

YCHARTS

Monthly Market Wrap

May 2025

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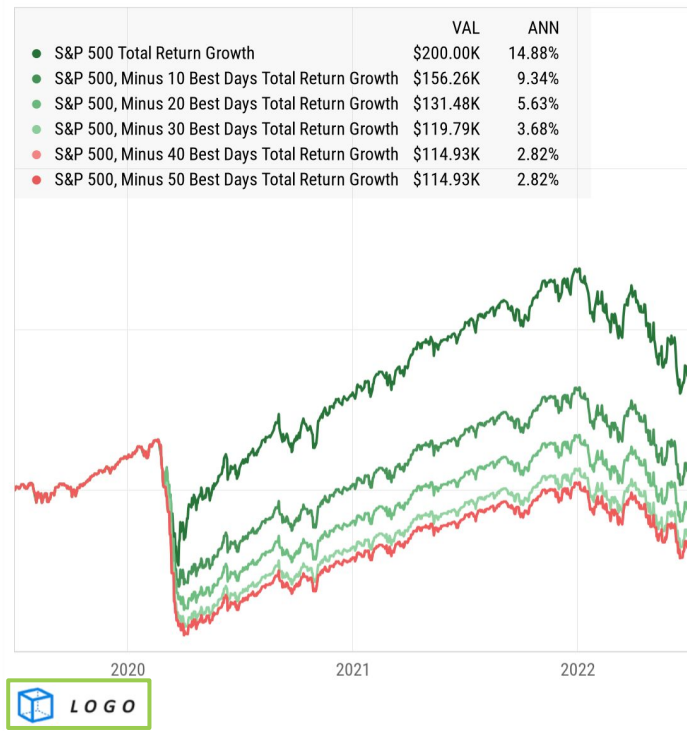
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Released June 3, 2025

The Effect of Missing the Best Market Days



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Asset Class Performance

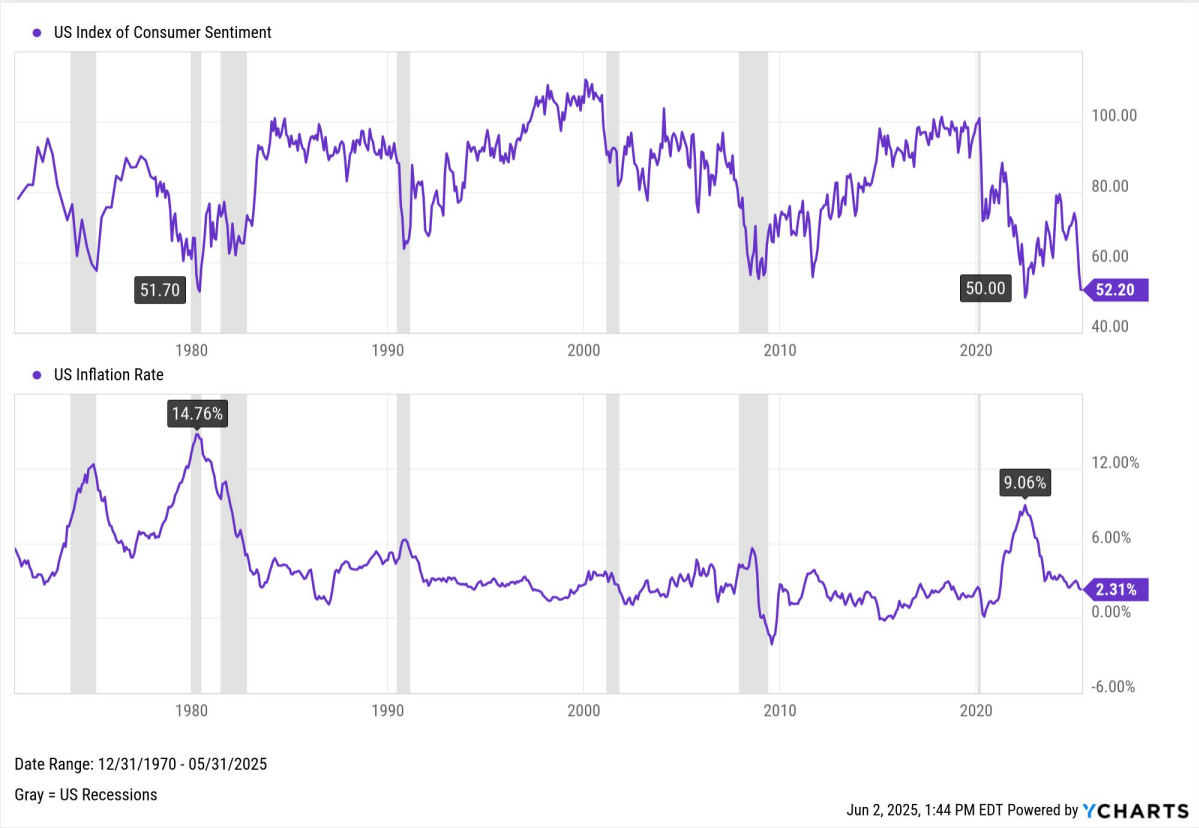
YTD Total Return	1 month Total Return	3 month Total Return	6 month Total Return	1 year Total Return	3 year Total Return	5 year Total Return	10 year Total Return
World exUSA 16.7%	US Growth 8.8%	World exUSA 9.2%	World exUSA 13.6%	US Growth 17.6%	US Growth 19.8%	Commodities 17.8%	US Growth 16.1%
Emerging Markets 8.9%	S&P 500 6.3%	Emerging Markets 6.4%	Emerging Markets 8.8%	World exUSA 14.7%	S&P 500 14.4%	US Growth 17.7%	S&P 500 12.9%
US Treasuries 2.5%	US Small 5.3%	US Growth 1.4%	US Treasuries 0.9%	Emerging Markets 13.6%	World exUSA 11.7%	S&P 500 15.9%	US Value 8.6%
US Value 2.5%	World exUSA 4.8%	US Treasuries -0.2%	Aggregate Bonds 0.8%	S&P 500 13.5%	US Value 8.2%	US Value 13.0%	World exUSA 6.7%
US Real Estate 2.5%	Emerging Markets 4.3%	Aggregate Bonds -0.3%	Commodities 0.8%	US Real Estate 12.9%	Emerging Markets 5.6%	World exUSA 12.3%	US Small 6.6%
Aggregate Bonds 2.4%	US Value 3.5%	S&P 500 -0.4%	US Growth 0.6%	US Value 8.9%	US Small 5.0%	US Small 9.6%	US Real Estate 6.0%
S&P 500 1.1%	Commodities 1.6%	Muni Bonds -2.4%	S&P 500 -1.3%	Aggregate Bonds 5.5%	Muni Bonds 1.7%	Emerging Markets 7.5%	Emerging Markets 4.3%
US Growth -0.3%	US Real Estate 0.9%	US Value -2.4%	Muni Bonds -2.4%	US Treasuries 5.0%	US Real Estate 1.7%	US Real Estate 7.2%	Muni Bonds 2.1%
Muni Bonds -1.0%	Muni Bonds 0.1%	US Real Estate -3.4%	US Value -4.5%	Muni Bonds 2.0%	Aggregate Bonds 1.5%	Muni Bonds 0.5%	Aggregate Bonds 1.5%
Commodities -2.4%	Aggregate Bonds -0.7%	US Small -4.1%	US Real Estate -5.9%	US Small 1.2%	US Treasuries 0.8%	Aggregate Bonds -0.9%	Commodities 1.0%
US Small -6.8%	US Treasuries -1.0%	Commodities -4.3%	US Small -14.5%	Commodities -2.7%	Commodities -4.4%	US Treasuries -1.8%	US Treasuries 1.0%

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

*Data as of 5/31/2025

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! Consumer Sentiment Index Plummets to Third-Lowest Level



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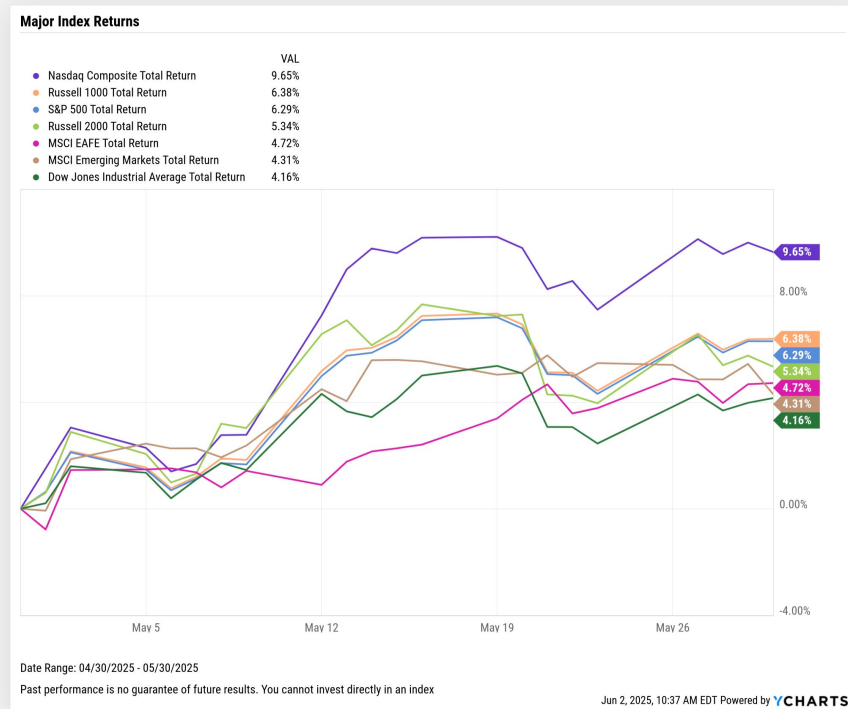
Equity Performance

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

Key Stock Market Index Performance

May 2025:

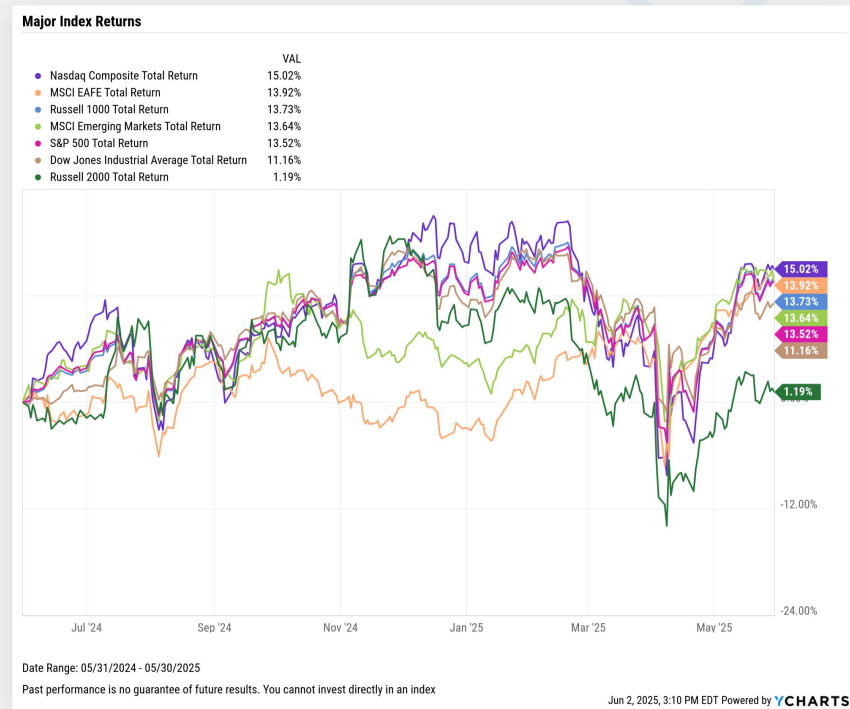
Equities rally, Nasdaq Composite up almost 10% in May



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Trailing Twelve Months (TTM):

Nasdaq best performing index TTM, Russell 2K lags

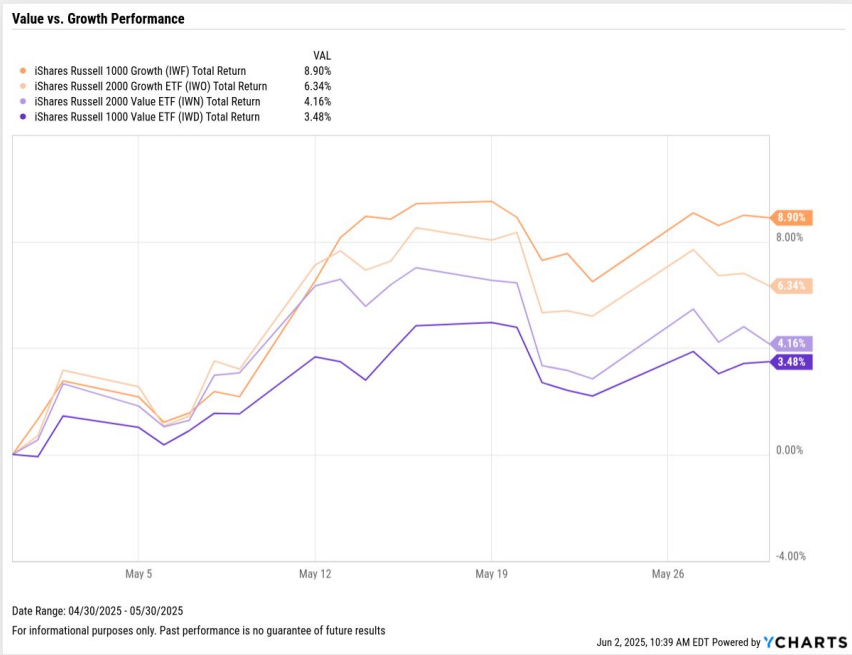


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Value vs. Growth Performance

May 2025:

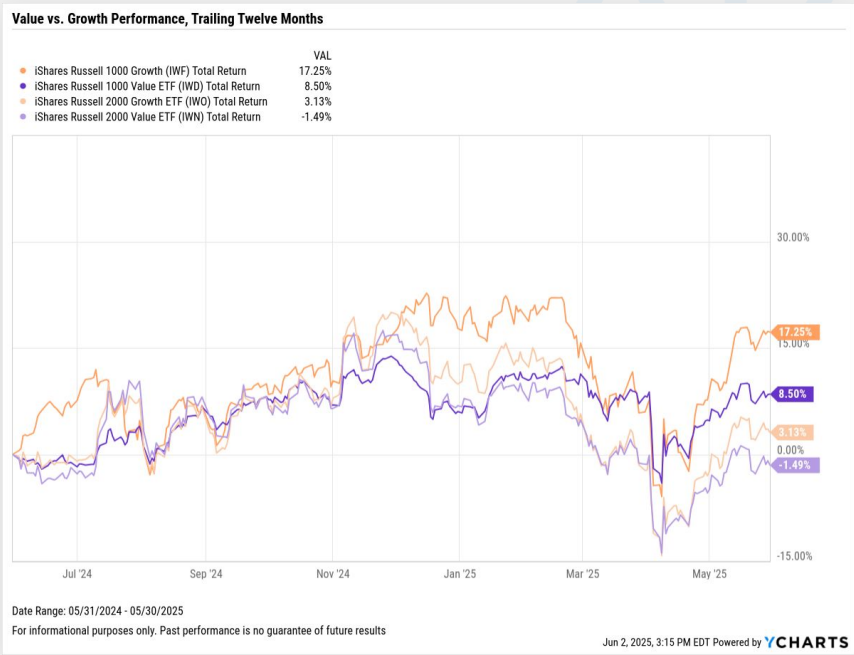
Large-cap Growth leads for second straight month, all other equity styles positive as well



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Trailing Twelve Months (TTM):

Large-cap styles outpace Small-caps, Small-cap Value down 1.5% TTM



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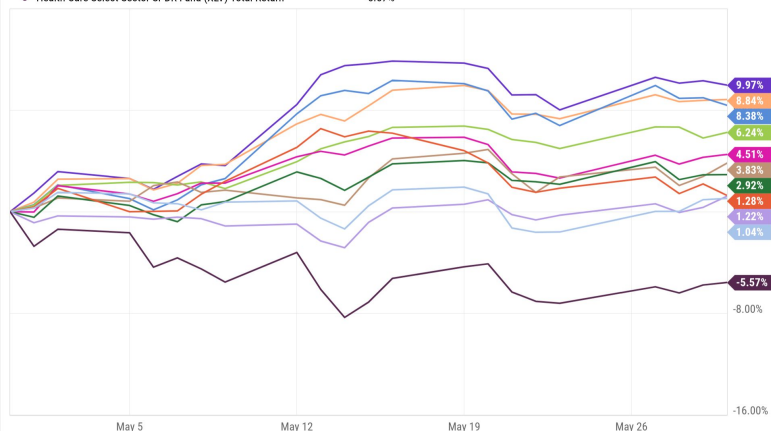
Domestic Sector Performance

May 2025:

Tech leads with 10% gain, Health Care the sole laggard

Sector Movement

	VAL
Technology Select Sector SPDR Fund (XLK) Total Return	9.97%
Industrial Select Sector SPDR Fund (XLI) Total Return	8.84%
Consumer Discretionary Select Sector SPDR Fund (XLY) Total Return	8.38%
Communication Services Select Sector SPDR Fund (XLC) Total Return	6.24%
Financial Select Sector SPDR Fund (XLF) Total Return	4.51%
Utilities Select Sector SPDR Fund (XLU) Total Return	3.83%
Materials Select Sector SPDR Fund (XLB) Total Return	2.92%
Energy Select Sector SPDR Fund (XLE) Total Return	1.28%
Consumer Staples Select Sector SPDR Fund (XLP) Total Return	1.22%
Real Estate Select Sector SPDR Fund (XLRE) Total Return	1.04%
Health Care Select Sector SPDR Fund (XLV) Total Return	-5.57%



Date Range: 04/30/2025 - 05/30/2025

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

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Trailing Twelve Months (TTM):

Financials, Comm Services, Discretionary up over 22.5%

Sector Movement, Trailing Twelve Months

	VAL
Financial Select Sector SPDR Fund (XLF) Total Return	24.27%
Communication Services Select Sector SPDR Fund (XLC) Total Return	23.15%
Consumer Discretionary Select Sector SPDR Fund (XLY) Total Return	22.56%
Industrial Select Sector SPDR Fund (XLI) Total Return	17.34%
Utilities Select Sector SPDR Fund (XLU) Total Return	16.07%
Real Estate Select Sector SPDR Fund (XLRE) Total Return	13.45%
Technology Select Sector SPDR Fund (XLK) Total Return	10.64%
Consumer Staples Select Sector SPDR Fund (XLP) Total Return	9.87%
Materials Select Sector SPDR Fund (XLB) Total Return	-3.86%
Health Care Select Sector SPDR Fund (XLV) Total Return	-6.22%
Energy Select Sector SPDR Fund (XLE) Total Return	-9.68%



Date Range: 05/31/2024 - 05/30/2025

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Best-Performing S&P 500 Stocks of the Month

Ticker	Name	May Price Returns	2025 Price Returns	Industry	Sector
NRG	NRG Energy Inc	▲ 42.3%	▲ 72.8%	Electric Utilities	Utilities
CEG	Constellation Energy Corp	▲ 37.0%	▲ 36.9%	Electric Utilities	Utilities
STX	Seagate Technology Holdings	▲ 29.6%	▲ 36.6%	Tech Hardware, Storage & Peripherals	Information Technology
PODD	Insulet Corp	▲ 28.8%	▲ 24.5%	Health Care Equipment & Supplies	Health Care
GEV	GE Vernova Inc	▲ 27.5%	▲ 43.8%	Electrical Equipment	Industrials
ROK	Rockwell Automation Inc	▲ 27.4%	▲ 10.4%	Electrical Equipment	Industrials
CCL	Carnival Corp	▲ 26.6%	▼ -6.8%	Hotels, Restaurants & Leisure	Consumer Discretionary
MCHP	Microchip Technology Inc	▲ 26.0%	▲ 1.2%	Semiconductors & Equipment	Information Technology
AVGO	Broadcom Inc	▲ 25.8%	▲ 4.4%	Semiconductors & Equipment	Information Technology
FSLR	First Solar Inc	▲ 25.6%	▼ -10.3%	Semiconductors & Equipment	Information Technology

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Worst-Performing S&P 500 Stocks of the Month

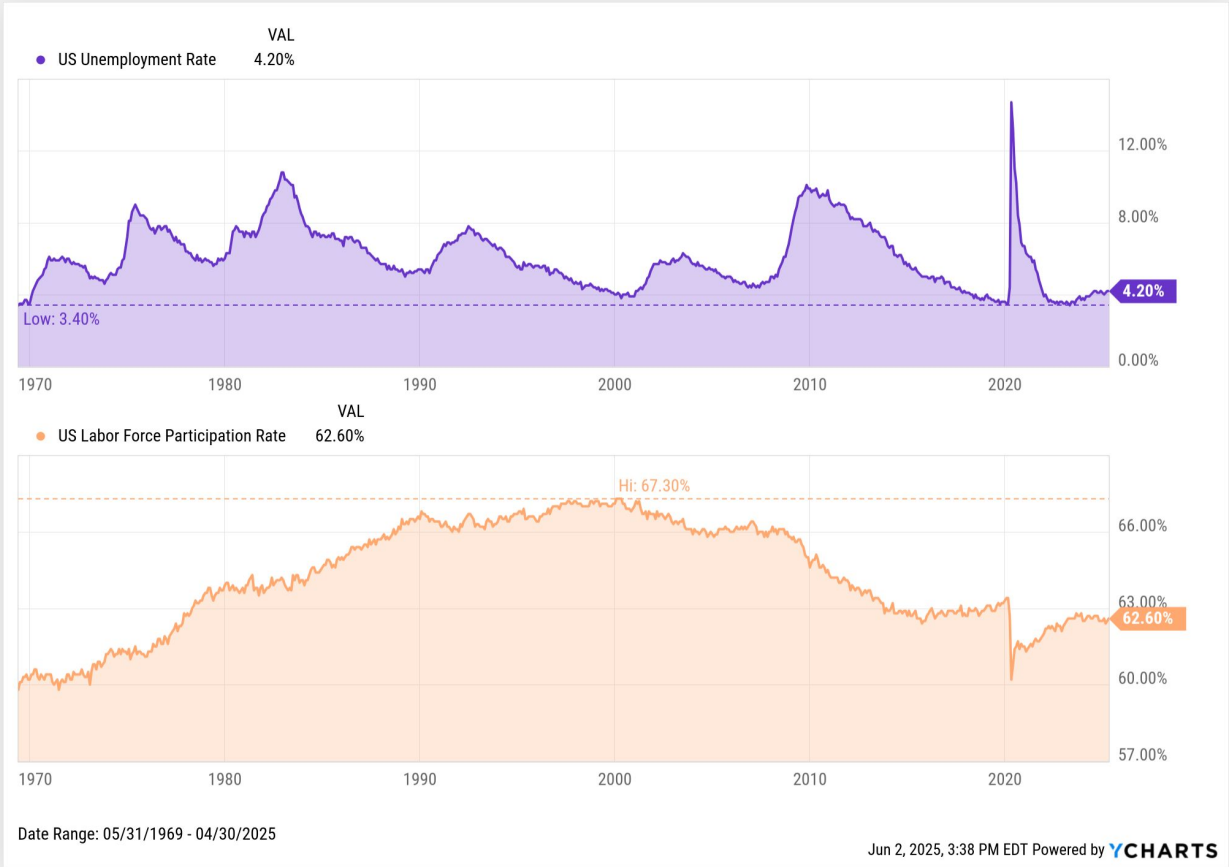
Ticker	Name	May Price Returns	2025 Price Returns	Industry	Sector
UNH	UnitedHealth Group Inc	▼ -26.6%	▼ -40.3%	Health Care Providers & Services	Health Care
REGN	Regeneron Pharmaceuticals	▼ -18.1%	▼ -31.2%	Biotechnology	Health Care
LLY	Eli Lilly and Co	▼ -17.9%	▼ -4.4%	Pharmaceuticals	Health Care
BDX	Becton Dickinson & Co	▼ -16.7%	▼ -23.9%	Health Care Equipment & Supplies	Health Care
COO	The Cooper Companies Inc	▼ -16.4%	▼ -25.7%	Health Care Equipment & Supplies	Health Care
CPRT	Copart Inc	▼ -15.6%	▼ -10.3%	Commercial Services & Supplies	Industrials
TPL	Texas Pacific Land Corp	▼ -13.6%	▲ 0.7%	Oil, Gas & Consumable Fuels	Energy
VRTX	Vertex Pharmaceuticals Inc	▼ -13.2%	▲ 9.8%	Biotechnology	Health Care
FICO	Fair Isaac Corp	▼ -13.2%	▼ -13.3%	Software	Information Technology
FI	Fiserv Inc	▼ -11.8%	▼ -20.8%	Financial Services	Financials

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Economic Data

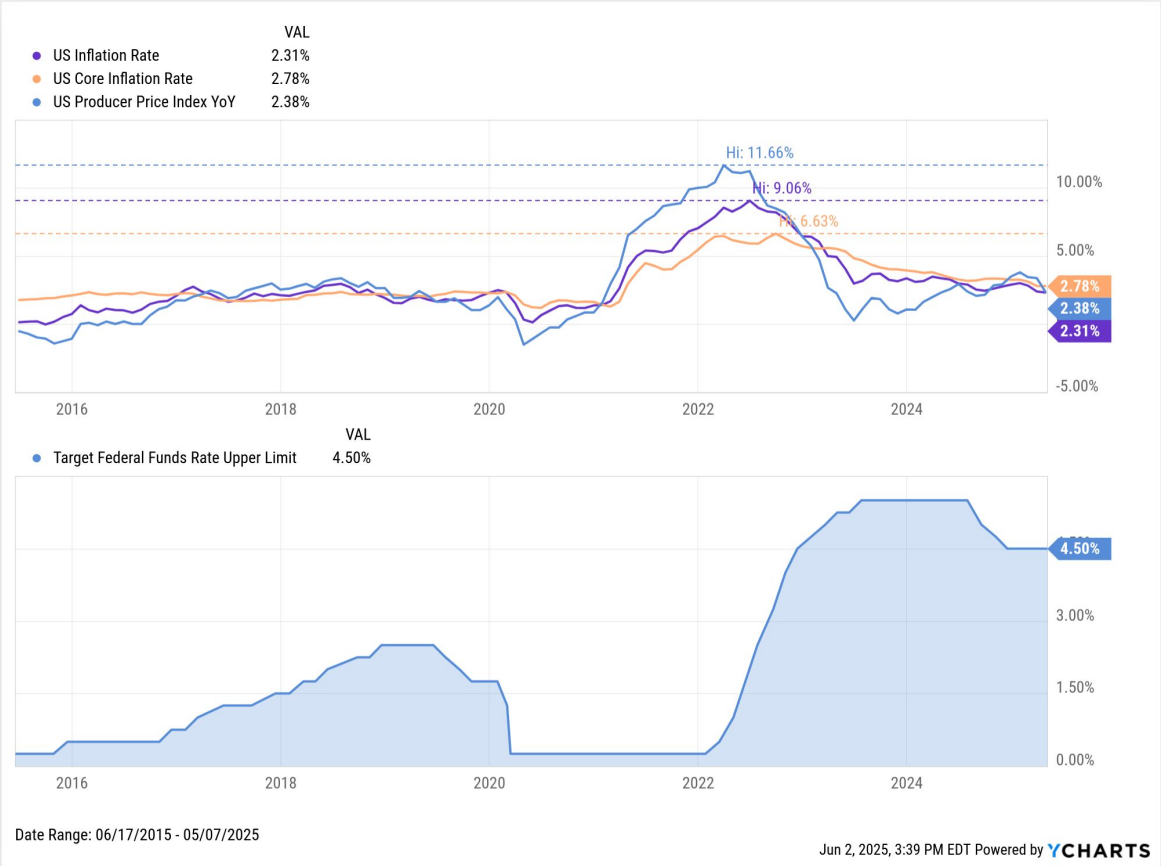
Select charts and data highlighting the major economic events of the past month

Employment



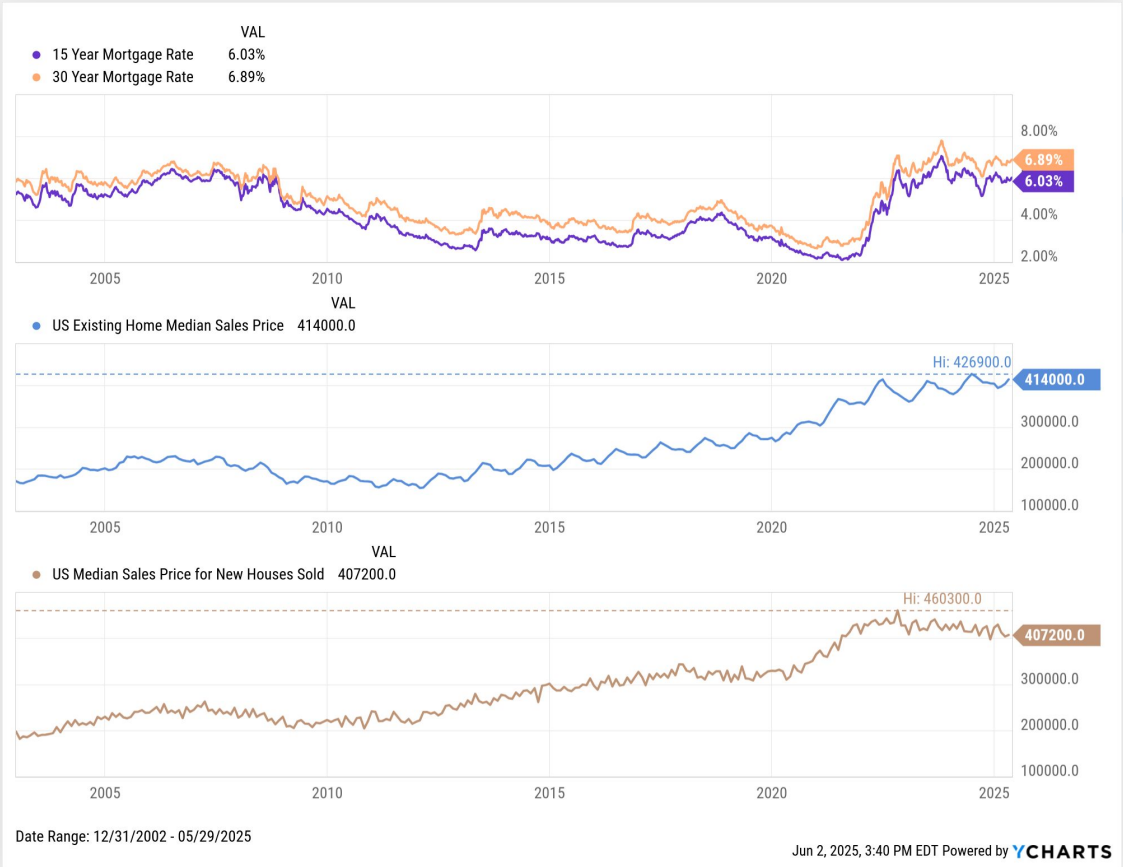
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Inflation vs. Fed Funds Rate



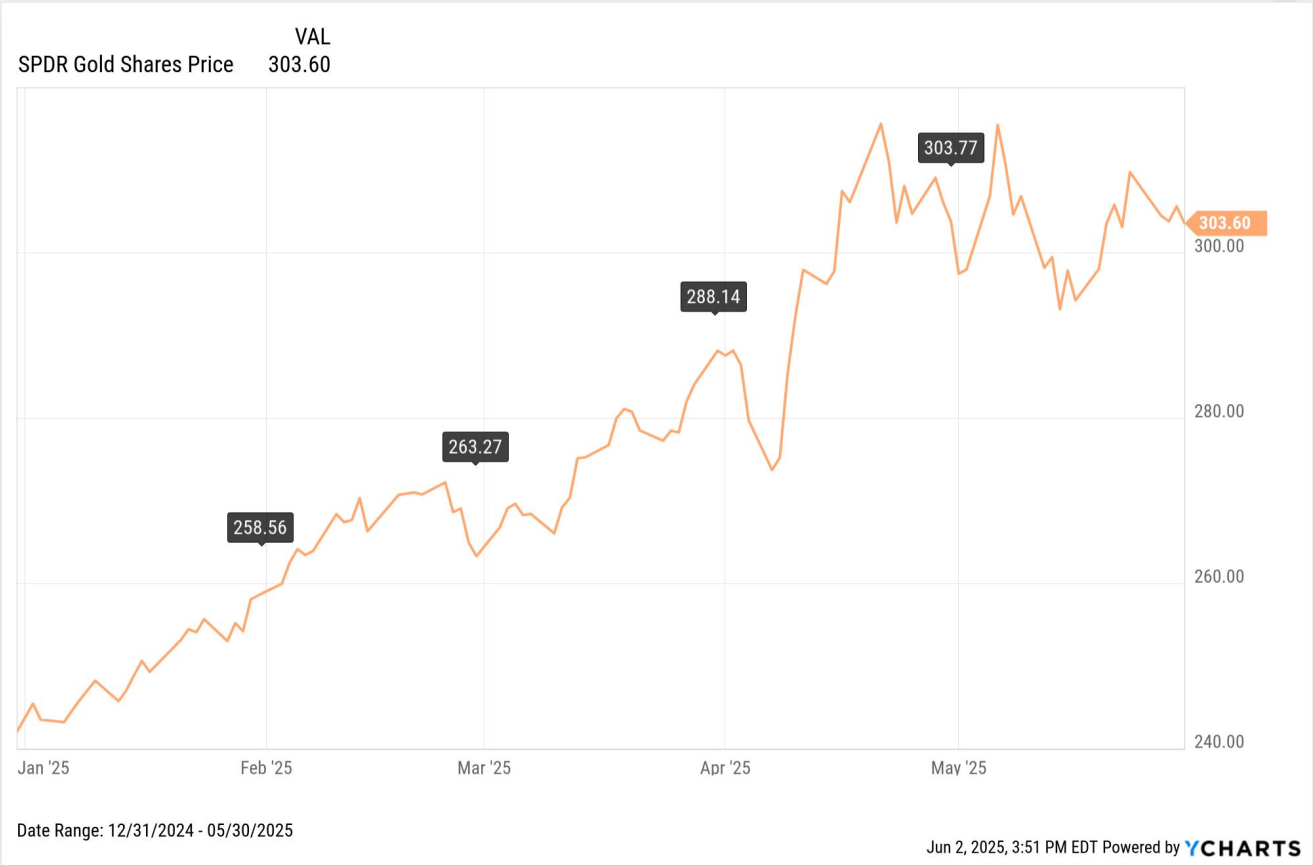
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Housing Prices and Mortgage Rates



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Gold Takes a Breather from 4-Month Rally



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Cryptocurrencies Make Big Gains



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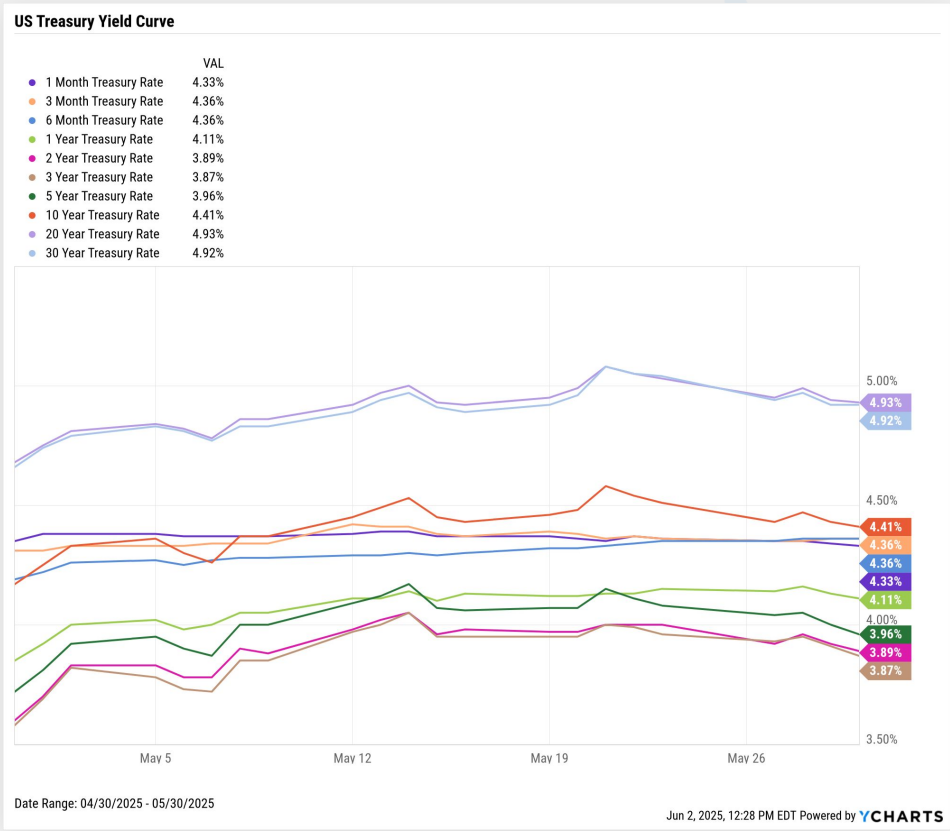
Fixed Income

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

US Treasury Yield Curve

Duration	Rate	MoM Δ
1-Month	4.33%	▼ 2 bps
3-Month	4.36%	▲ 5 bps
6-Month	4.36%	▲ 17 bps
1-Year	4.11%	▲ 26 bps
2-Year	3.89%	▲ 29 bps
3-Year	3.87%	▲ 29 bps
5-Year	3.96%	▲ 24 bps
10-Year	4.41%	▲ 24 bps
20-Year	4.93%	▲ 25 bps
30-Year	4.92%	▲ 26 bps

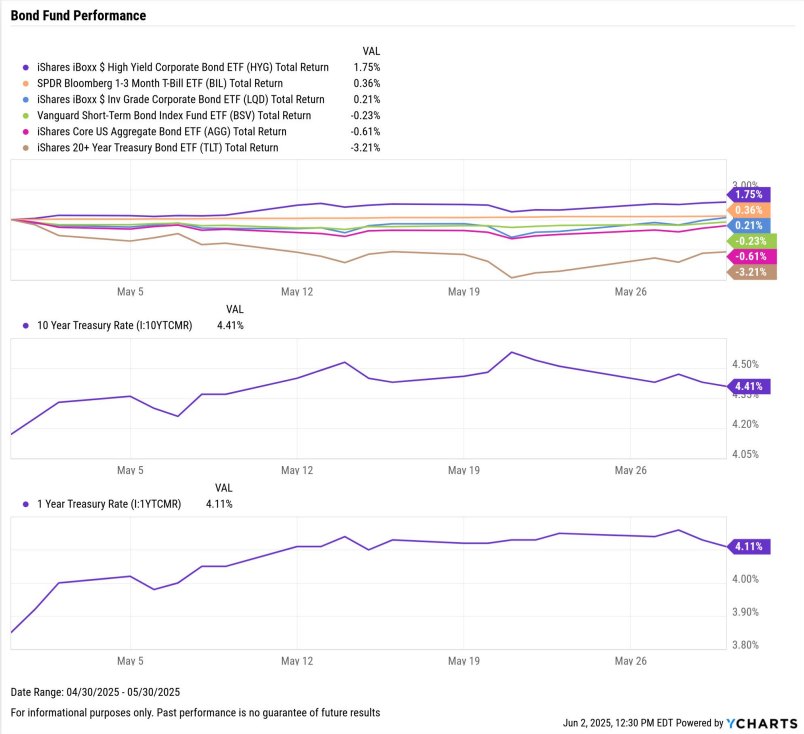
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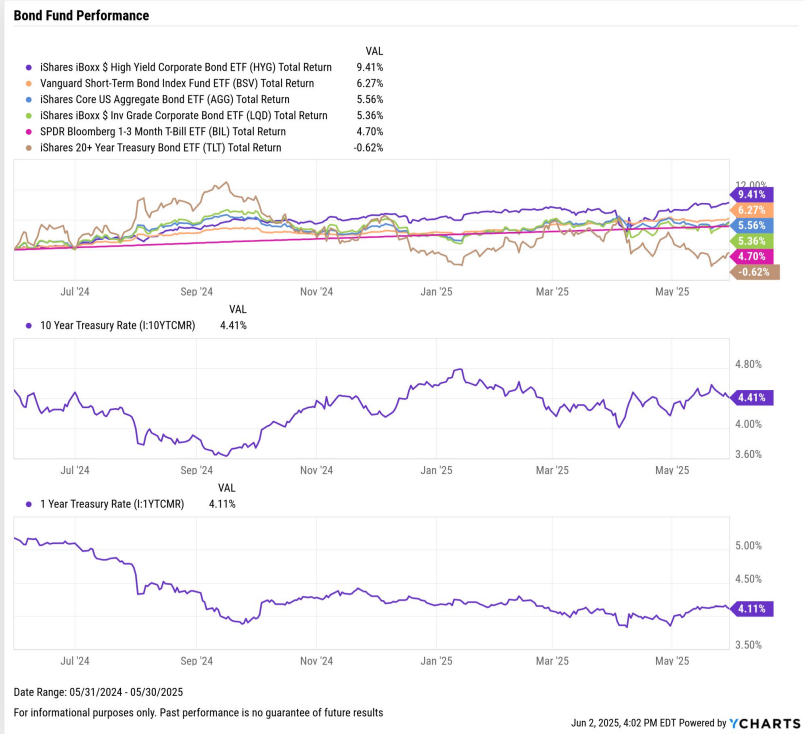
Bond Fund Performance

May 2025:
20- and 30-year yield increases push TLT down 3.2%



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Trailing Twelve Months (TTM):
Yield curve steepening causes TLT to go negative TTM



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