

YCHARTS

The Top 23 Charts of 2023



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The Markets

Key Stock Market Index Performance

2022



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2023

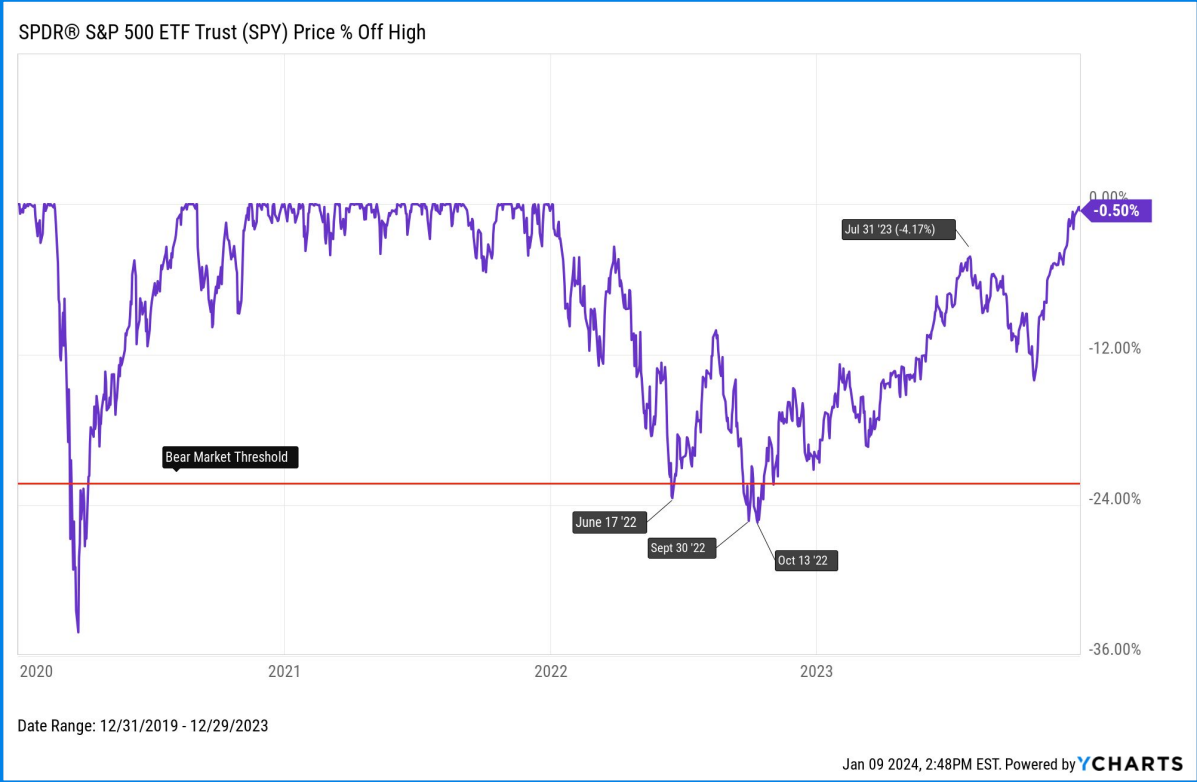


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End of the Bear Market

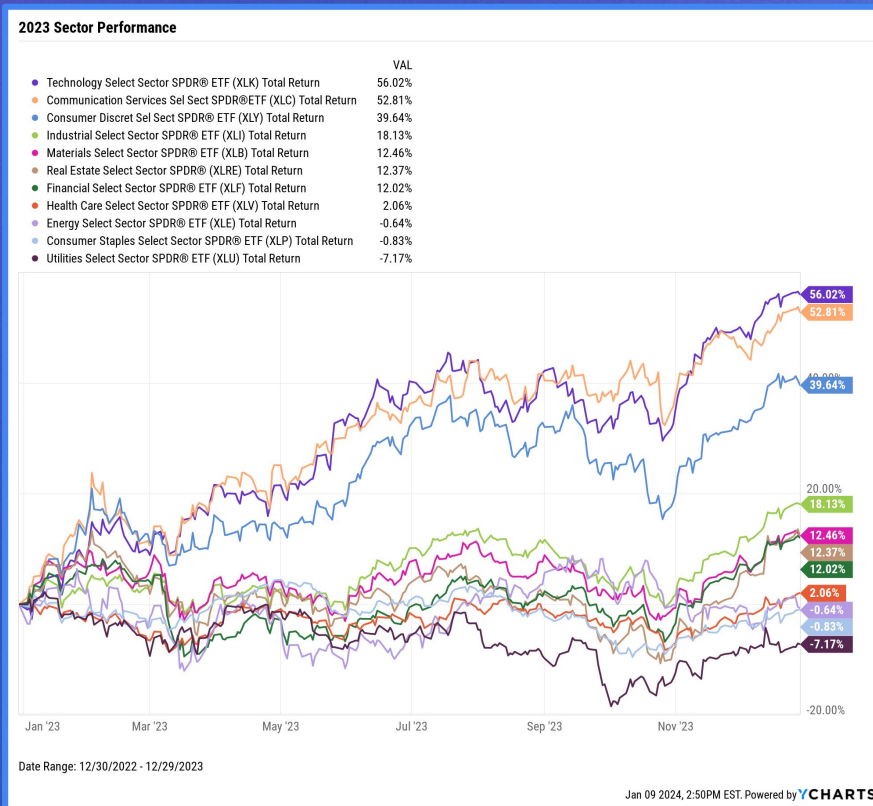


Brian Portnoy



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Sector Winners & Losers



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Asset Class Performance

**returns above 1 year are annualized*

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
US Growth 36.6%	US Real Estate 12.3%	US Growth 3.4%	US Growth 13.1%	US Growth 26.2%	Commodities 22.9%	US Growth 16.4%	US Growth 14.7%
S&P 500 20.8%	US Growth 10.9%	Muni Bonds 2.4%	Commodities 11.8%	S&P 500 13.8%	S&P 500 9.8%	S&P 500 12.5%	S&P 500 11.8%
World exUSA 12.4%	World exUSA 9.4%	S&P 500 1.7%	S&P 500 10.2%	World exUSA 11.9%	US Growth 8.9%	Commodities 7.7%	US Value 8.1%
Emerging Markets 6.1%	S&P 500 9.1%	World exUSA 1.3%	US Value 7.1%	Emerging Markets 4.6%	US Value 8.3%	US Value 7.5%	US Real Estate 6.8%
US Value 5.6%	US Small 9.1%	Emerging Markets 1.2%	World exUSA 5.4%	Muni Bonds 4.3%	World exUSA 4.7%	World exUSA 6.7%	US Small 6.1%
US Small 4.2%	Emerging Markets 8.0%	US Real Estate 0.4%	Emerging Markets 4.9%	US Value 1.4%	US Real Estate 3.2%	US Small 4.8%	World exUSA 4.4%
Muni Bonds 4.0%	US Value 7.5%	Aggregate Bonds 0.3%	US Real Estate 4.7%	Aggregate Bonds 1.2%	US Small 1.1%	US Real Estate 3.8%	Muni Bonds 2.8%
US Real Estate 3.0%	Muni Bonds 6.3%	US Treasuries 0.0%	US Small 4.2%	US Treasuries 0.1%	Muni Bonds -1.0%	Emerging Markets 2.7%	Emerging Markets 2.5%
Aggregate Bonds 1.6%	Aggregate Bonds 4.5%	US Value -0.3%	Muni Bonds 2.3%	US Real Estate -1.9%	Emerging Markets -3.7%	Muni Bonds 2.0%	Aggregate Bonds 1.4%
US Treasuries 0.7%	US Treasuries 3.5%	Commodities -3.8%	Aggregate Bonds -0.8%	Commodities -2.4%	Aggregate Bonds -4.5%	Aggregate Bonds 0.7%	US Treasuries 0.8%
Commodities -1.0%	Commodities -3.6%	US Small -4.4%	US Treasuries -1.7%	US Small -2.6%	US Treasuries -4.9%	US Treasuries 0.3%	Commodities -3.1%

** data as of 11/30/2023.*

Contact support@ycharts.com to access this asset class performance quilt

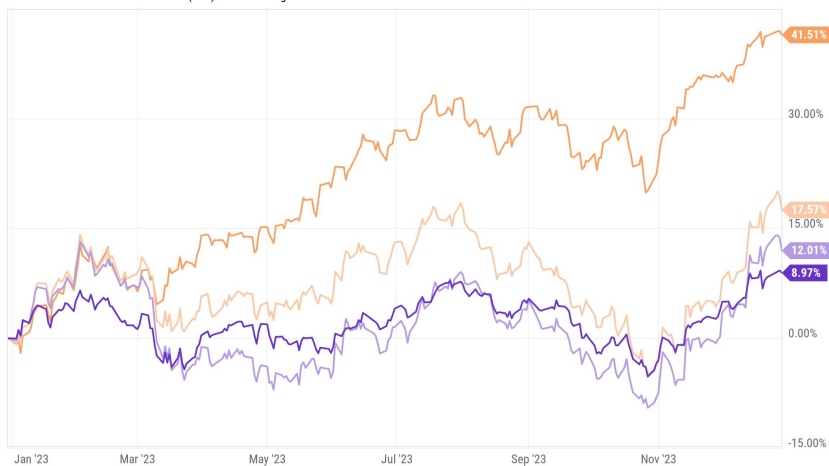
Value vs. Growth



Michael Antonelli

- iShares Russell 1000 Growth ETF (IWF) Price % Change 41.51%
- iShares Russell 2000 Growth ETF (IWO) Price % Change 17.57%
- iShares Russell 2000 Value ETF (IWN) Price % Change 12.01%
- iShares Russell 1000 Value ETF (IWD) Price % Change 8.97%

VAL
41.51%
17.57%
12.01%
8.97%



Date Range: 12/30/2022 - 12/29/2023

Jan 09 2024, 2:53PM EST. Powered by YCHARTS

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Lyn Alden

Russell 1000 Growth Total Return Total Return Level / Russell 1000 Value Total Return Total Return Level

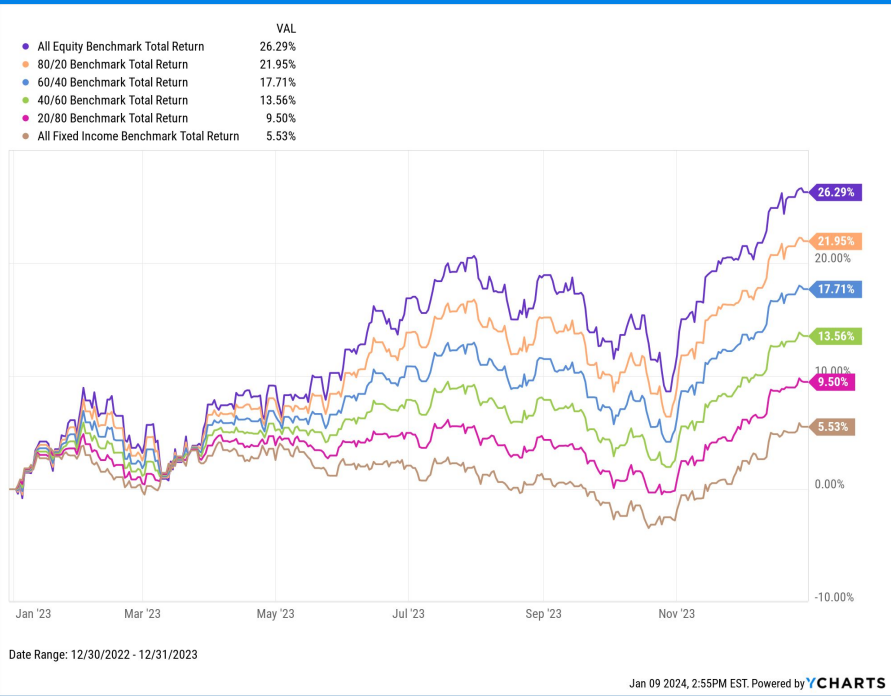


Date Range: 12/31/1978 - 12/29/2023

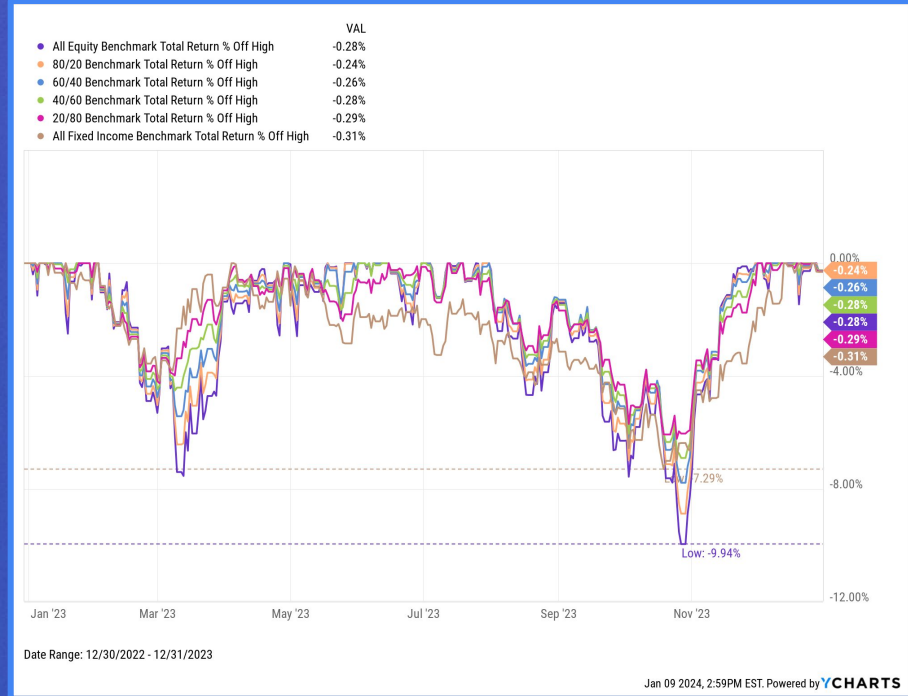
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Portfolio Allocation Performances

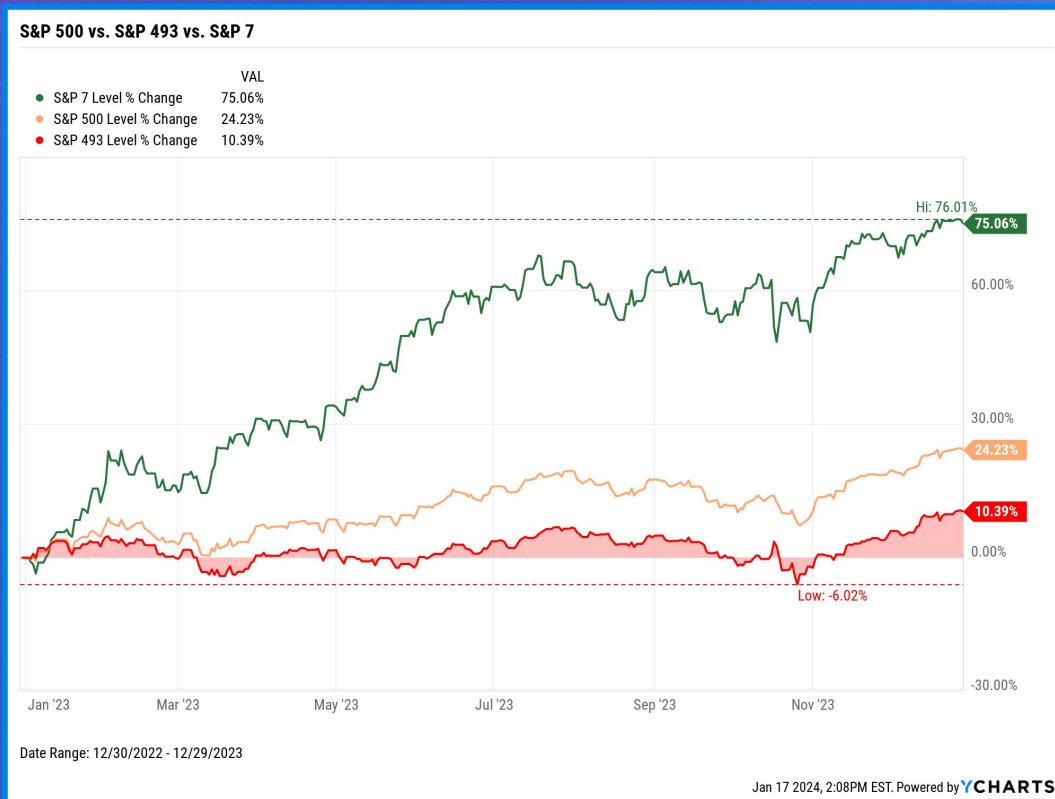


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The Magnificent Seven / "S&P 7"



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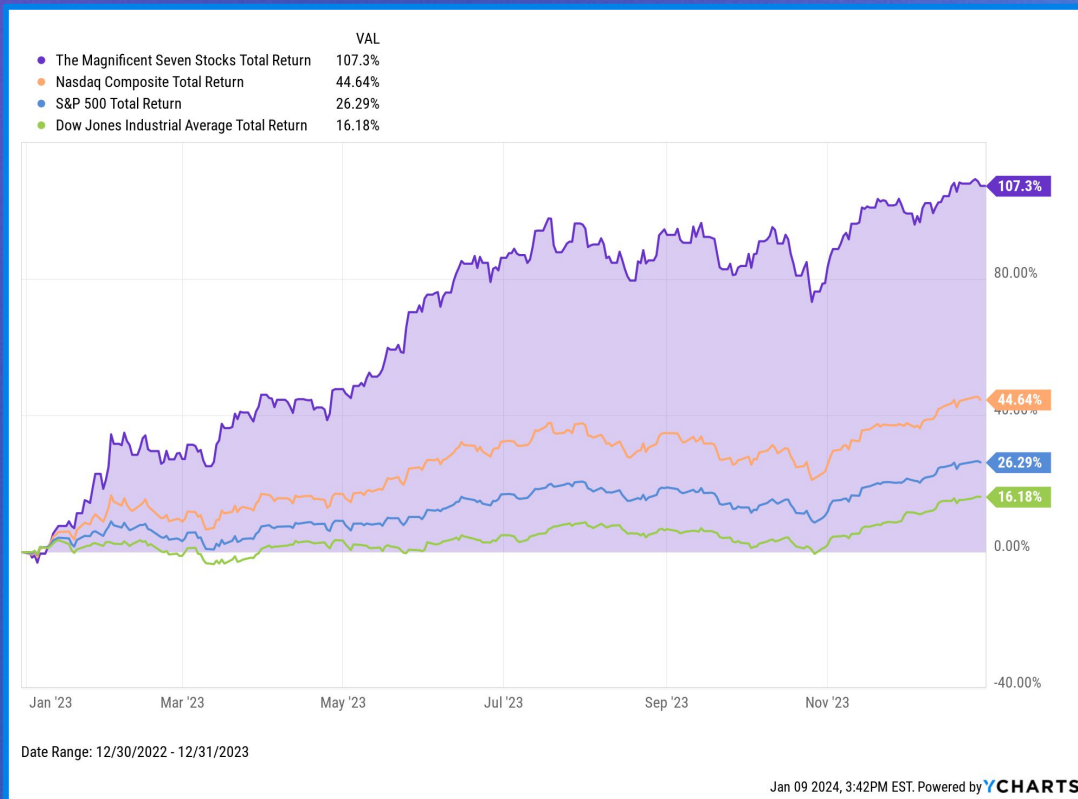
The Magnificent Seven / "S&P 7" (con't)



Stephanie Link



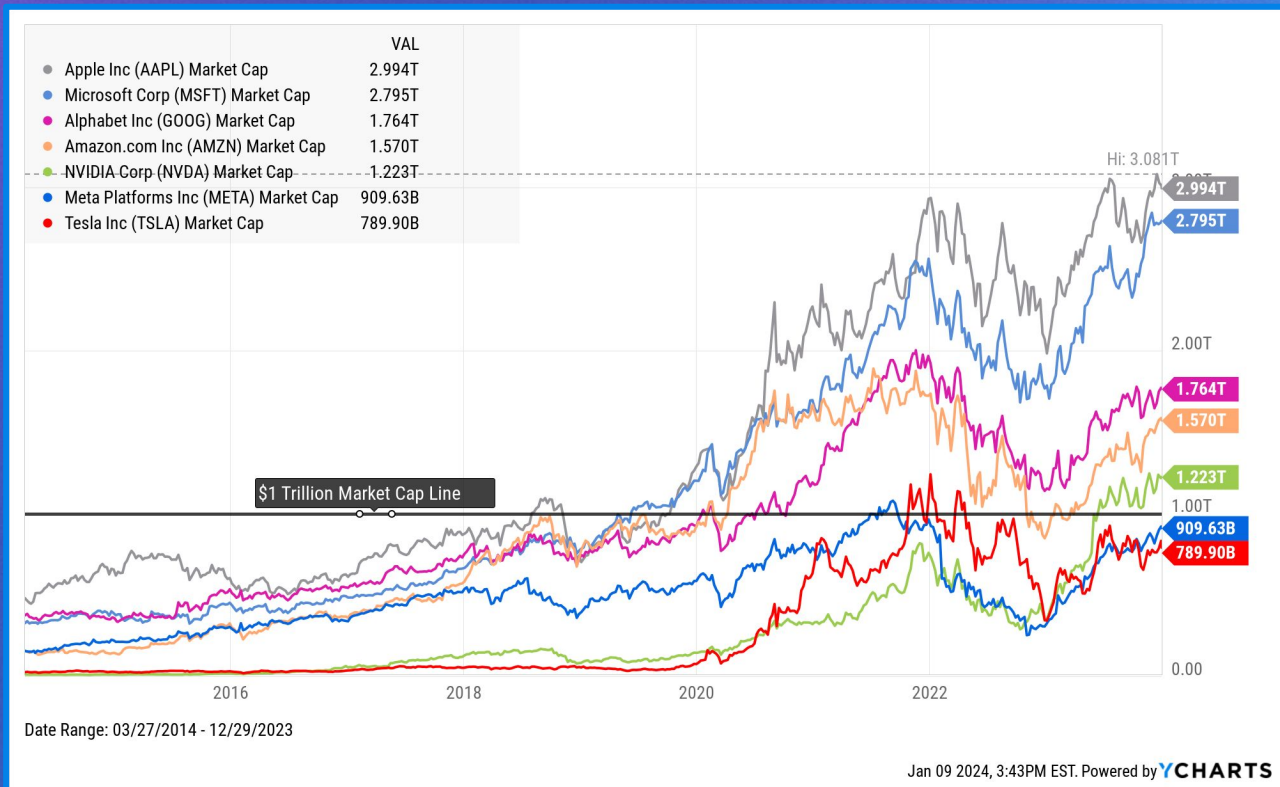
Blair duQuesnay



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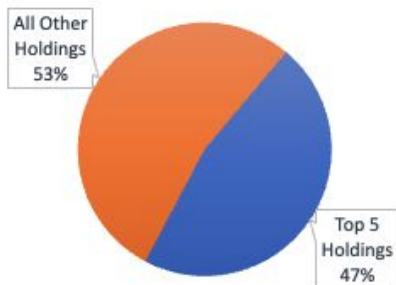
\$1T Market Cap Club



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The NASDAQ Special Rebalance: Before & After

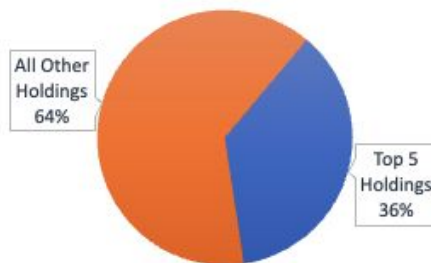
QQQ Holdings Before Special Rebalance



Name	Sector	Weight
Microsoft Corp	Technology	12.92%
Apple Inc	Technology	12.57%
Alphabet Inc	Communication Services	7.35%
Amazon.com Inc	Consumer Cyclical	6.94%
NVIDIA Corp	Technology	6.85%
Tesla Inc	Consumer Cyclical	4.25%
Meta Platforms Inc	Communication Services	4.22%
Broadcom Inc	Technology	2.40%
PepsiCo Inc	Consumer Defensive	1.70%
Costco Wholesale Co	Consumer Defensive	1.59%

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QQQ Holdings After Special Rebalance



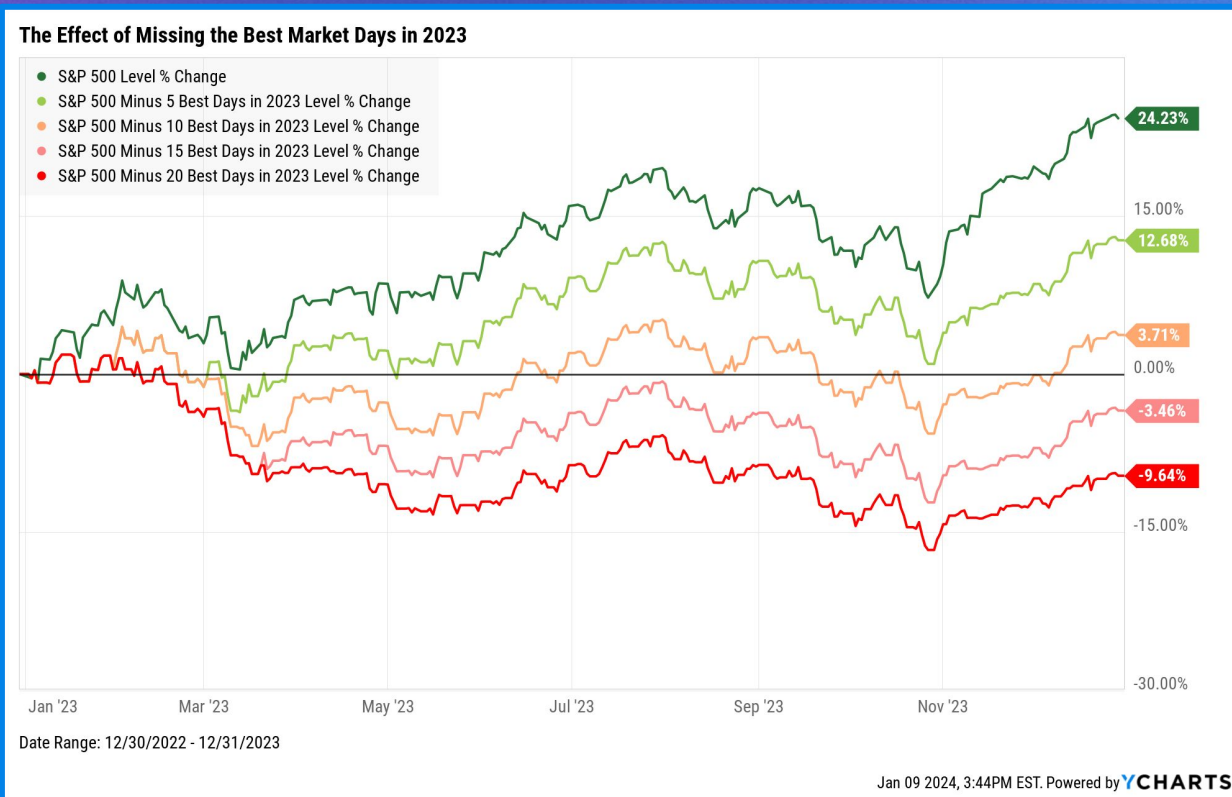
Name	Sector	Weight
Apple Inc	Technology	11.64%
Microsoft Corp	Technology	9.41%
Alphabet Inc	Communication Services	5.91%
Amazon.com Inc	Consumer Cyclical	5.17%
NVIDIA Corp	Technology	4.35%
Meta Platforms Inc	Communication Services	3.72%
Tesla Inc	Consumer Cyclical	3.19%
Broadcom Inc	Technology	3.03%
PepsiCo Inc	Consumer Defensive	2.09%
Adobe Inc	Technology	2.02%

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What If You Missed the Best Market Days This Year?



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Market Valuation



Lyn Alden

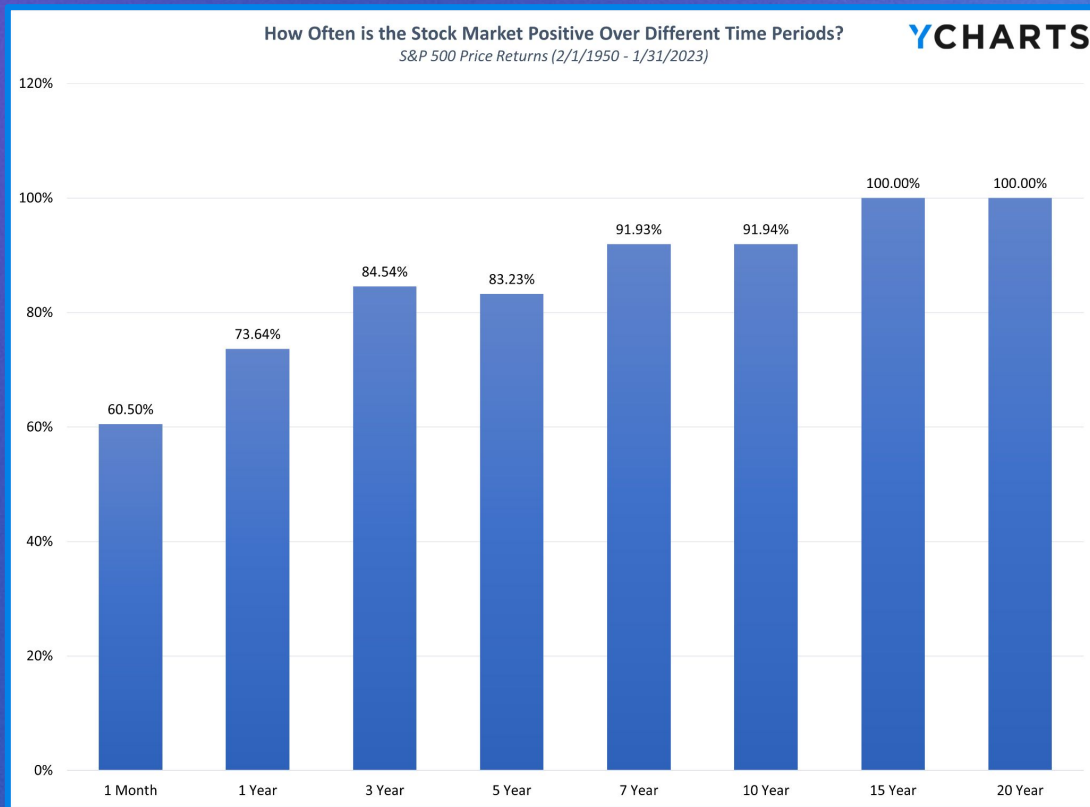


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Stock Market Positivity



Michael Antonelli



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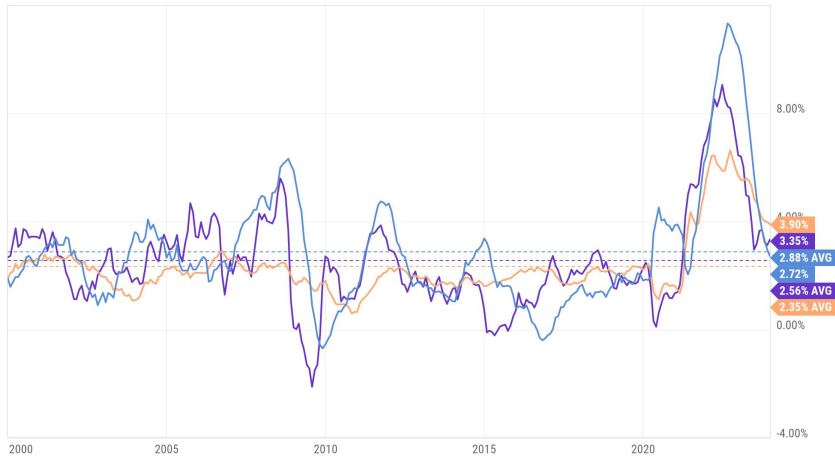
The Economy

Inflation



Brian Portnoy

- US Consumer Price Index YoY
- US Core Consumer Price Index YoY
- US Consumer Price Index: Food YoY

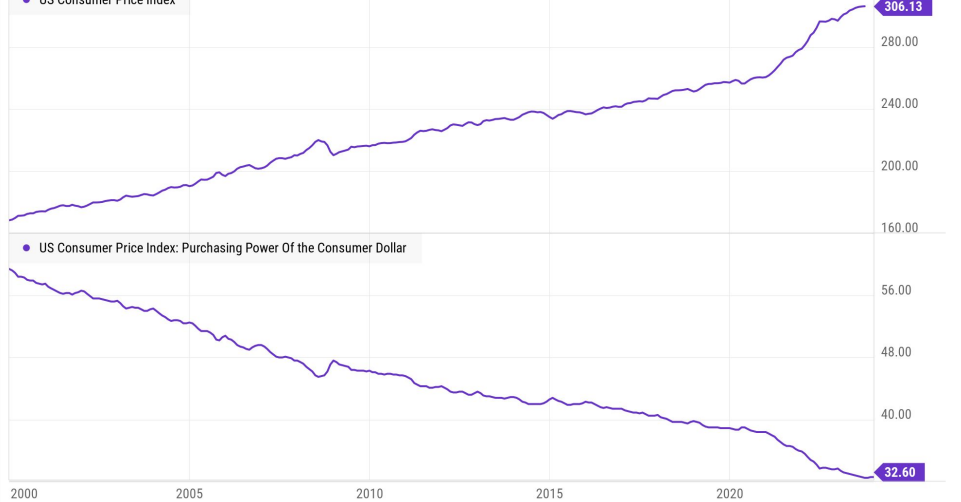


Date Range: 12/31/1999 - 12/31/2023

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- US Consumer Price Index



Date Range: 12/31/1999 - 12/31/2023

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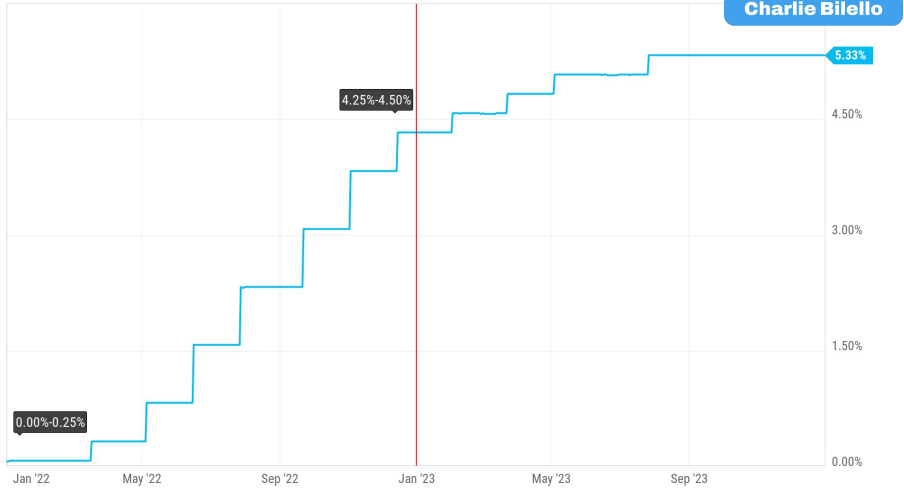
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Fed Rate Hikes



Charlie Bilello

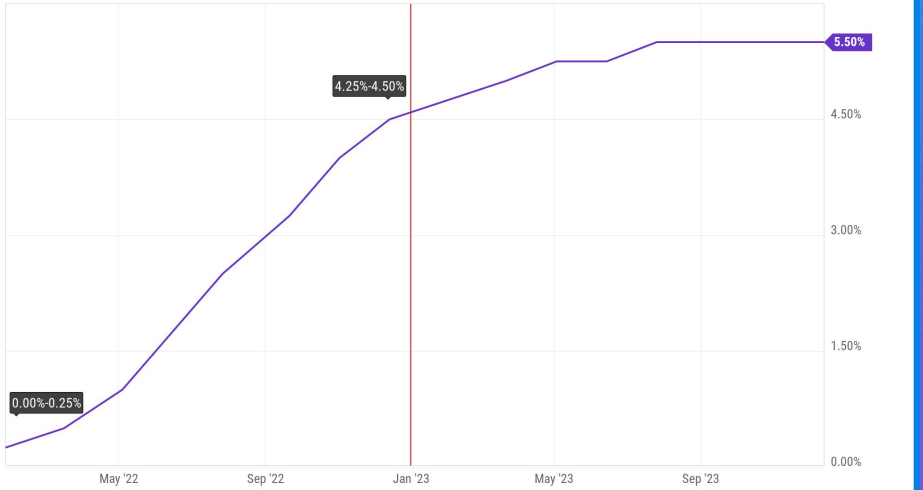
Effective Federal Funds Rate



Date Range: 12/31/2021 - 12/31/2023

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Target Federal Funds Rate Upper Limit



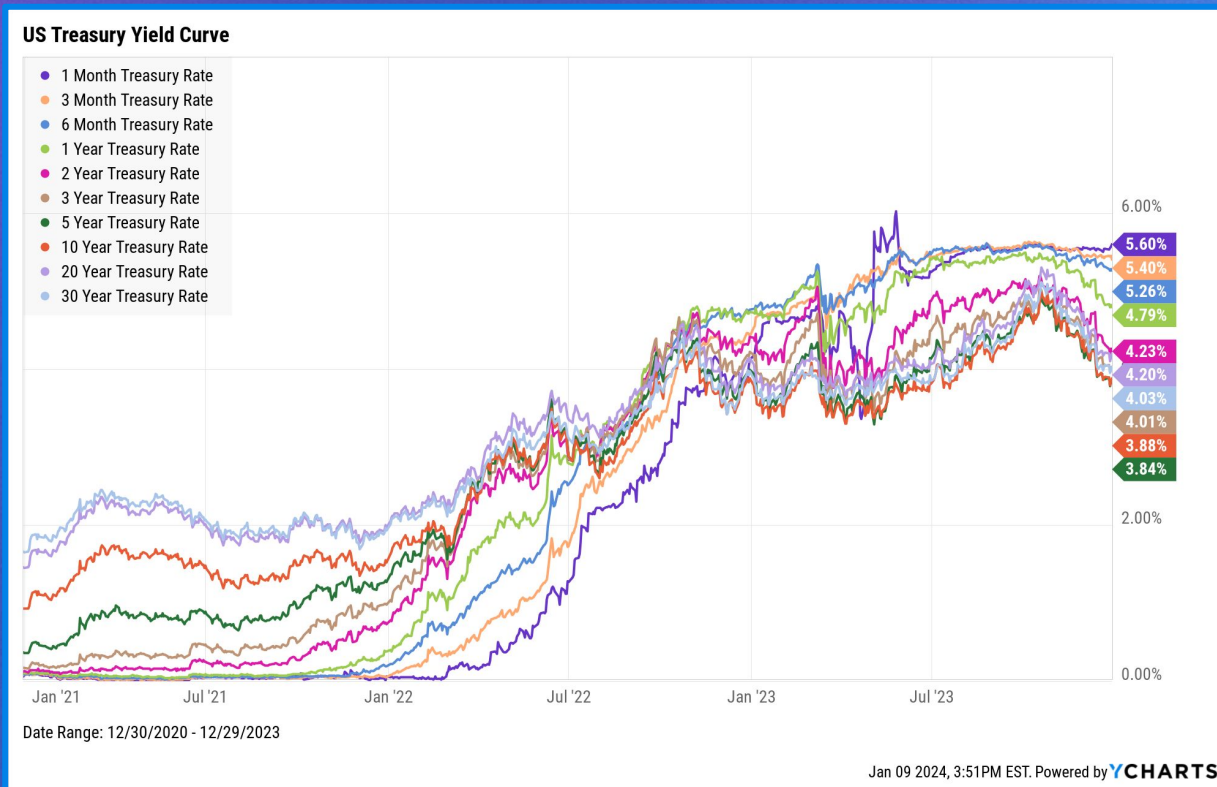
Date Range: 01/26/2022 - 12/13/2023

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The Inversion of the Yield Curve



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10-2 Spread Reaches Lowest Level in 40+ Years

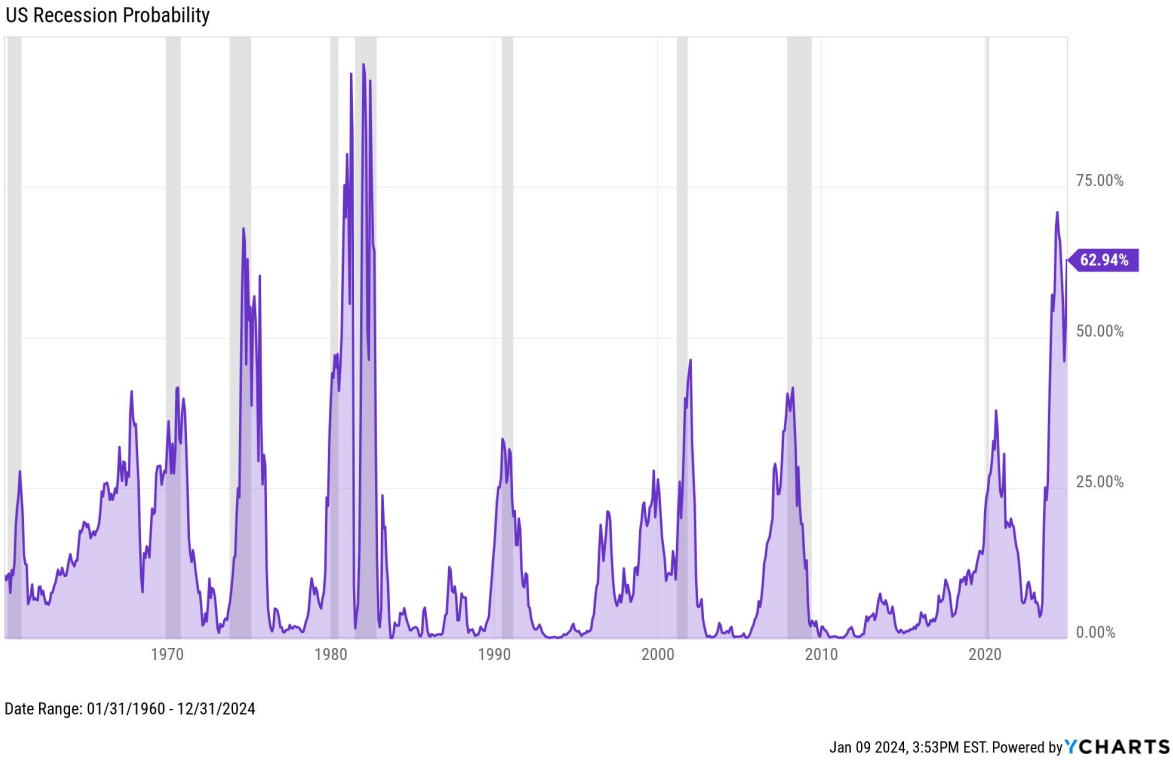


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Recession Probability



Blair duQuesnay

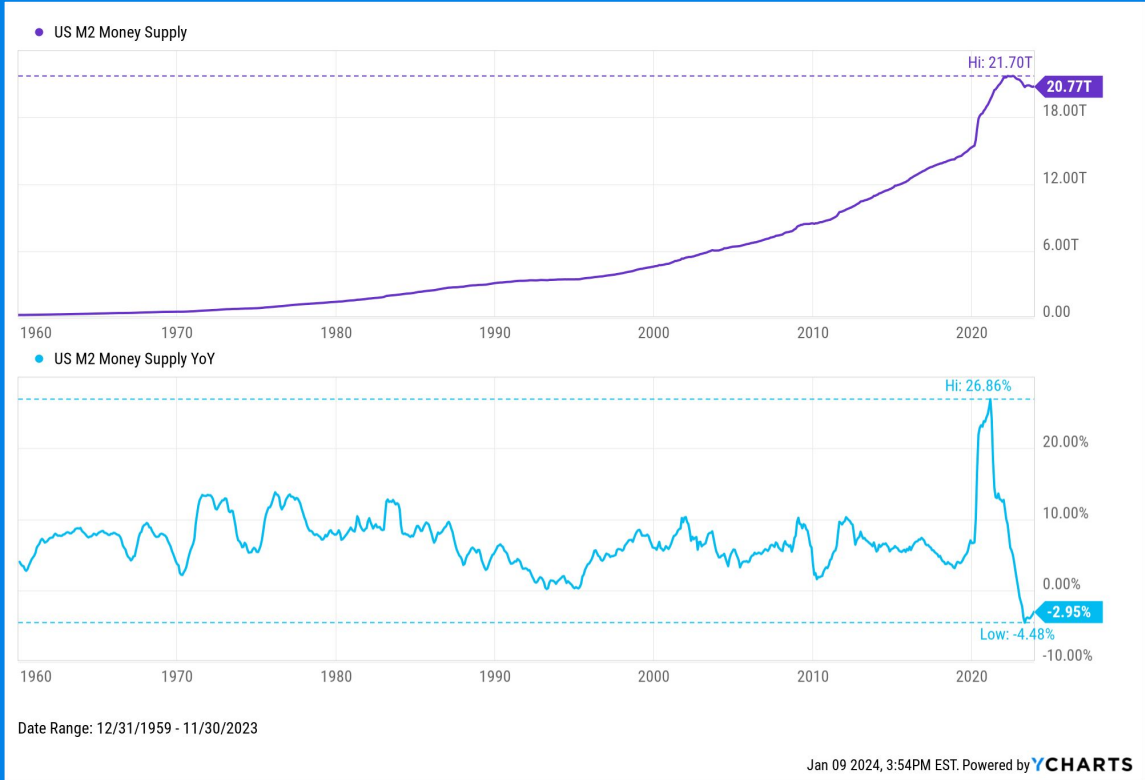


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Reversing the Excesses



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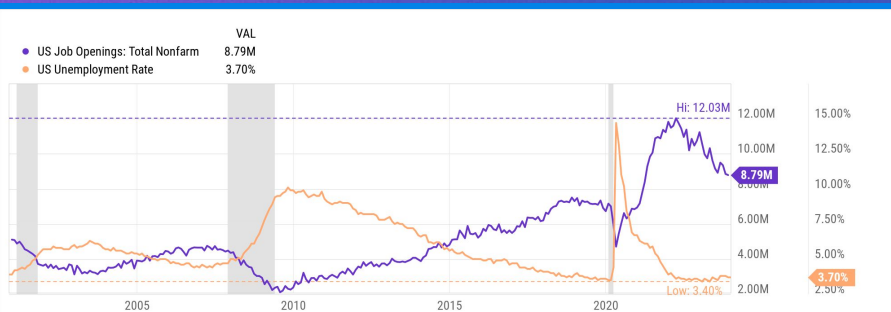
Are Workers Finally Getting Ahead?



Ben Carlson



Michael Batnick

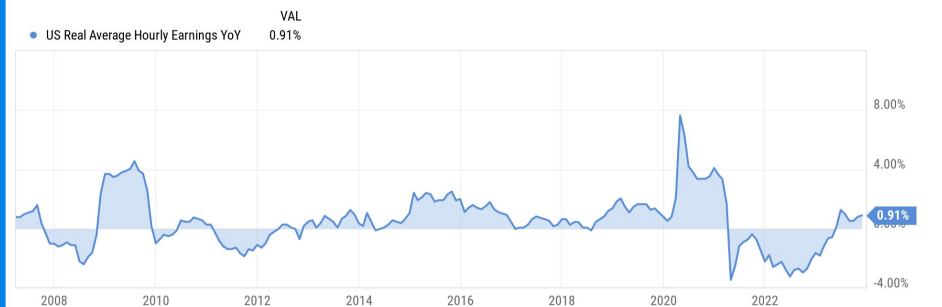
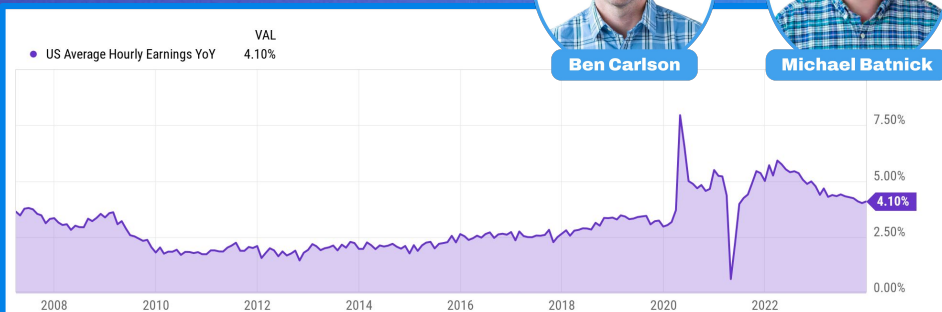


Date Range: 11/30/2000 - 12/31/2023

Gray - US Recessions

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Date Range: 03/31/2007 - 12/31/2023

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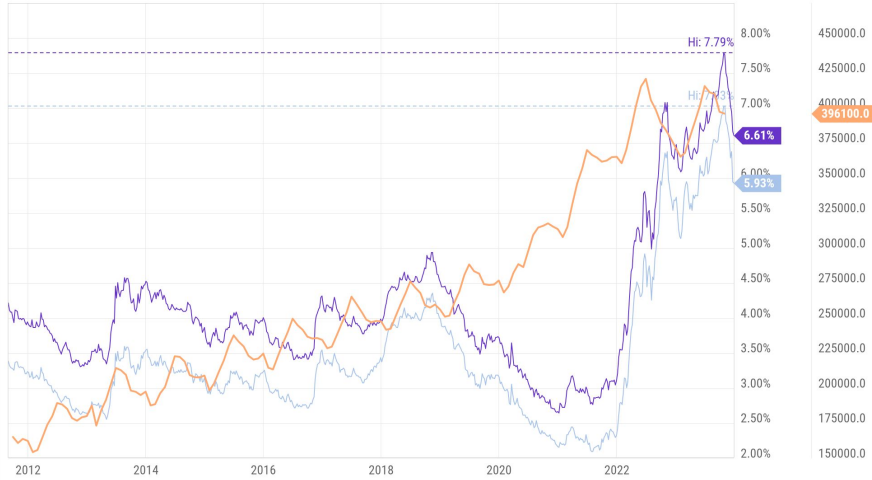
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Housing Market



Stephanie Link

- 15 Year Mortgage Rate
- 30 Year Mortgage Rate
- US Median Price for Existing Single Family Home



Date Range: 09/01/2011 - 12/28/2023

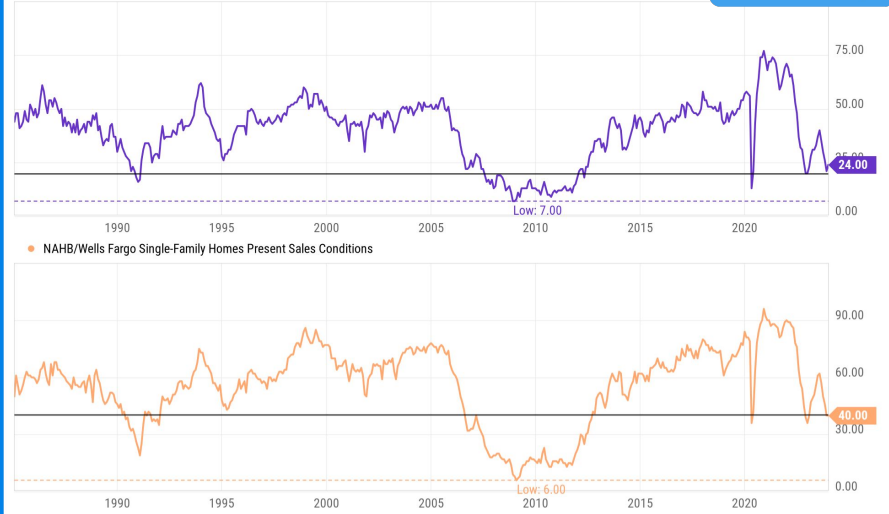
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Brian Portnoy

- NAHB/Wells Fargo Traffic of Prospective Buyers
- NAHB/Wells Fargo Single-Family Homes Present Sales Conditions



Date Range: 01/31/1985 - 12/31/2023

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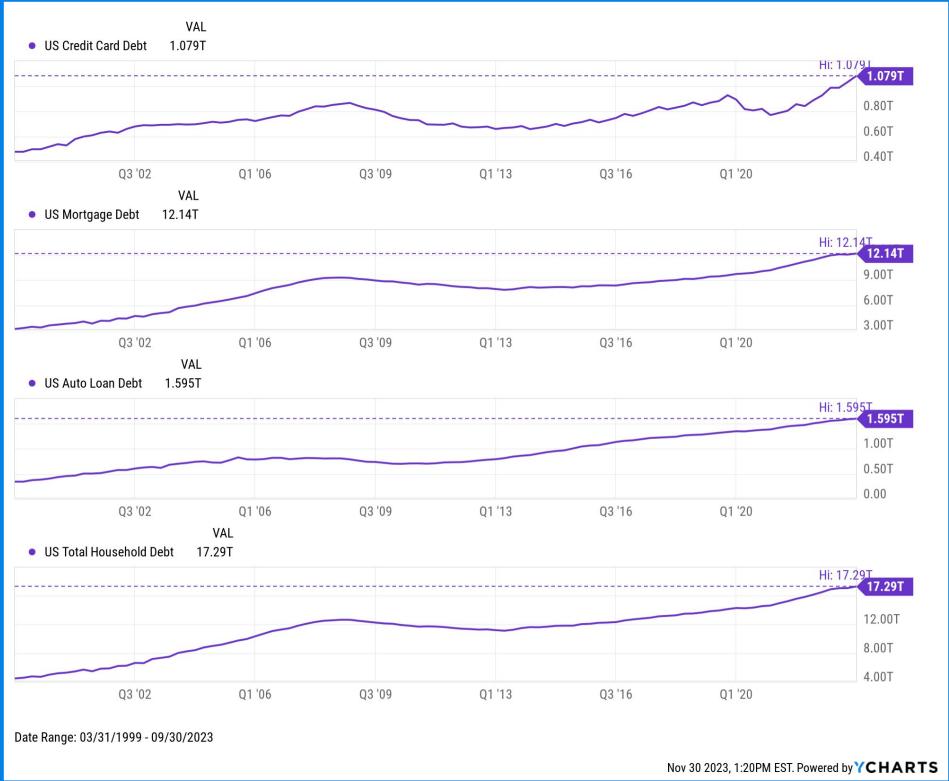
“Charge It!”



Michael Batnick



Ben Carlson

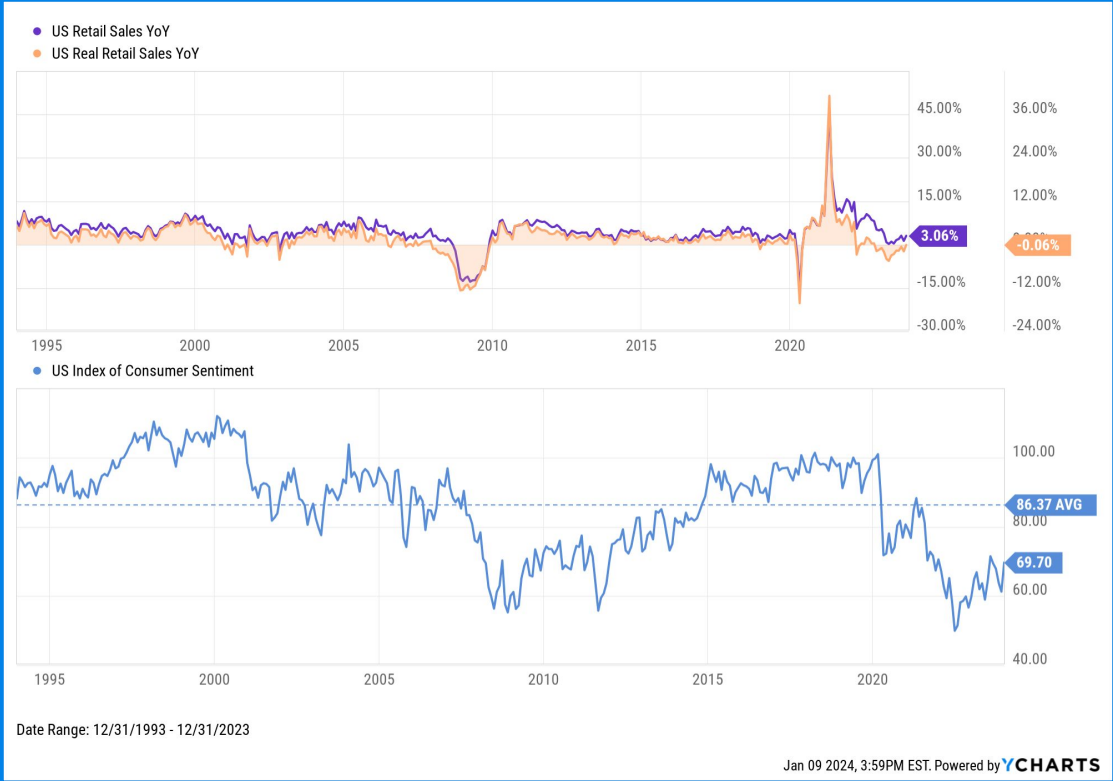


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Consumer Pulling Back

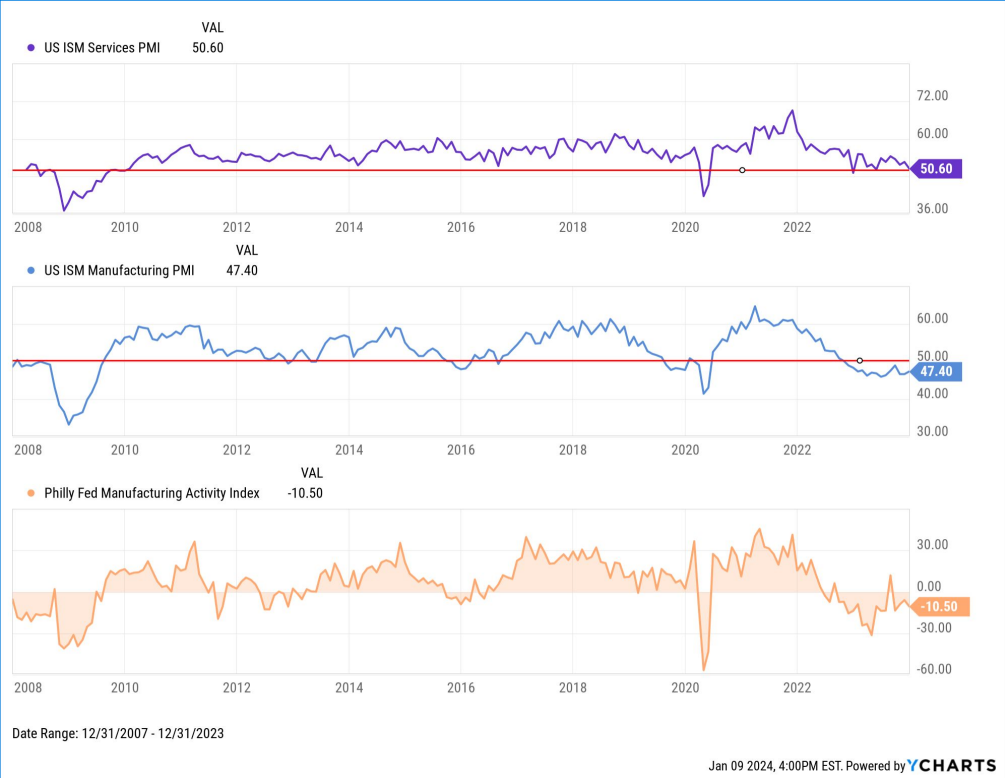


Charlie Bilello



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Manufacturing & Services



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