry	Sector
DAL	Delta Air Lines Inc	▼ -27.5%	▼ -27.9%	Passenger Airlines	Industrials
UAL	United Airlines Holdings Inc	▼ -26.4%	▼ -28.9%	Passenger Airlines	Industrials
TER	Teradyne Inc	▼ -24.8%	▼ -34.4%	Semiconductors & Semi Equipment	Information Technology
CZR	Caesars Entertainment Inc	▼ -24.7%	▼ -25.2%	Hotels, Restaurants & Leisure	Consumer Discretionary
DXCM	DexCom Inc	▼ -22.7%	▼ -12.2%	Health Care Equipment & Supplies	Health Care
LULU	Lululemon Athletica Inc	▼ -22.6%	▼ -26.0%	Textiles, Apparel & Luxury Goods	Consumer Discretionary
HPE	Hewlett Packard Enterprise Co	▼ -22.1%	▼ -27.7%	Tech Hardware, Storage & Peripherals	Information Technology
NKE	Nike Inc	▼ -20.1%	▼ -16.1%	Textiles, Apparel & Luxury Goods	Consumer Discretionary
DECK	Deckers Outdoor Corp	▼ -19.8%	▼ -44.9%	Textiles, Apparel & Luxury Goods	Consumer Discretionary
CEG	Constellation Energy Corp	▼ -19.5%	▼ -9.9%	Electric Utilities	Utilities

[View and Modify in YCharts →](#)

Economic Data

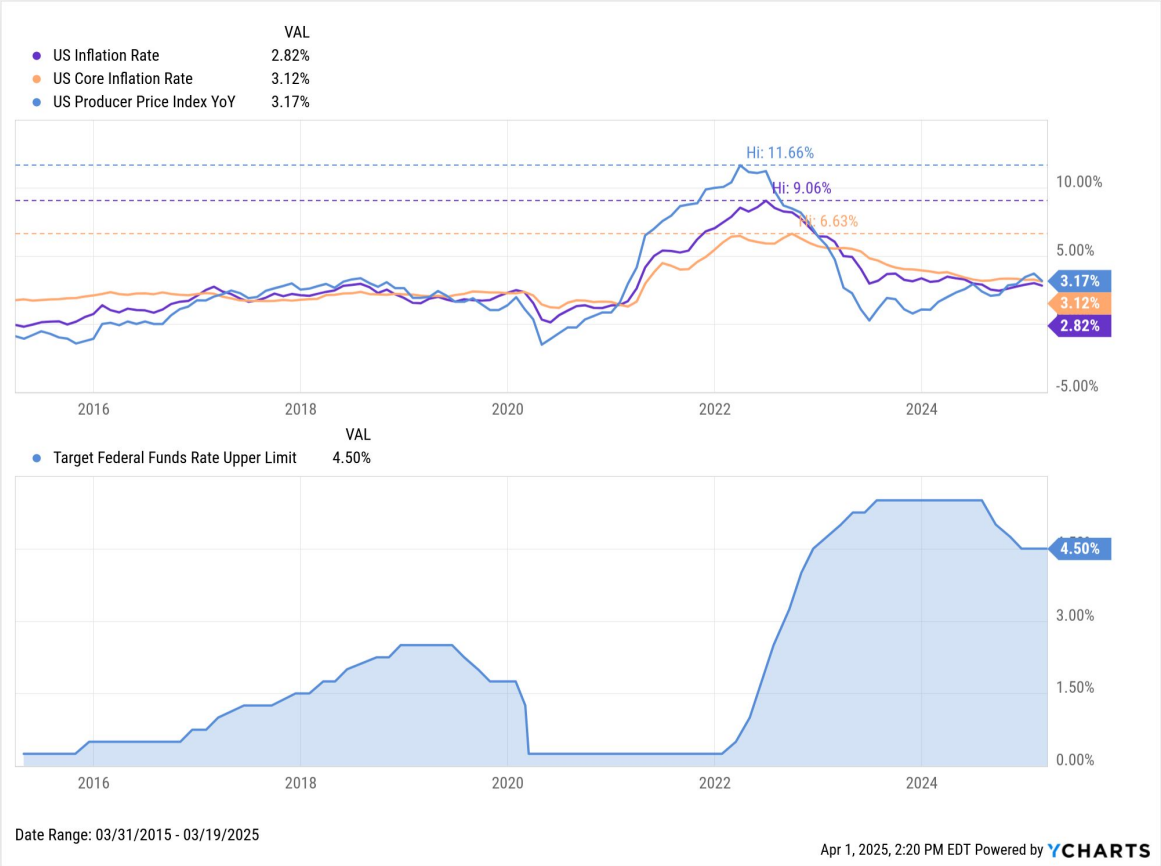
Select charts and data highlighting the major economic events of the past month

Employment



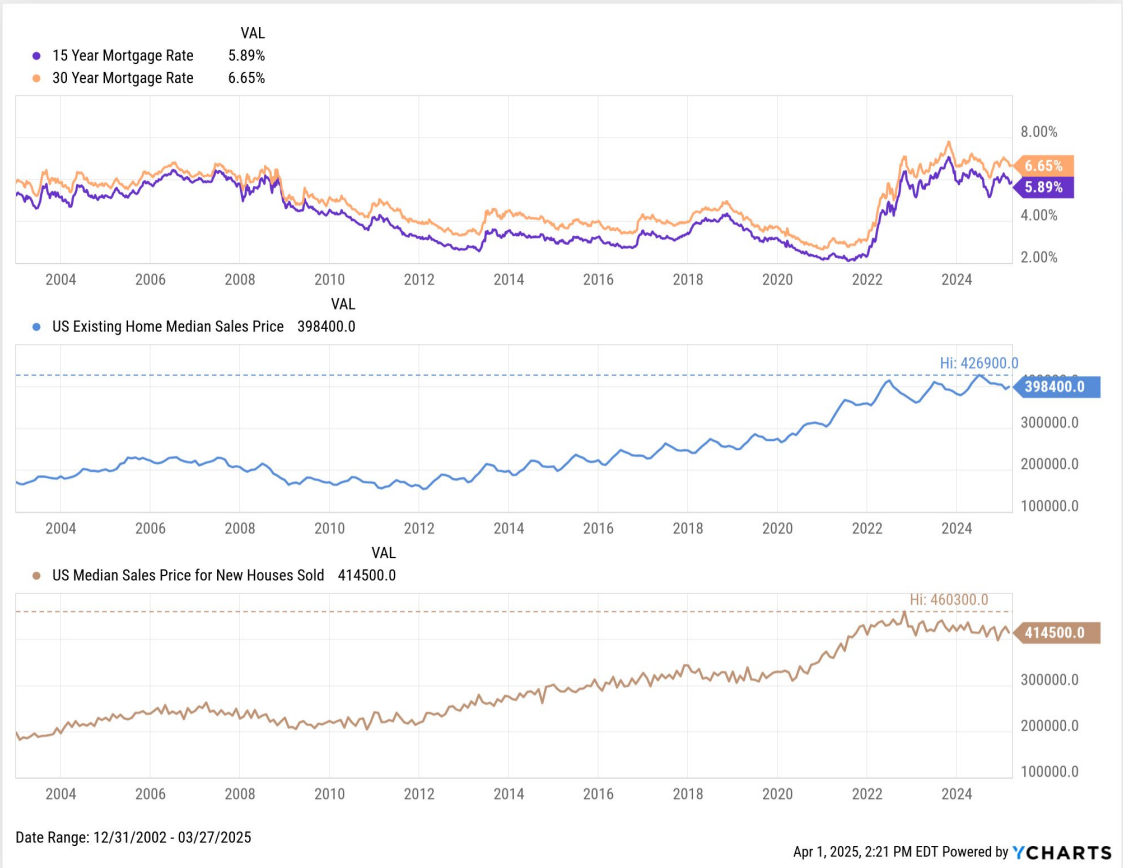
[View and Modify in YCharts](#) →

Inflation vs. Fed Funds Rate



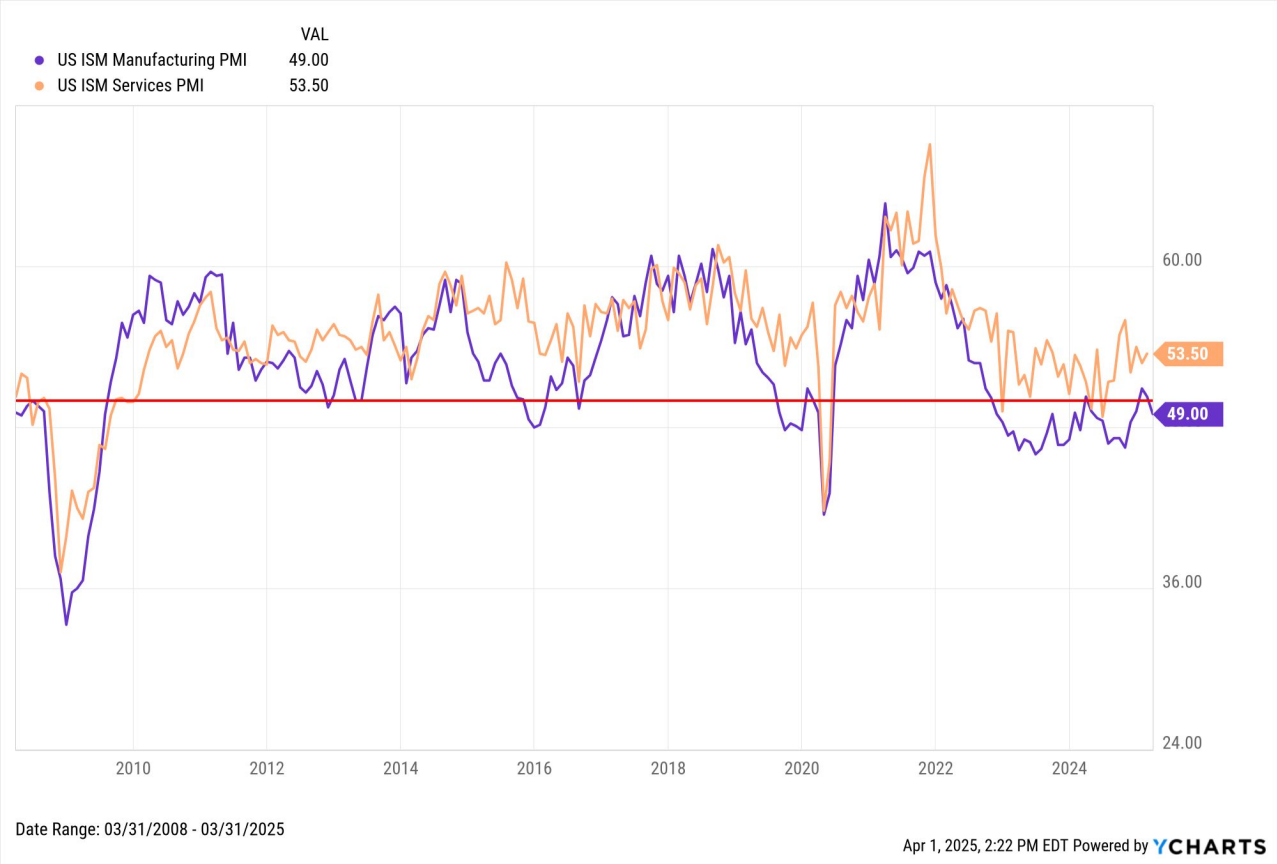
View and Modify in YCharts →

Housing Prices and Mortgage Rates



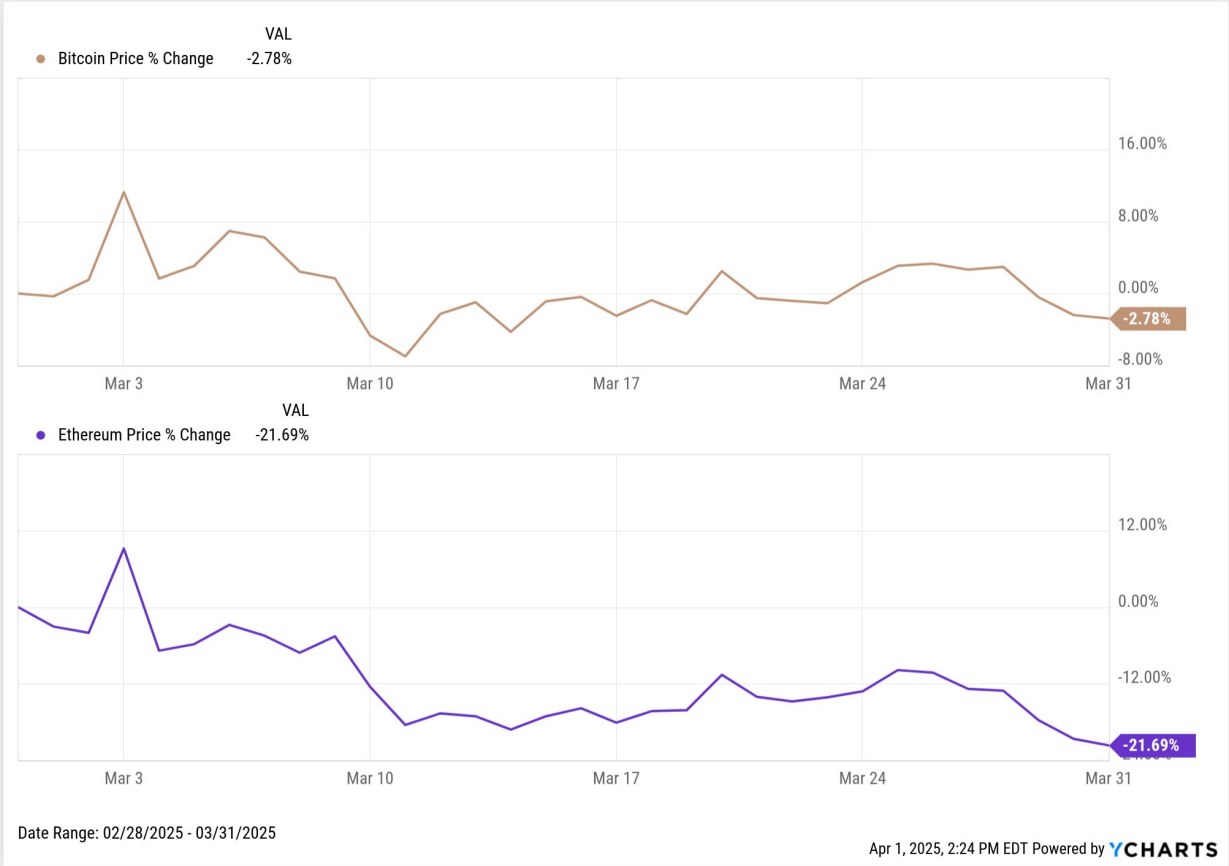
View and Modify in YCharts →

Manufacturing and Services



[View and Modify in YCharts](#) →

Gold Surges to New All-Time High while Cryptocurrency Slides



[View and Modify in YCharts →](#)

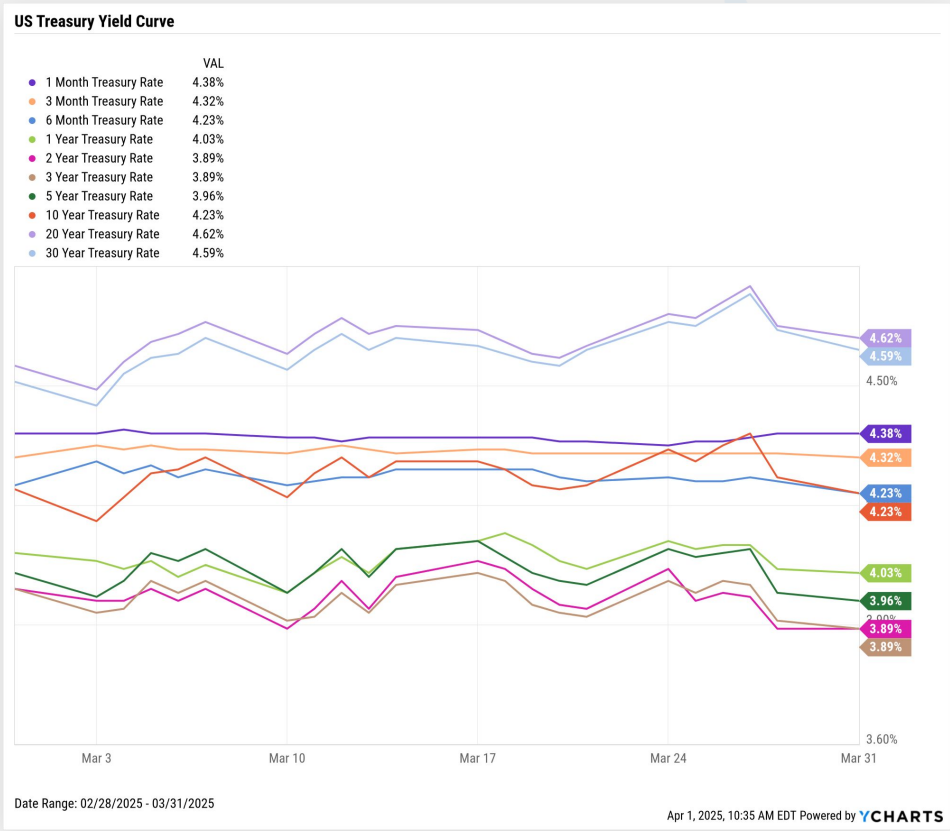
Fixed Income

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

US Treasury Yield Curve

Duration	Rate	MoM Δ
1-Month	4.38%	UnCh
3-Month	4.32%	Unch
6-Month	4.23%	▼ 2 bps
1-Year	4.03%	▼ 5 bps
2-Year	3.89%	▼ 10 bps
3-Year	3.89%	▼ 10 bps
5-Year	3.96%	▼ 7 bps
10-Year	4.23%	▼ 1 bp
20-Year	4.62%	▲ 7 bps
30-Year	4.59%	▲ 8 bps

[View and Modify in YCharts →](#)

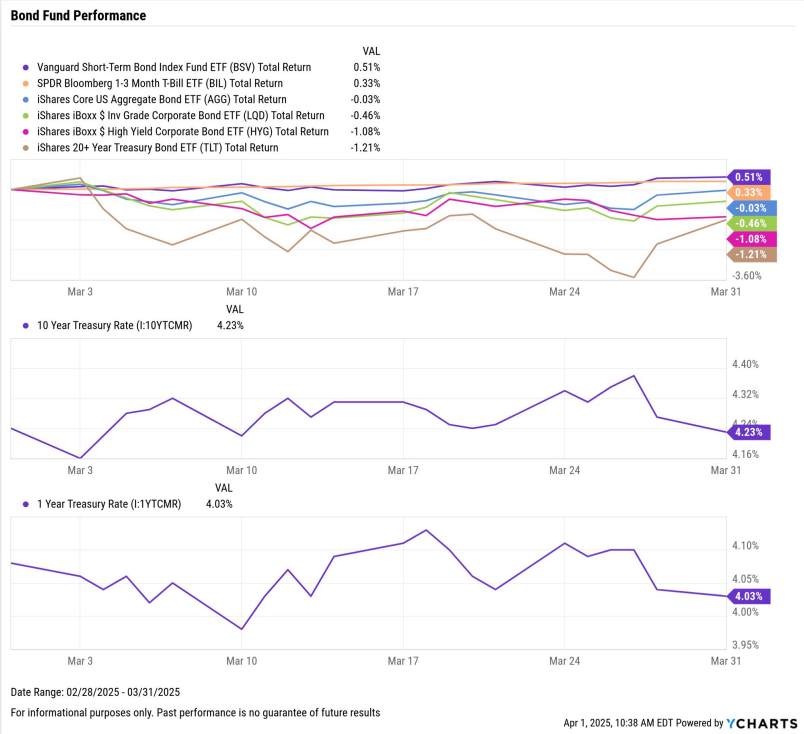


[View and Modify in YCharts →](#)

Bond Fund Performance

March 2025:

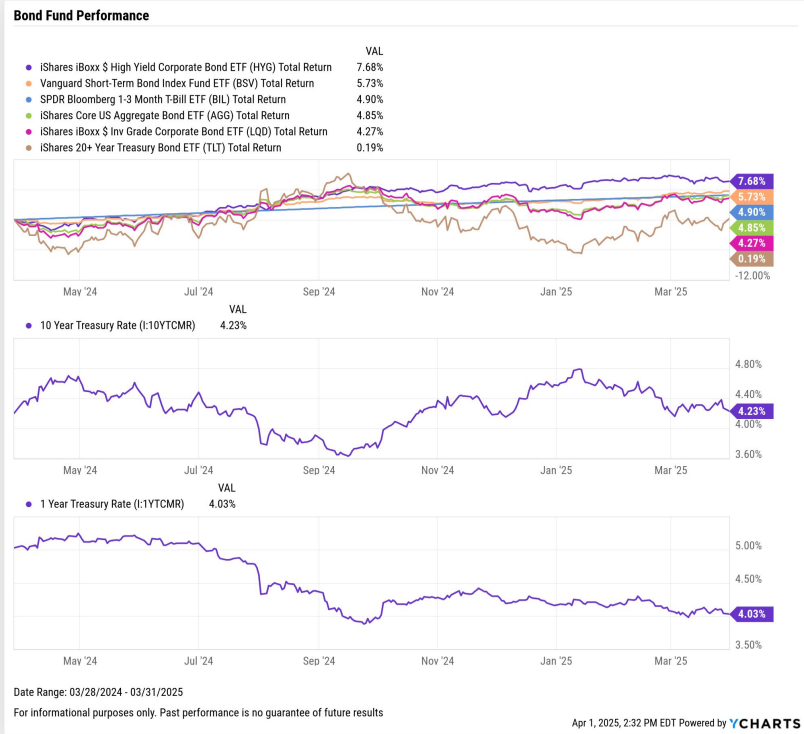
Muted yield curve activity in March; TLT down 1.2%



[View and Modify in YCharts →](#)

Trailing Twelve Months (TTM):

TLT virtually flat over the last twelve months



[View and Modify in YCharts →](#)



For more information or to start a **free trial**,
please visit **www.ycharts.com**

YCharts is not registered with the U.S. Securities and Exchange Commission (or with the securities regulatory authority or body of any state or any other jurisdiction) as an investment adviser, broker-dealer or in any other capacity, and does not purport to provide investment advice or make investment recommendations by or through the Content found on the Site or otherwise. The Site and the Content are provided for the sole purpose of enabling you to conduct investment research. Other uses of the Site and the Content are expressly prohibited. Full disclosure: <https://ycharts.com/about/disclosure>