

Economic Update

A Closer Look at Q1 2025 Data

Released April 2025

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Market Data

Charts and Tables Highlighting the Performance of Stock Market Indicators and Asset Classes over the Latest Quarter

Key Stock Market Index Performance



US Markets	Q1 2025 Return
Dow Jones Industrial Average Total Return	-0.87%
S&P 500 Total Return	-4.27%
Nasdaq Composite Total Return	-10.26%

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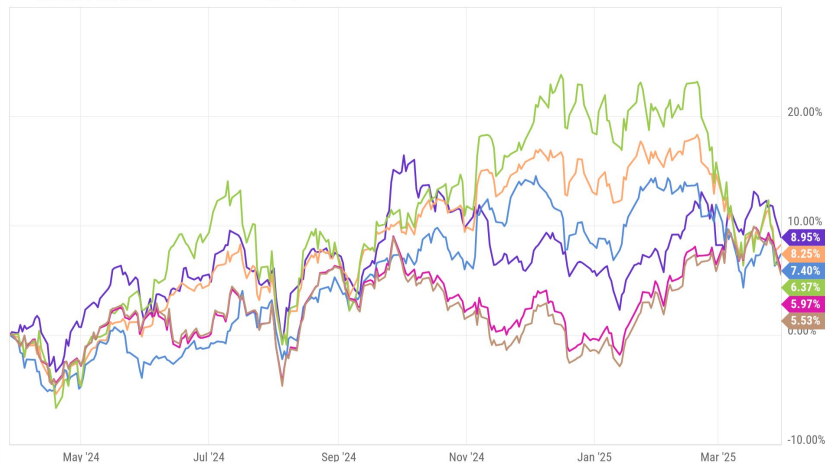
Global Markets	Q1 2025 Return
MSCI World Ex USA Total Return	6.35%
MSCI Emerging Markets Total Return	3.01%
MSCI EAFE Total Return	7.01%

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Key Stock Market Index Performance (cont.)

TTM Index Performance

	VAL
MSCI Emerging Markets Total Return	8.95%
S&P 500 Total Return	8.25%
Dow Jones Industrial Average Total Return	7.40%
Nasdaq Composite Total Return	6.37%
MSCI World Ex USA Total Return	5.97%
MSCI EAFE Total Return	5.53%



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

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TTM Index 5Y Drawdowns

	VAL
MSCI Emerging Markets Total Return % Off High	-14.06%
S&P 500 Total Return % Off High	-8.51%
Dow Jones Industrial Average Total Return % Off High	-6.24%
Nasdaq Composite Total Return % Off High	-14.08%
MSCI World Ex USA Total Return % Off High	-3.52%
MSCI EAFE Total Return % Off High	-4.00%



Date Range: 03/31/2020 - 03/31/2025

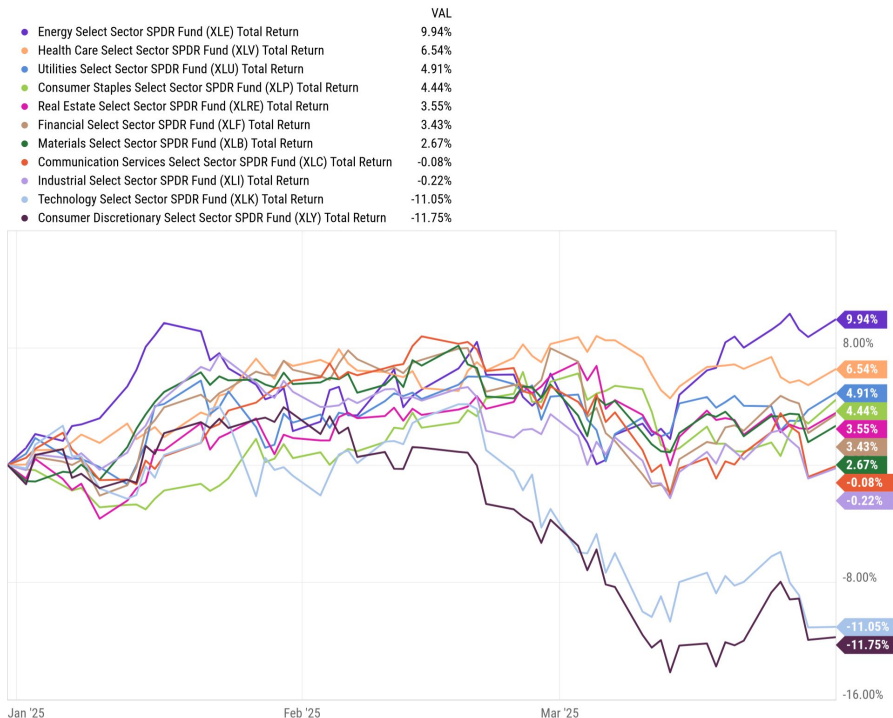
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US Stock Sector Performance

Sector Performance, Q1 2025



Date Range: 12/31/2024 - 03/31/2025

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Sensitive Sectors

Q1 2025
Return

Communication Services Select Sector SPDR® ETF	-0.08%
Energy Select Sector SPDR® ETF	9.94%
Industrial Select Sector SPDR® ETF	-0.22%
Technology Select SPDR® ETF	-11.05%

Defensive Sectors

Q1 2025
Return

Consumer Staples Select Sector SPDR® ETF	4.44%
Health Care Select Sector SPDR® ETF	6.54%
Utilities Select Sector SPDR® ETF	4.91%

Cyclical Sectors

Q1 2025
Return

Consumer Discretionary Select SPDR® ETF	-11.75%
Financial Select Sector SPDR® ETF	3.43%
Materials Select Sector SPDR® ETF	2.67%
Real Estate Select Sector SPDR® ETF	3.55%

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Asset Class Performance – Trailing Periods

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%

Asset	Index 1
S&P 500	S&P 500 Total Return
US Growth	Russell 1000 Growth Total Return
US Value	Russell 1000 Value Total Return
US Small	Russell 2000 Total Return
World exUSA	MSCI World Ex USA Total Return
Emerging Markets	MSCI Emerging Markets Total Return
US Real Estate	Dow Jones US Real Estate Index Total Return
Aggregate Bonds	Bloomberg US Aggregate
Muni Bonds	Bloomberg Municipal Bond
US Treasuries	Bloomberg US Treasury
Commodities	S&P GSCI Total Return

3Y, 5Y, 10Y total returns annualized

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*Data as of 3/31/2025

Asset Class Performance – Quarter by Quarter

3/31/2025 Qtr Return	12/31/2024 Qtr Return	9/30/2024 Qtr Return	6/30/2024 Qtr Return	3/31/2024 Qtr Return	12/31/2023 Qtr Return	9/30/2023 Qtr Return	6/30/2023 Qtr Return	3/31/2023 Qtr Return	12/31/2022 Qtr Return	9/30/2022 Qtr Return	6/30/2022 Qtr Return	3/31/2022 Qtr Return	12/31/2021 Qtr Return	9/30/2021 Qtr Return
World exUSA 6.3%	US Growth 7.1%	US Real Estate 17.1%	US Growth 8.3%	US Growth 11.4%	US Real Estate 18.0%	Commodities 16.0%	US Growth 12.8%	US Growth 14.4%	World exUSA 16.3%	US Small -2.2%	Commodities 2.0%	Commodities 33.1%	US Real Estate 14.6%	Commodities 5.2%
Commodities 4.9%	Commodities 3.8%	US Value 9.4%	Emerging Markets 5.1%	S&P 500 10.6%	US Growth 14.2%	Emerging Markets -2.8%	S&P 500 8.7%	World exUSA 8.2%	US Value 12.4%	Muni Bonds -3.5%	Muni Bonds -2.9%	US Value -0.7%	US Growth 11.6%	US Growth 1.2%
US Real Estate 3.5%	S&P 500 2.4%	US Small 9.3%	S&P 500 4.3%	Commodities 10.4%	US Small 14.0%	US Treasuries -3.1%	US Small 5.2%	S&P 500 7.5%	Emerging Markets 9.8%	US Growth -3.6%	US Treasuries -3.8%	S&P 500 -4.6%	S&P 500 11.0%	US Real Estate 0.9%
Emerging Markets 3.0%	US Small 0.3%	Emerging Markets 8.9%	Commodities 0.7%	US Value 9.0%	S&P 500 11.7%	US Growth -3.1%	US Value 4.1%	Emerging Markets 4.0%	S&P 500 7.6%	US Treasuries -4.3%	Aggregate Bonds -4.7%	World exUSA -4.7%	US Value 7.8%	S&P 500 0.6%
US Treasuries 2.9%	Muni Bonds -1.2%	World exUSA 7.8%	US Treasuries 0.1%	World exUSA 5.7%	World exUSA 10.6%	US Value -3.2%	World exUSA 3.3%	US Treasuries 3.0%	US Small 6.2%	Aggregate Bonds -4.8%	Emerging Markets -11.3%	US Treasuries -5.6%	World exUSA 3.2%	US Treasuries 0.1%
Aggregate Bonds 2.8%	US Value -2.0%	S&P 500 5.9%	Aggregate Bonds 0.1%	US Small 5.2%	US Value 9.5%	Aggregate Bonds -3.2%	US Real Estate 2.4%	Aggregate Bonds 3.0%	US Real Estate 4.4%	S&P 500 -4.9%	US Value -12.2%	Aggregate Bonds -5.9%	US Small 2.1%	Aggregate Bonds 0.1%
US Value 2.1%	Aggregate Bonds -3.1%	Aggregate Bonds 5.2%	Muni Bonds 0.0%	Emerging Markets 2.4%	Emerging Markets 7.9%	S&P 500 -3.3%	Emerging Markets 1.0%	Muni Bonds 2.8%	Muni Bonds 4.1%	US Value -5.6%	World exUSA -14.4%	Muni Bonds -6.2%	Commodities 1.5%	Muni Bonds -0.3%
Muni Bonds -0.2%	US Treasuries -3.1%	US Treasuries 4.7%	World exUSA -0.4%	Muni Bonds -0.4%	Muni Bonds 7.9%	Muni Bonds -3.9%	Muni Bonds -0.1%	US Small 2.7%	Commodities 3.4%	World exUSA -9.1%	US Real Estate -14.5%	US Real Estate -6.5%	Muni Bonds 0.7%	World exUSA -0.6%
S&P 500 -4.3%	World exUSA -7.4%	US Growth 3.2%	US Real Estate -1.7%	Aggregate Bonds -0.8%	Aggregate Bonds 6.8%	World exUSA -4.0%	Aggregate Bonds -0.8%	US Real Estate 1.6%	US Growth 2.2%	Commodities -10.3%	S&P 500 -16.1%	Emerging Markets -6.9%	US Treasuries 0.2%	US Value -0.8%
US Small -9.5%	US Real Estate -7.8%	Muni Bonds 2.7%	US Value -2.2%	US Treasuries -1.0%	US Treasuries 5.7%	US Small -5.1%	US Treasuries -1.4%	US Value 1.0%	Aggregate Bonds 1.9%	US Real Estate -10.4%	US Small -17.2%	US Small -7.5%	Aggregate Bonds 0.0%	US Small -4.4%
US Growth -10.0%	Emerging Markets -7.8%	Commodities -5.3%	US Small -3.3%	US Real Estate -1.2%	Commodities -10.7%	US Real Estate -8.6%	Commodities -2.7%	Commodities -4.9%	US Treasuries 0.7%	Emerging Markets -11.4%	US Growth -20.9%	US Growth -9.0%	Emerging Markets -1.2%	Emerging Markets -8.0%

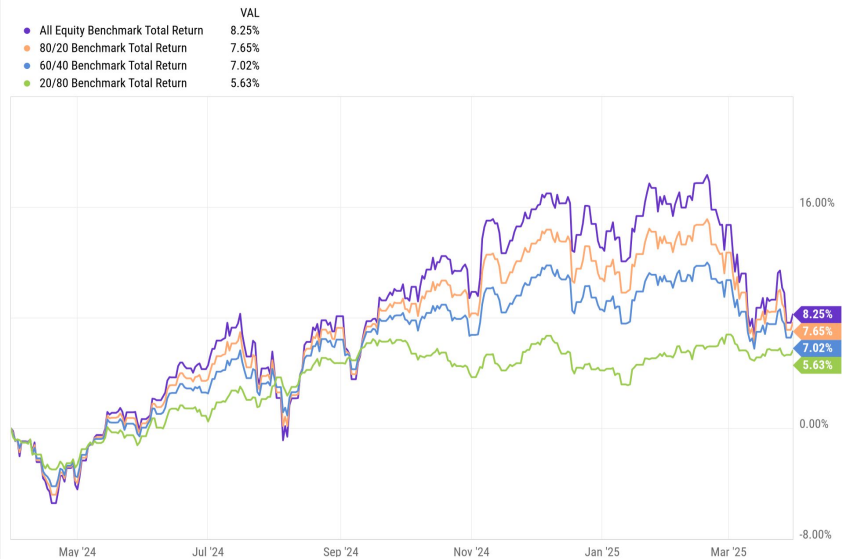
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*Data as of 3/31/2025

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Performance of Diversified Portfolios

TTM Allocation Performance



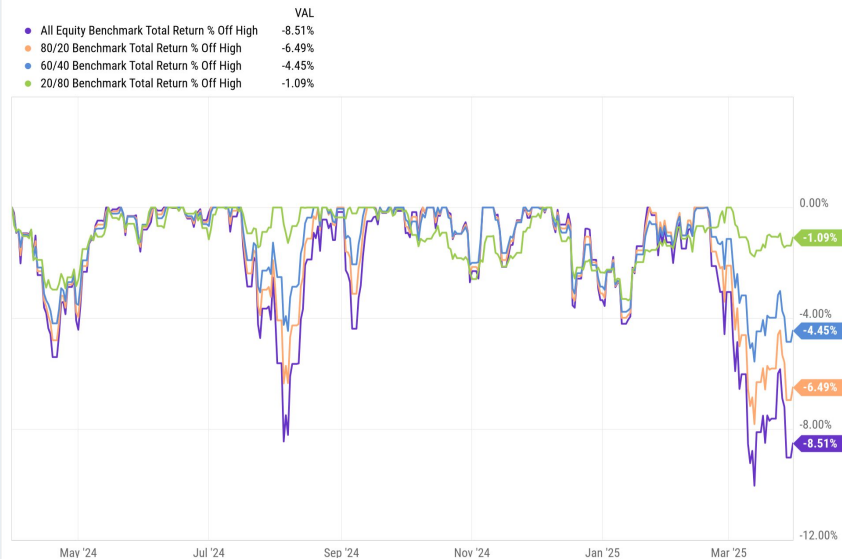
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TTM Allocation Drawdowns



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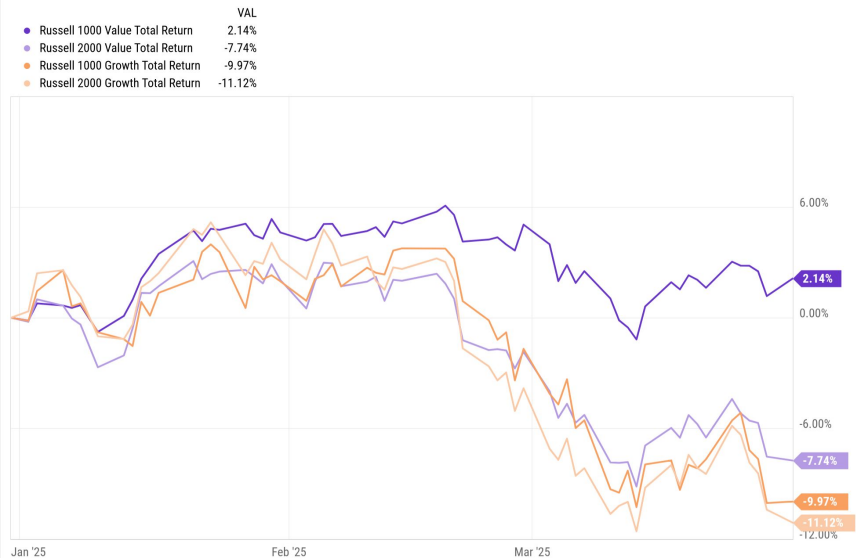
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Equity Style Performance

Value vs. Growth Performance, Q1



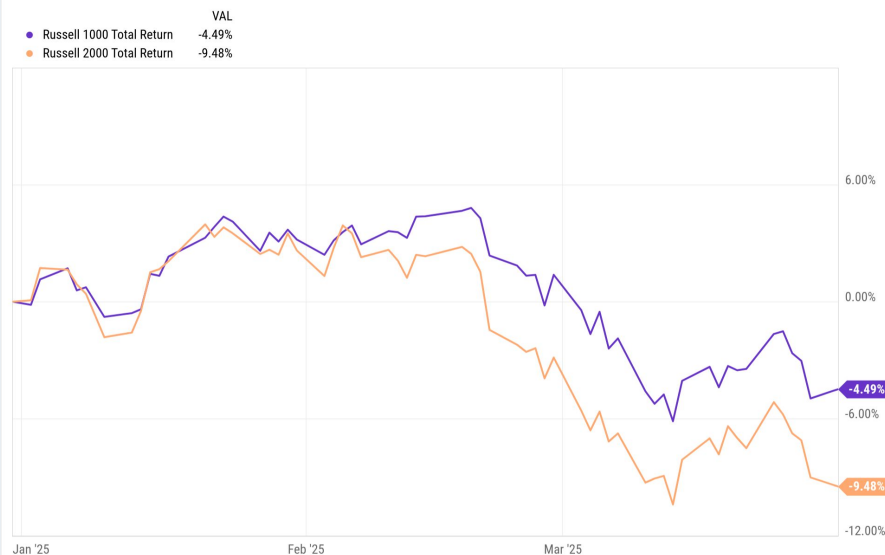
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Large Cap vs. Small Cap, Q1



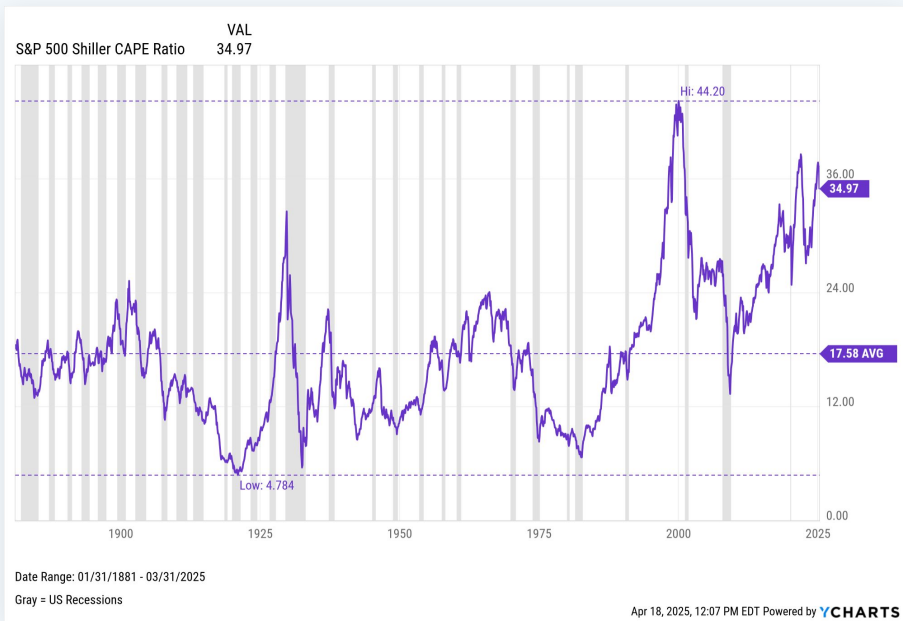
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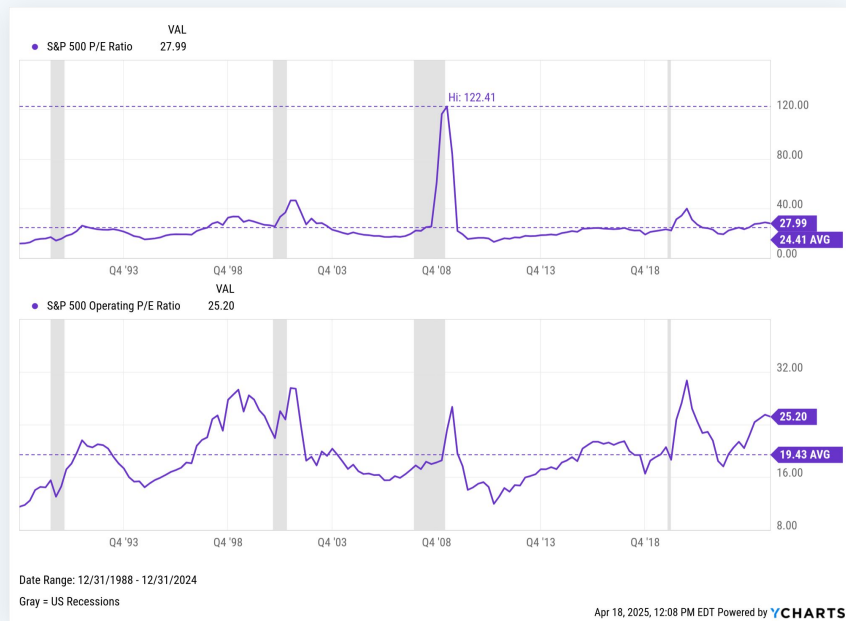
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S&P 500 Valuation Measures



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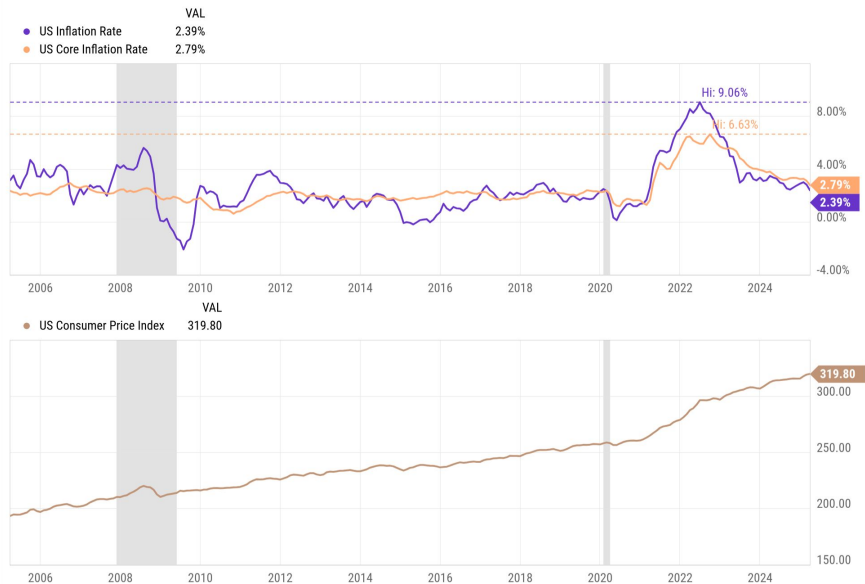


Macroeconomic Data

Leading and Lagging Economic Data
and Trends from Key Economic Reports
Published Recently

Inflation & Wage Growth

Inflation and CPI



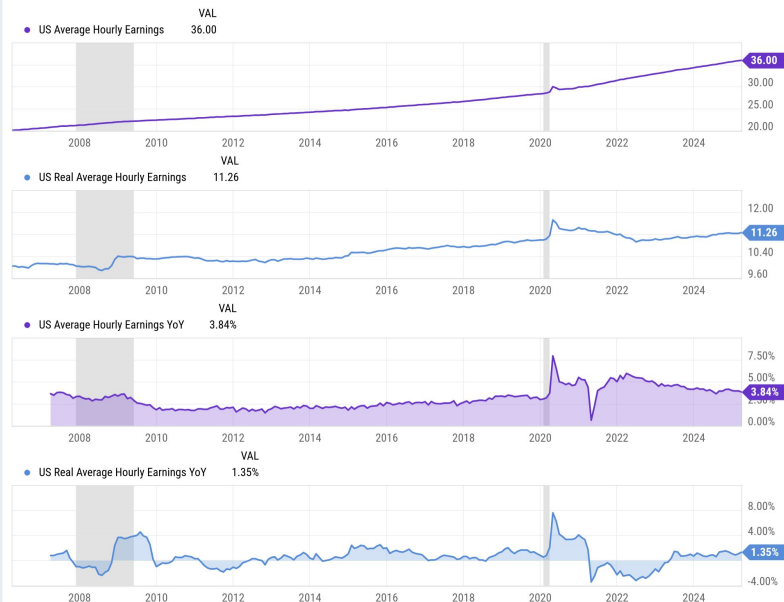
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Gray = US Recessions

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Wage Growth



Date Range: 03/31/2006 - 03/31/2025

Gray = US Recessions

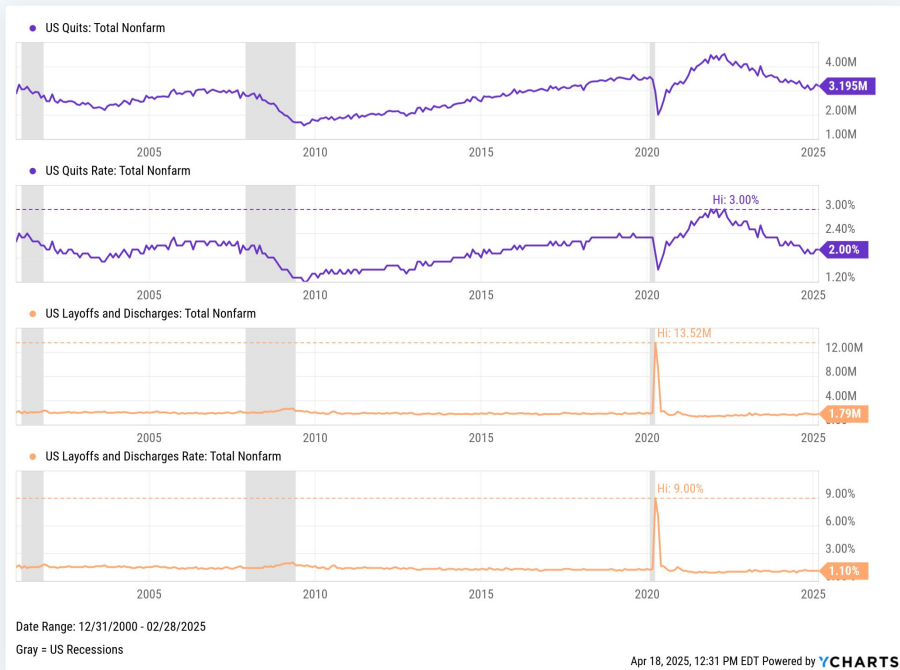
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Employment



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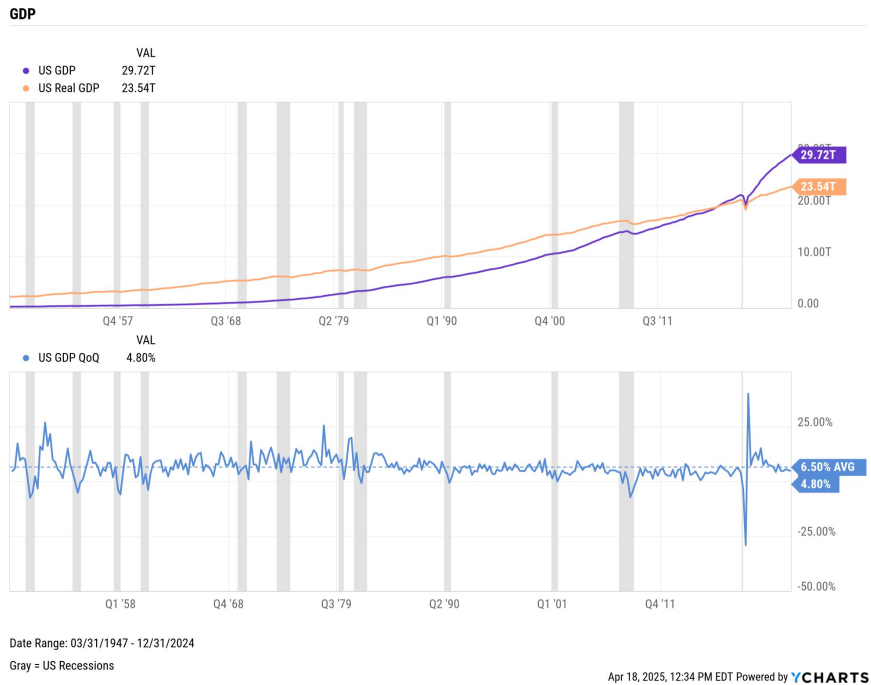


Leading Indicator Data and Trends

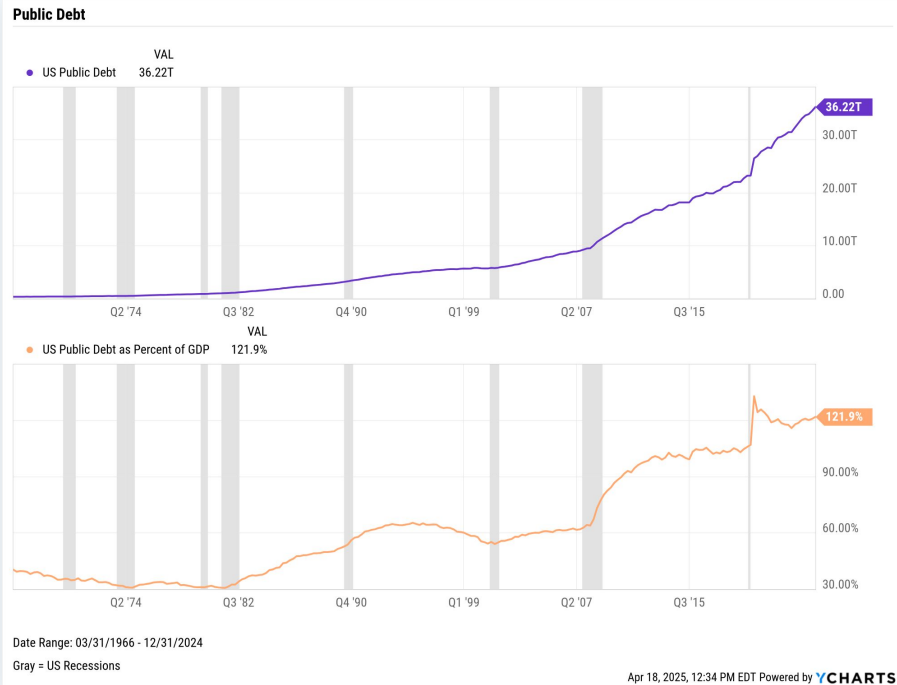
Indicator	Q1 2025	Q4 2024	Q3 2024	Q2 2024	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013
10-2 Year Treasury Yield Spread	▲ 0.34%	▲ 0.33%	▲ 0.15%	▬ -0.35%	▲ 0.33%	▲ -0.35%	▼ -0.53%	▼ 0.79%	▲ 0.80%	▲ 0.34%	▼ 0.21%	▼ 0.51%	▲ 1.25%	▼ 1.21%	▼ 1.50%	▲ 2.66%
NY Fed Business Leaders Survey Current Business Activity	▼ -19.3	▼ -5.2	▲ 0.5	▲ -4.7	▲ -5.2	▲ -14.6	▼ -17.6	▲ 14.4	▼ -26.9	▼ 3.0	▼ 5.6	▲ 16.7	▼ -0.6	▼ 2.0	▼ 7.8	▲ 7.9
Philly Fed Manufacturing Activity Index	▲ 12.5	▼ -10.9	▲ 0.9	▲ 0.5	▼ -10.9	▲ -7.9	▼ -11.6	▲ 13.8	▲ 11.2	▼ 2.4	▼ 10.9	▲ 29.3	▲ 22.6	▼ -9.0	▲ 21.6	▲ 3.8
S&P 500 Return	▼ -4.27%	▼ 2.41%	▲ 5.89%	▼ 4.28%	▼ 25.02%	▲ 26.29%	▼ -18.11%	▲ 28.71%	▼ 18.40%	▲ 31.49%	▼ -4.38%	▲ 21.83%	▲ 11.96%	▼ 1.38%	▼ 13.69%	▲ 32.39%
US Index of Consumer Sentiment	▼ 57.0	▲ 74.0	▲ 70.1	▼ 68.2	▲ 74.0	▲ 69.7	▼ 59.8	▼ 70.6	▼ 80.7	▲ 99.3	▲ 98.3	▼ 95.9	▲ 98.2	▼ 92.6	▲ 93.6	▲ 82.5
US Change in Business Inventories (YoY)	▲ 2.09%	▼ 1.80%	▲ 1.97%	▲ 1.80%	▲ 2.62%	▼ 0.08%	▼ 11.85%	▲ 13.81%	▼ -2.75%	▼ 2.06%	▲ 4.39%	▲ 3.14%	▲ 1.95%	▼ 1.87%	▼ 3.64%	▼ 4.17%
US Housing Starts (TTM, in Millions)	▼ 16.371	▼ 16.413	▼ 16.681	▼ 16.826	▼ 16.413	▼ 17.057	▼ 18.645	▲ 19.288	▲ 16.741	▲ 15.492	▲ 14.968	▲ 14.456	▲ 14.125	▲ 13.281	▲ 12.003	▲ 11.138
US Building Permits (TTM, in Millions)	▼ 17.402	▼ 17.544	▼ 17.722	▼ 18.015	▼ 17.544	▼ 18.217	▼ 20.120	▲ 20.938	▲ 17.709	▲ 16.628	▲ 15.933	▲ 15.425	▲ 14.468	▲ 14.129	▲ 12.625	▲ 11.856
US Change in Retail Sales (YoY)	▼ 4.58%	▲ 4.65%	▲ 1.80%	▼ 1.67%	▲ 4.65%	▲ 4.03%	▼ 3.72%	▲ 14.73%	▲ 6.53%	▲ 5.04%	▼ 0.63%	▲ 5.06%	▲ 4.02%	▼ 2.32%	▼ 3.08%	▼ 3.34%

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GDP & Public Debt



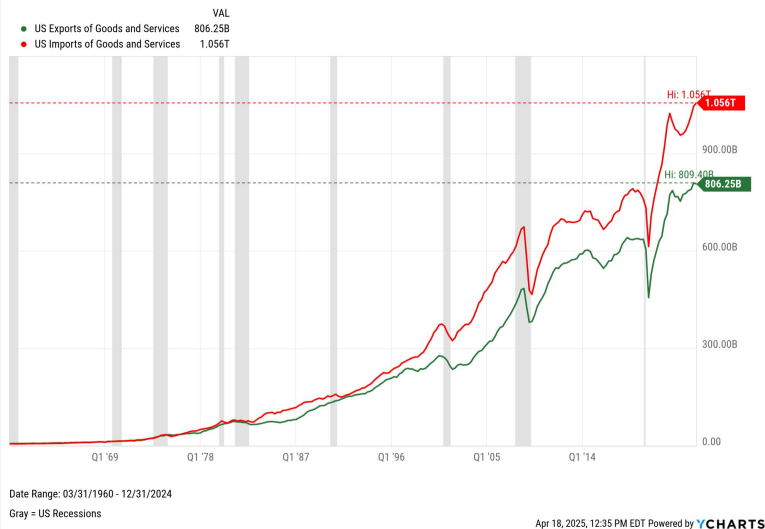
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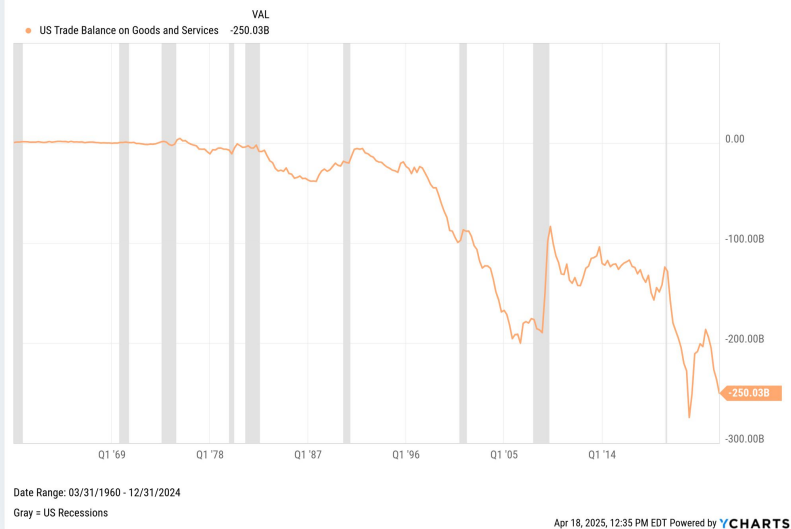
US Trade Balance

US Total Exports vs Imports



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US Total Exports vs Imports

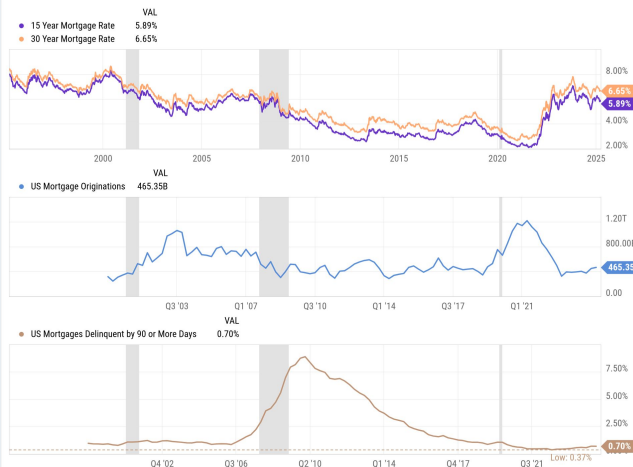


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	Exports														
	Total	QoQ	YoY	Canada	QoQ	YoY	Mexico	QoQ	YoY	EU	QoQ	YoY	China	QoQ	YoY
Total:	\$806.2 B	-0.3%	4.0%	\$110.9 B	1.9%	0.3%	\$95.1 B	-1.9%	2.6%	\$164.8 B	-0.5%	2.0%	\$47.6 B	-4.4%	-1.0%
Goods:	\$519.2 B	-2%	1%	\$88.6 B	4%	-1%	\$82.3 B	-3%	1%	\$94.5 B	-1%	-1%	\$33.5 B	-7%	-7%
Services:	\$287.1 B	3%	9%	\$22.3 B	-5%	5%	\$12.9 B	8%	11%	\$70.4 B	0%	6%	\$14.0 B	1%	13%
	Imports														
Total:	\$1,056.3 B	1.0%	9.6%	\$121.4 B	-2.9%	5.6%	\$143.1 B	0.7%	6.8%	\$203.3 B	-3.1%	5.7%	\$116.4 B	-3.6%	6.7%
Goods:	\$845.3 B	1%	9%	\$107.0 B	-3%	5%	\$130.7 B	-1%	6%	\$153.0 B	-3%	5%	\$110.2 B	-5%	5%
Services:	\$211.0 B	2%	9%	\$14.4 B	-4%	6%	\$12.4 B	14%	7%	\$50.3 B	-4%	6%	\$6.2 B	12%	25%

US Housing Market Data

Mortgage Rates and Originations, 30Y View



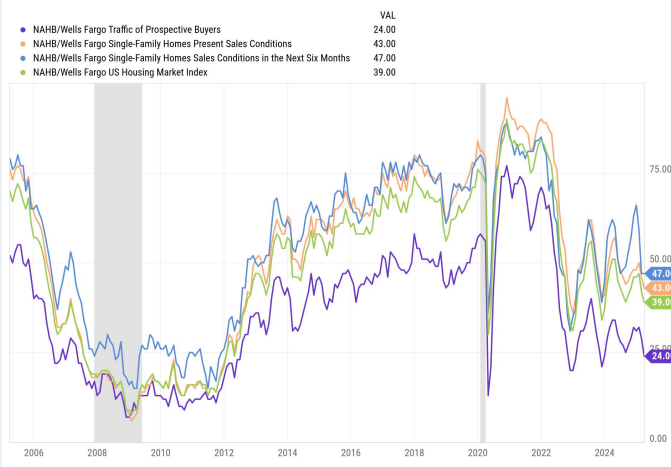
Date Range: 03/31/1995 - 03/27/2025

Gray = US Recessions

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NAHB Housing Sentiment & Components



Date Range: 03/31/2005 - 03/31/2025

Gray = US Recessions. Source: NAHB

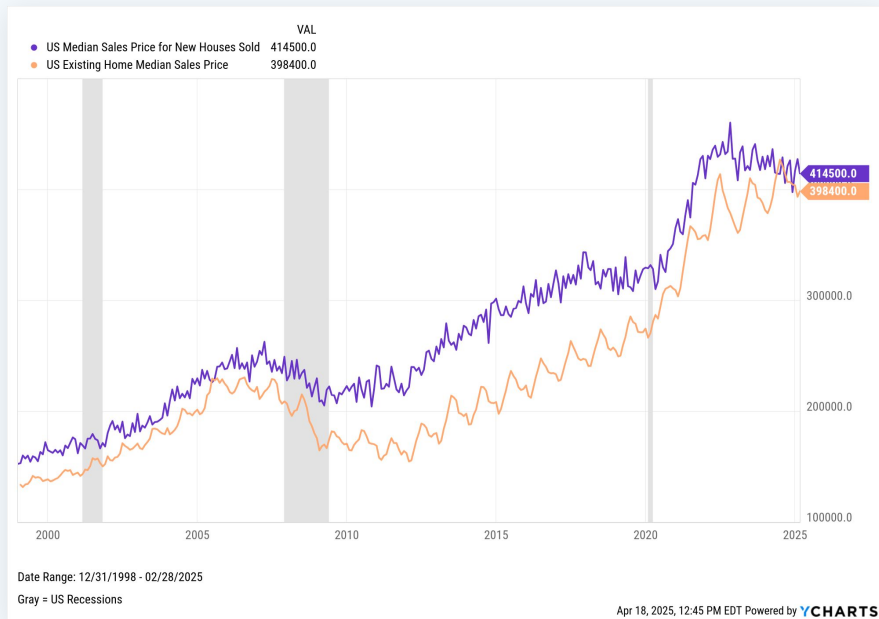
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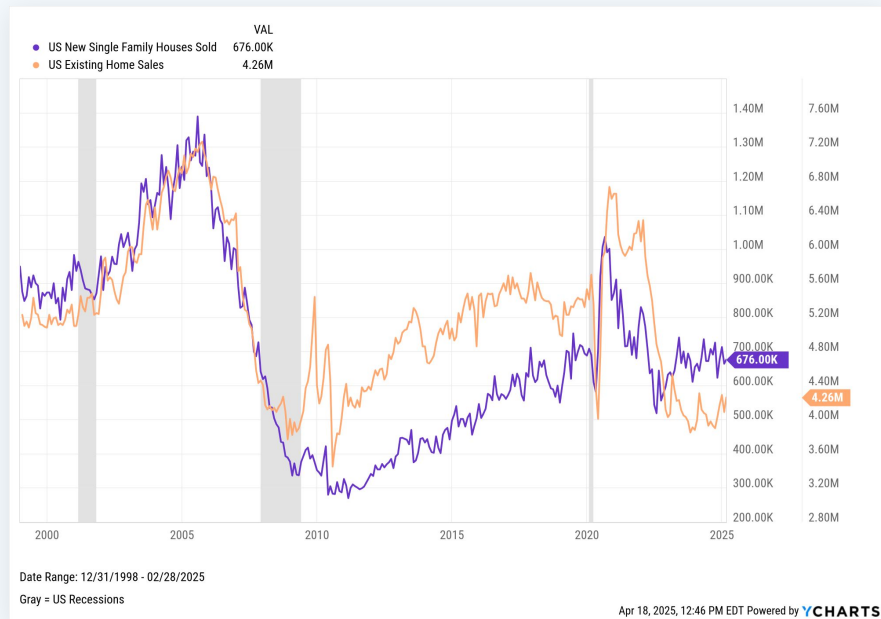
Housing Indicator Review

Overall	Indicator Name	Latest Period	Frequency	Value	1 Mo. Ago		3 Mo. Ago		1 Yr. Ago	
					1 Mo. Ago	% Change	3 Mo. Ago	% Change	1 Yr. Ago	% Change
▲	Case-Shiller Home Price Index: National	1/31/2025	monthly	329.4	328	▲ 0.57%	324	▲ 1.53%	316	▲ 4.11%
▼	US Housing Starts	3/31/2025	monthly	1,324	1,494	▼ -11.38%	1,526	▼ -13.24%	1,299	▲ 1.92%
▲	US Building Permits	3/31/2025	monthly	1,482	1,459	▲ 1.58%	1,482	▬ 0.00%	1,485	▼ -0.20%
▲	US New Single Family Houses Sold	2/28/2025	monthly	676	664	▲ 1.81%	676	▬ 0.00%	643	▲ 5.13%
▲	US Pending Home Sales Index	2/28/2025	monthly	72	71	▲ 1.98%	77	▼ -6.74%	75	▼ -3.61%
▼	30 Year Mortgage Rate	3/31/2025	weekly	6.65%	6.76%	▼ -1.63%	6.85%	▼ -2.92%	6.79%	▼ -2.06%
▼	US Households	12/31/2024	monthly	132,276	132,405	▼ -0.10%	132,508	▼ -0.18%	131,277	▲ 0.76%

US Housing Market Data (cont.)



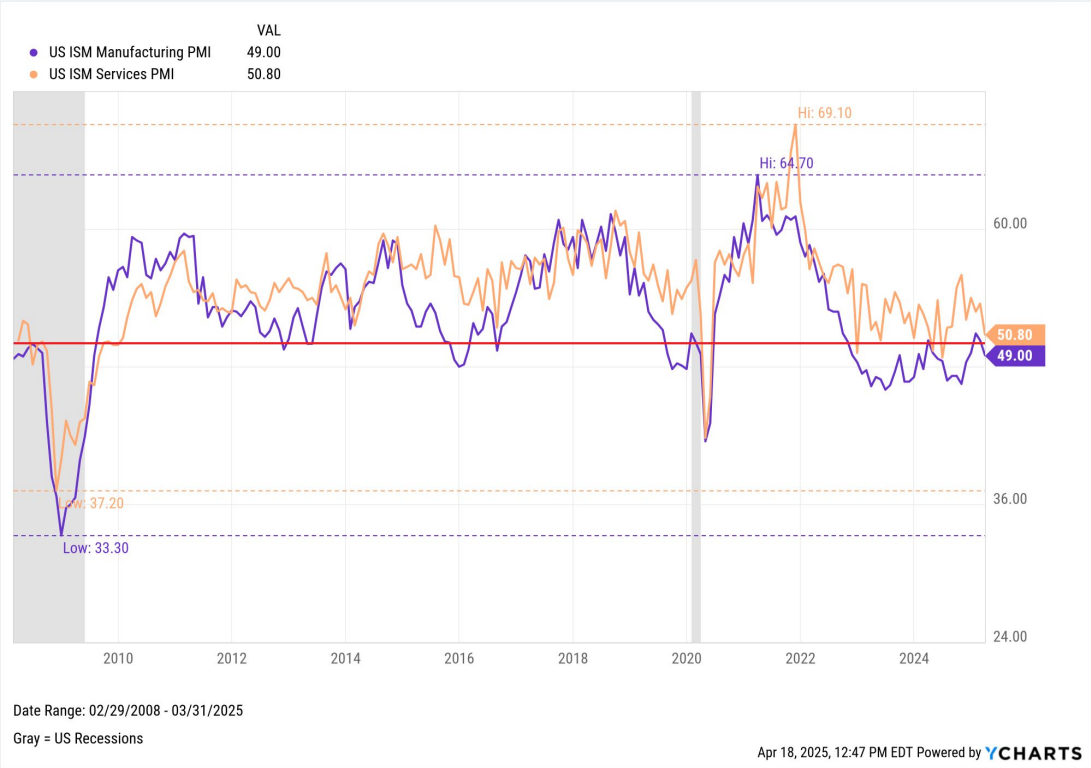
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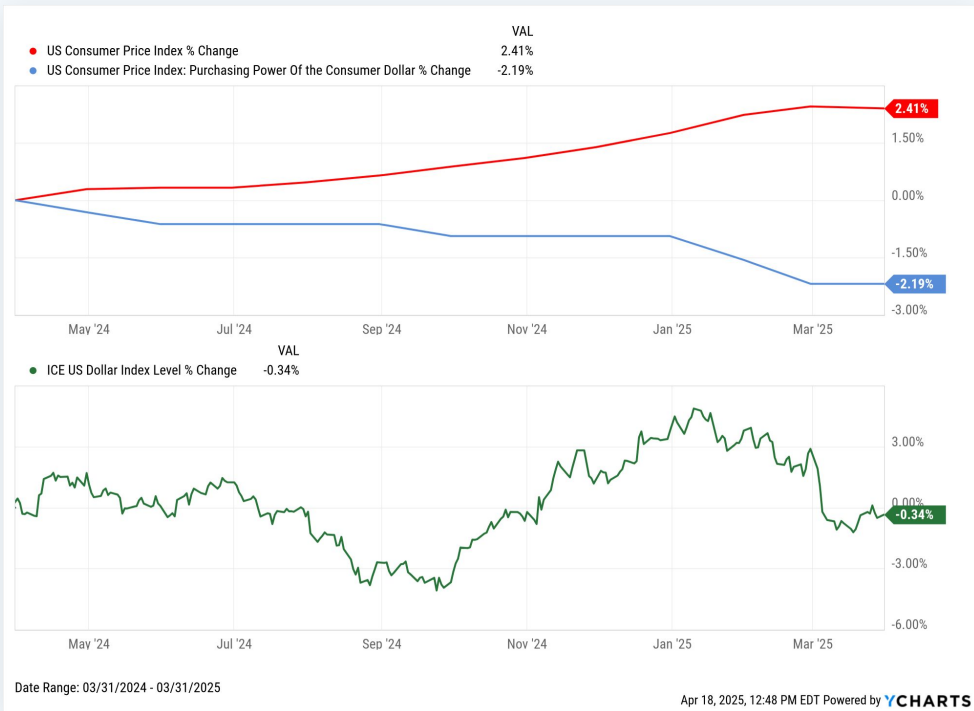


Manufacturing & Services

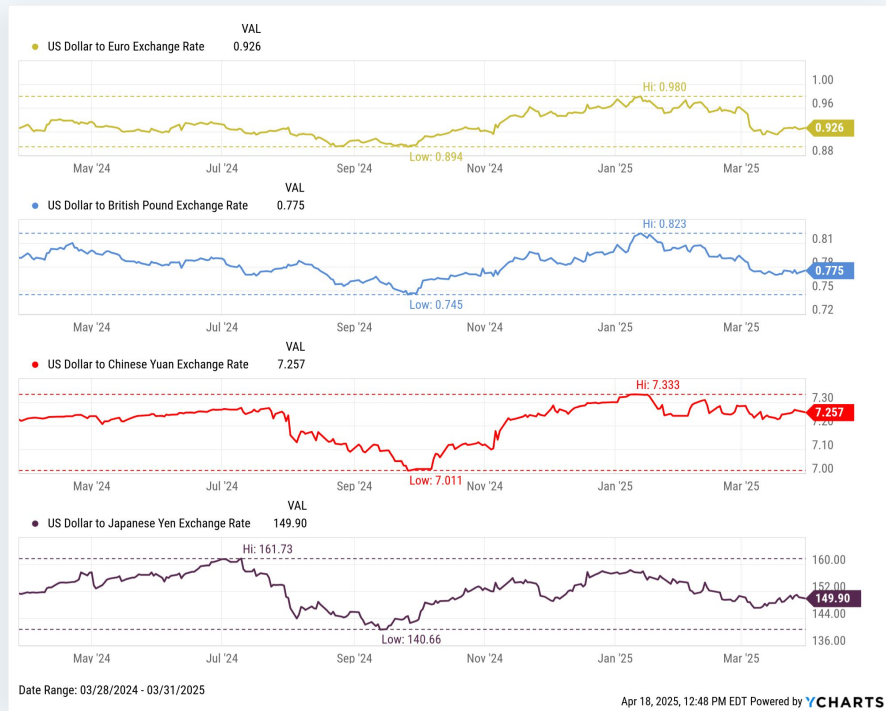


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US Dollar Strength



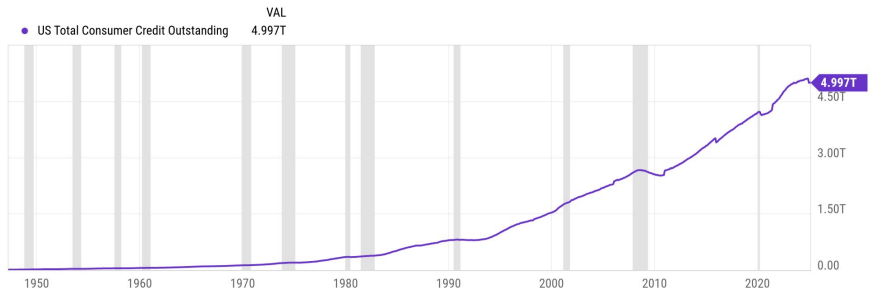
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Consumers

Consumer Savings and Credit



Date Range: 03/31/1947 - 02/28/2025

Gray = US Recessions

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Sales and Consumer Sentiment



Date Range: 03/31/1995 - 03/31/2025

Gray = US Recessions

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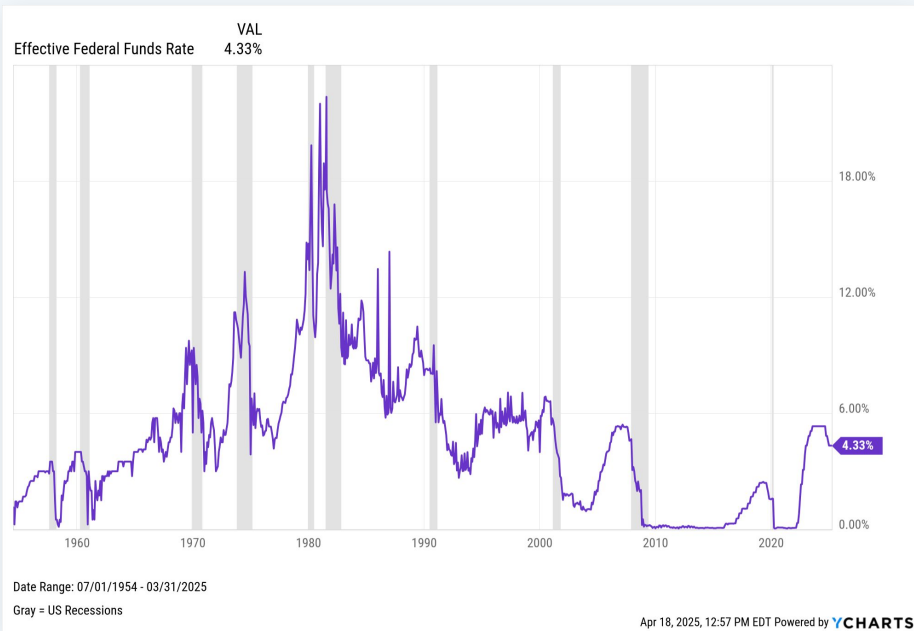
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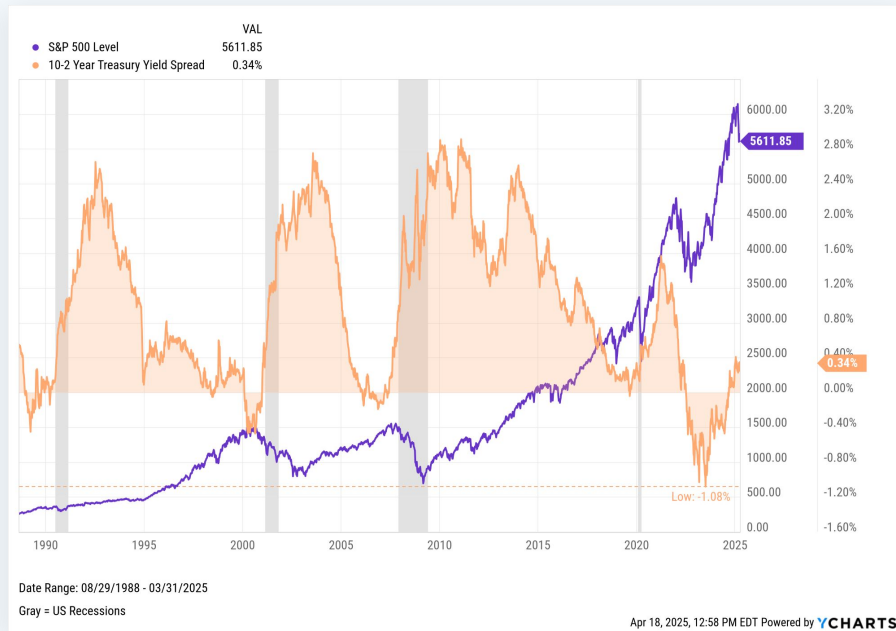
Bonds & Interest Rates

Collection of Data Summarizing Moves
in the Fixed Income Markets over the
Last Quarter

Interest Rates & Spreads



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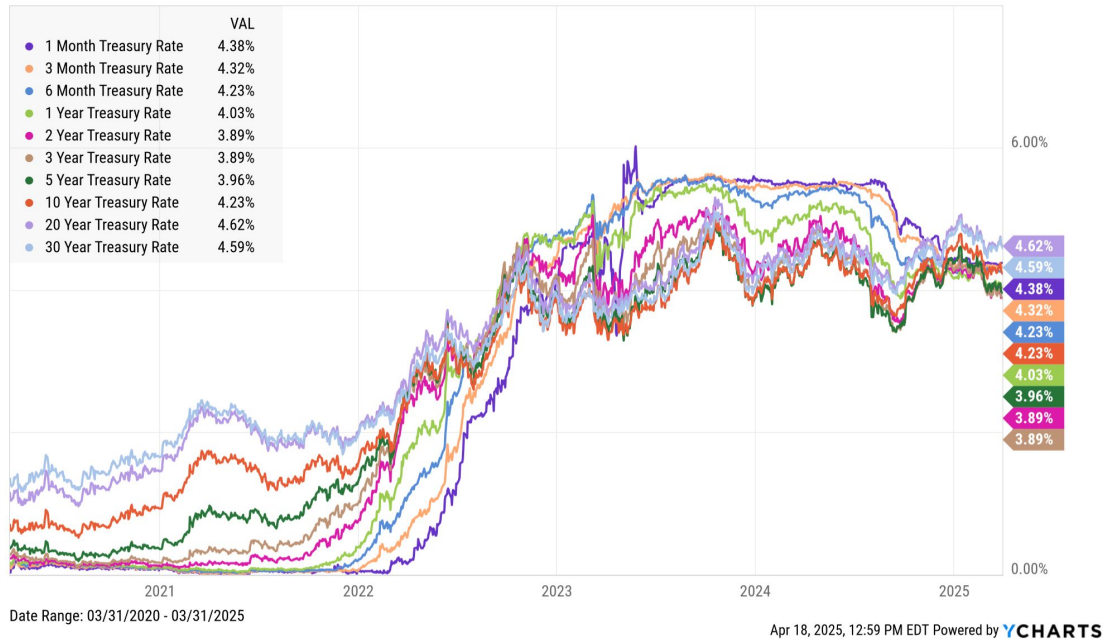


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Treasury Yield Curve

Duration	Rate	QoQ Δ
1-Month	4.38%	▼ 2 bps
3-Month	4.32%	▼ 5 bps
6-Month	4.23%	▼ 1 bp
1-Year	4.03%	▼ 13 bps
2-Year	3.89%	▼ 36 bps
3-Year	3.89%	▼ 38 bps
5-Year	3.96%	▼ 42 bps
10-Year	4.23%	▼ 35 bps
20-Year	4.62%	▼ 24 bps
30-Year	4.59%	▼ 19 bps

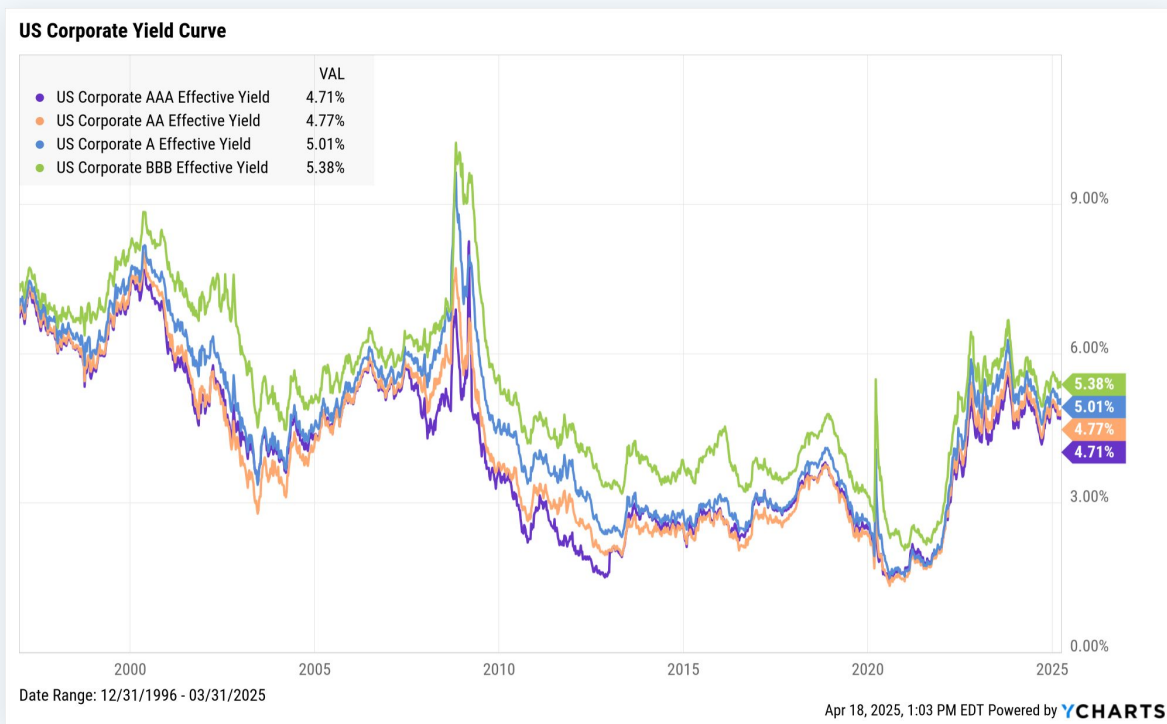
US Treasury Yield Curve



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Corporate Yields

Type	Rate	QoQ Δ
AAA	4.71%	▼ 21 bps
AA	4.77%	▼ 24 bps
A	5.01%	▼ 21 bps
BBB	5.38%	▼ 17 bps



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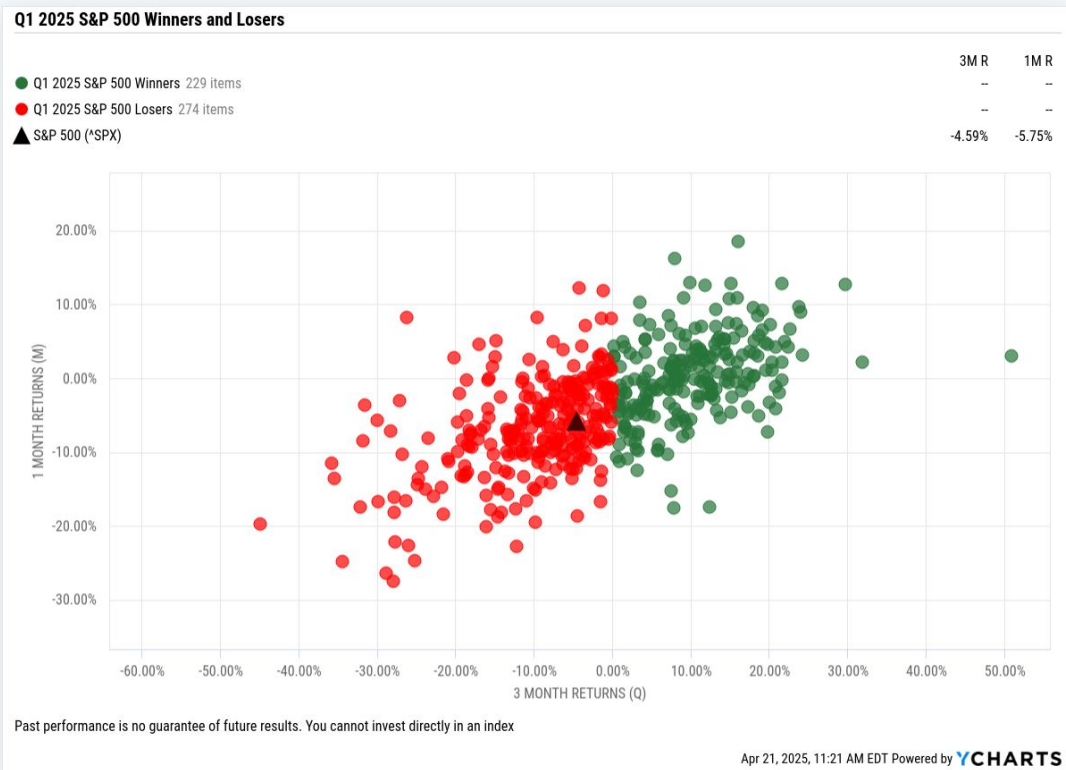


Charts of the Moment

Visuals Depicting Trends that are
Impacting the Markets and Investments

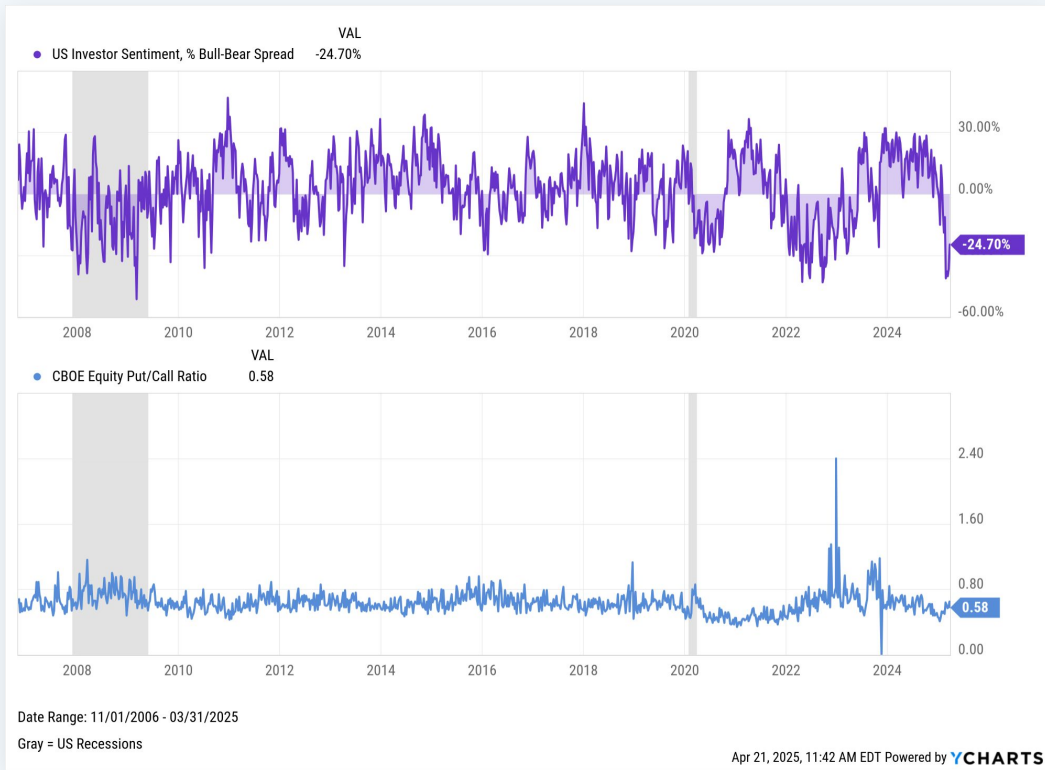


Q1 S&P 500 Winners & Losers



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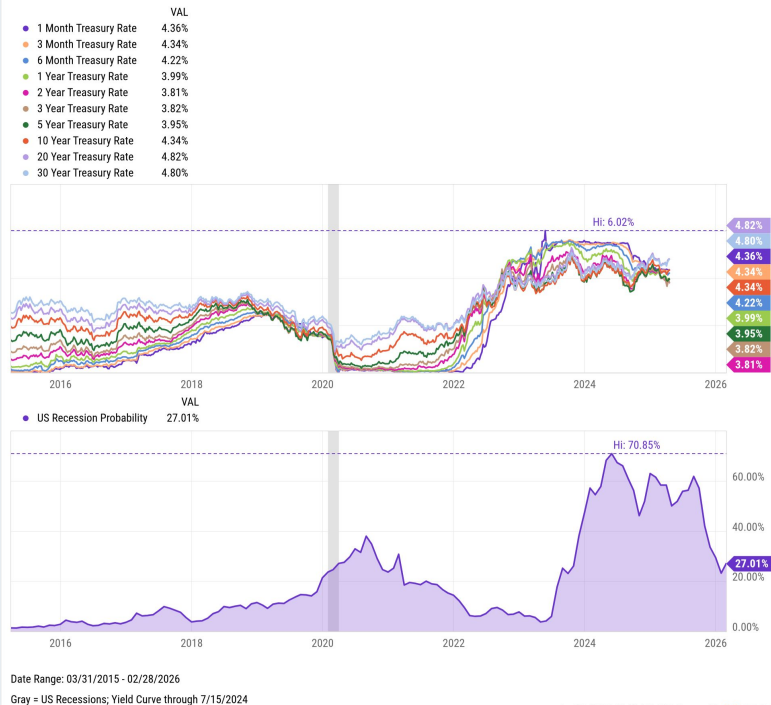
Investor Sentiment ▼



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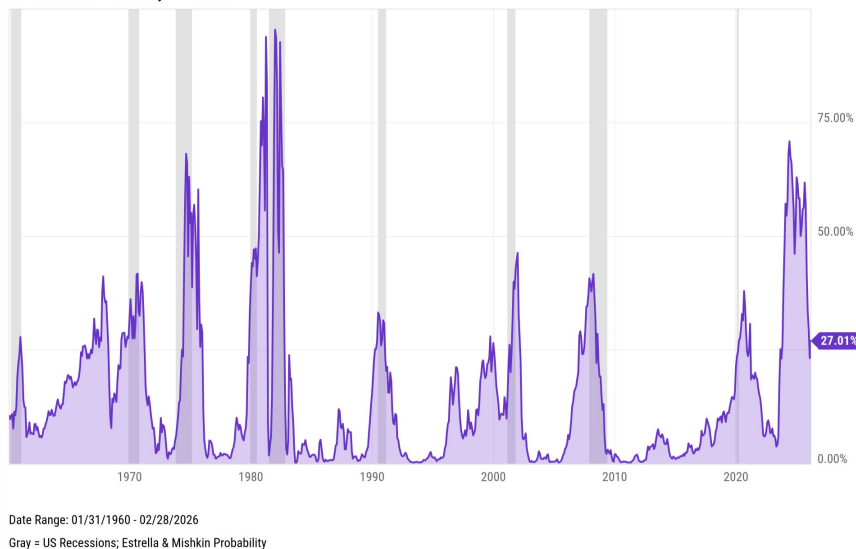
Yield Curve 🤝 Recession Probability

US Treasury Yield Curve <=> Recession Probability 1 Year Out



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US Recession Probability VAL



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Index Concentration

SPY Top 10 Holdings

SPY Holdings		
< Mar 2025 >		
Symbol	Name	% Weight
AAPL	Apple Inc	7.01%
MSFT	Microsoft Corp	5.87%
NVDA	NVIDIA Corp	5.58%
AMZN	Amazon.com Inc	3.77%
META	Meta Platforms Inc	2.65%
BRK.B	Berkshire Hathaway Inc	2.05%
GOOGL	Alphabet Inc	1.90%
AVGO	Broadcom Inc	1.65%
GOOG	Alphabet Inc	1.55%
TSLA	Tesla Inc	1.52%

Top 10 = 33.55% of SPY

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QQQ Top 10 Holdings

QQQ Holdings		
< Feb 2025 >		
Symbol	Name	% Weight
AAPL	Apple Inc	9.49%
NVDA	NVIDIA Corp	7.94%
MSFT	Microsoft Corp	7.66%
AMZN	Amazon.com Inc	5.80%
AVGO	Broadcom Inc	4.00%
META	Meta Platforms Inc	3.78%
COST	Costco Wholesale Corp	2.97%
TSLA	Tesla Inc	2.76%
NFLX	Netflix Inc	2.68%
GOOGL	Alphabet Inc	2.58%

Top 10 = 49.66% of QQQ

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S&P 500 vs. S&P 493 vs. Mag Seven



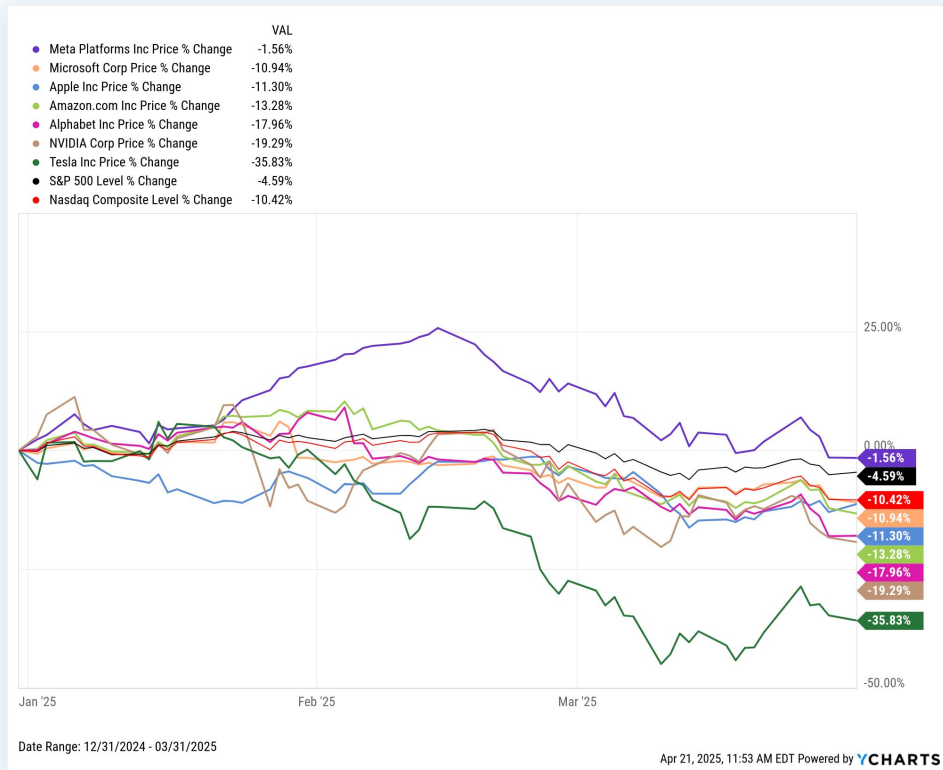
Date Range: 12/31/2024 - 03/31/2025

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

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How the Mag Seven Have Fallen



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