

Economic Update

A Closer Look at Q4 2024 Data

Released January 2025

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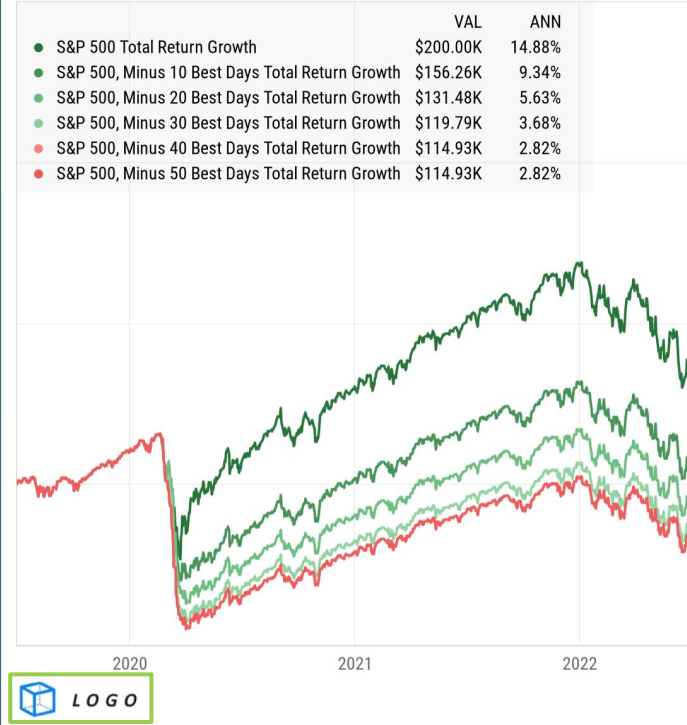
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The Effect of Missing the Best Market Days



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Market Data

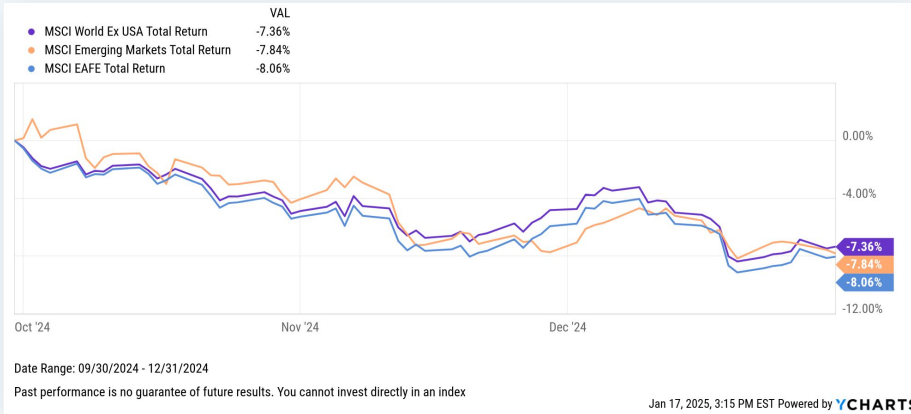
Charts and Tables Highlighting the Performance of Stock Market Indicators and Asset Classes over the Latest Quarter

Key Stock Market Index Performance



US Markets	Q4 2024 Return
Dow Jones Industrial Average Total Return	0.51%
S&P 500 Total Return	2.07%
Nasdaq Composite Total Return	6.17%

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Global Markets	Q4 2024 Return
MSCI World Ex USA Total Return	-7.36%
MSCI Emerging Markets Total Return	-7.84%
MSCI EAFE Total Return	-8.06%

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Key Stock Market Index Performance (cont.)

TTM Index Performance

	VAL
Nasdaq Composite Total Return	29.57%
S&P 500 Total Return	25.02%
Dow Jones Industrial Average Total Return	14.99%
MSCI Emerging Markets Total Return	8.05%
MSCI World Ex USA Total Return	5.26%
MSCI EAFE Total Return	4.35%



Date Range: 12/29/2023 - 12/31/2024

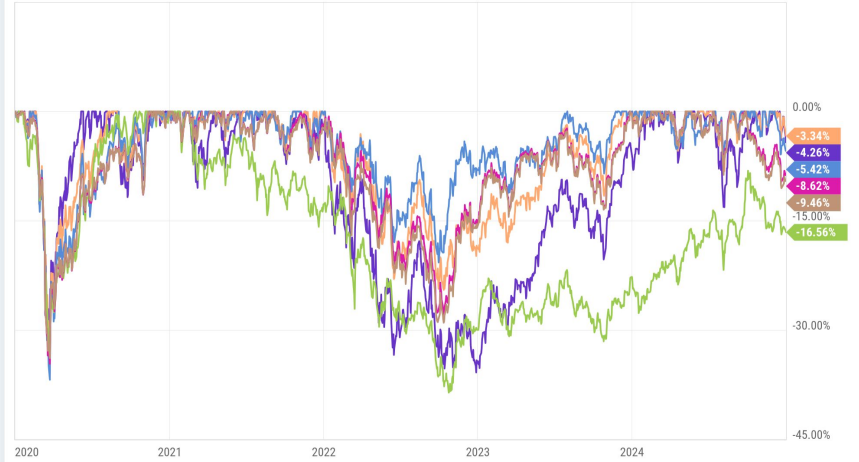
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TTM Index 5Y Drawdowns

	VAL
Nasdaq Composite Total Return % Off High	-4.26%
S&P 500 Total Return % Off High	-3.34%
Dow Jones Industrial Average Total Return % Off High	-5.42%
MSCI Emerging Markets Total Return % Off High	-16.56%
MSCI World Ex USA Total Return % Off High	-8.62%
MSCI EAFE Total Return % Off High	-9.46%



Date Range: 12/31/2019 - 12/31/2024

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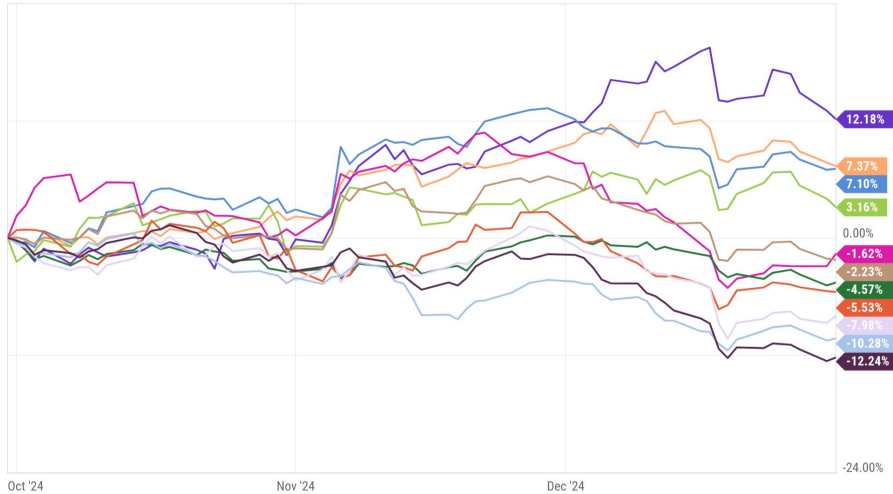
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US Stock Sector Performance

Sector Performance, Q4 2024

	VAL
Consumer Discretionary Select Sector SPDR Fund (XLY) Total Return	12.18%
Communication Services Select Sector SPDR Fund (XLC) Total Return	7.37%
Financial Select Sector SPDR Fund (XLF) Total Return	7.10%
Technology Select Sector SPDR Fund (XLK) Total Return	3.16%
Energy Select Sector SPDR Fund (XLE) Total Return	-1.62%
Industrial Select Sector SPDR Fund (XLI) Total Return	-2.23%
Consumer Staples Select Sector SPDR Fund (XLP) Total Return	-4.57%
Utilities Select Sector SPDR Fund (XLU) Total Return	-5.53%
Real Estate Select Sector SPDR Fund (XLRE) Total Return	-7.98%
Health Care Select Sector SPDR Fund (XLV) Total Return	-10.28%
Materials Select Sector SPDR Fund (XLB) Total Return	-12.24%



Date Range: 09/30/2024 - 12/31/2024

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Sensitive Sectors

Q4 2024
Return

Communication Services Select Sector SPDR® ETF	7.37%
Energy Select Sector SPDR® ETF	-1.62%
Industrial Select Sector SPDR® ETF	-2.23%
Technology Select Sector SPDR® ETF	3.16%

Defensive Sectors

Q4 2024
Return

Consumer Staples Select Sector SPDR® ETF	-4.57%
Health Care Select Sector SPDR® ETF	-10.28%
Utilities Select Sector SPDR® ETF	-5.53%

Cyclical Sectors

Q4 2024
Return

Consumer Discretionary Select Sector SPDR® ETF	12.18%
Financial Select Sector SPDR® ETF	7.10%
Materials Select Sector SPDR® ETF	-12.24%
Real Estate Select Sector SPDR® ETF	-7.98%

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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
US Growth 33.4%	Commodities 3.3%	US Growth 7.1%	US Growth 10.5%	US Growth 33.4%	US Growth 10.5%	US Growth 19.0%	US Growth 16.8%
S&P 500 25.0%	US Growth 0.9%	Commodities 3.8%	US Small 9.6%	S&P 500 25.0%	Commodities 9.6%	S&P 500 14.5%	S&P 500 13.1%
US Value 14.4%	Emerging Markets -0.1%	S&P 500 2.4%	S&P 500 8.4%	US Value 14.4%	S&P 500 8.9%	US Value 8.7%	US Value 8.5%
US Small 11.5%	Muni Bonds -1.5%	US Small 0.3%	US Real Estate 8.0%	US Small 11.5%	US Value 5.6%	US Small 7.4%	US Small 7.8%
Commodities 9.2%	US Treasuries -1.5%	Muni Bonds -1.2%	US Value 7.3%	Commodities 9.2%	World exUSA 2.5%	Commodities 7.1%	World exUSA 5.8%
Emerging Markets 8.1%	Aggregate Bonds -1.6%	US Value -2.0%	Aggregate Bonds 2.0%	Emerging Markets 8.1%	US Small 1.2%	World exUSA 5.6%	US Real Estate 5.6%
World exUSA 5.3%	S&P 500 -2.4%	Aggregate Bonds -3.1%	Muni Bonds 1.5%	World exUSA 5.3%	Muni Bonds -0.6%	US Real Estate 3.0%	Emerging Markets 4.0%
US Real Estate 4.9%	World exUSA -2.7%	US Treasuries -3.1%	US Treasuries 1.5%	US Real Estate 4.9%	Emerging Markets -1.5%	Emerging Markets 2.1%	Muni Bonds 2.3%
Aggregate Bonds 1.3%	US Value -6.8%	World exUSA -7.4%	Emerging Markets 0.3%	Aggregate Bonds 1.3%	Aggregate Bonds -2.4%	Muni Bonds 1.0%	Aggregate Bonds 1.3%
Muni Bonds 1.1%	US Real Estate -8.2%	US Real Estate -7.8%	World exUSA -0.1%	Muni Bonds 1.1%	US Treasuries -2.9%	Aggregate Bonds -0.3%	Commodities 1.2%
US Treasuries 0.6%	US Small -8.3%	Emerging Markets -7.8%	Commodities -1.7%	US Treasuries 0.6%	US Real Estate -4.1%	US Treasuries -0.7%	US Treasuries 0.8%

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

Asset Class Performance – Quarter by Quarter

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	6/30/2021 Qtr Return
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 15.7%
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 Growth 11.9%
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%	US Real Estate 11.7%
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%	S&P 500 8.5%
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%	World exUSA 5.9%
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 5.2%
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%	Emerging Markets 5.1%
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%	US Small 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%	Aggregate Bonds 1.8%
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 Treasuries 1.7%
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%	Muni Bonds 1.4%

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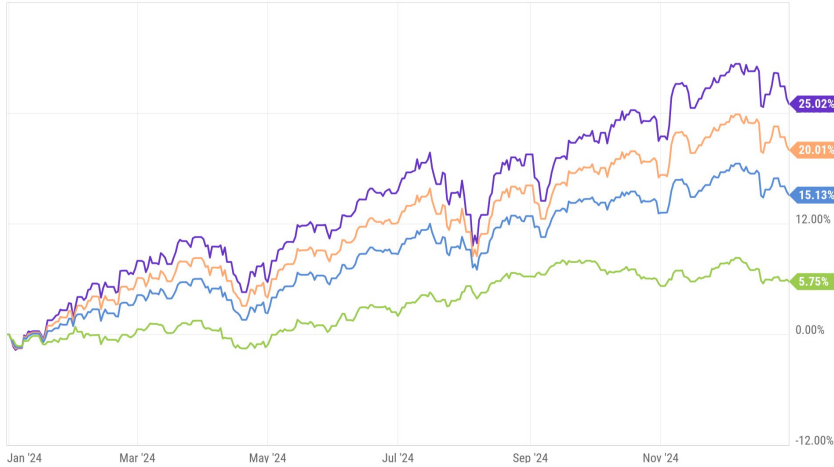
*Data as of 12/31/2024

Contact support@ycharts.com to access these asset class performance heatmaps

Performance of Diversified Portfolios

TTM Allocation Performance

	VAL
All Equity Benchmark Total Return	25.02%
80/20 Benchmark Total Return	20.01%
60/40 Benchmark Total Return	15.13%
20/80 Benchmark Total Return	5.75%



Date Range: 12/31/2023 - 12/31/2024

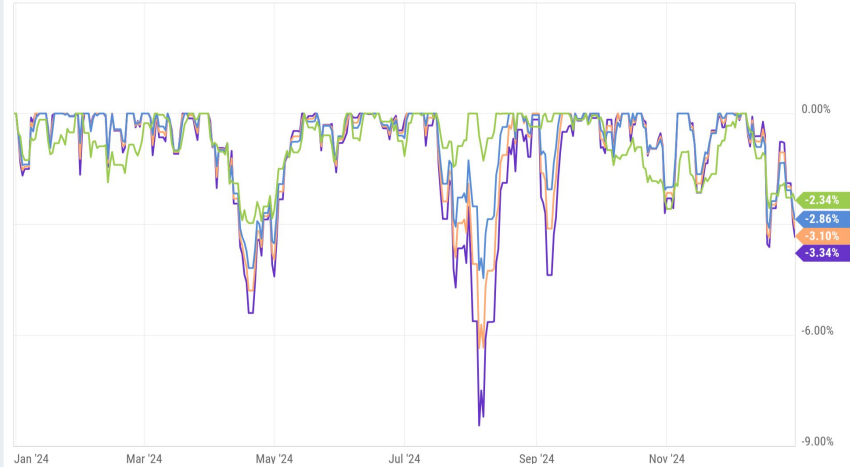
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TTM Allocation Drawdowns

	VAL
All Equity Benchmark Total Return % Off High	-3.34%
80/20 Benchmark Total Return % Off High	-3.10%
60/40 Benchmark Total Return % Off High	-2.86%
20/80 Benchmark Total Return % Off High	-2.34%



Date Range: 12/31/2023 - 12/31/2024

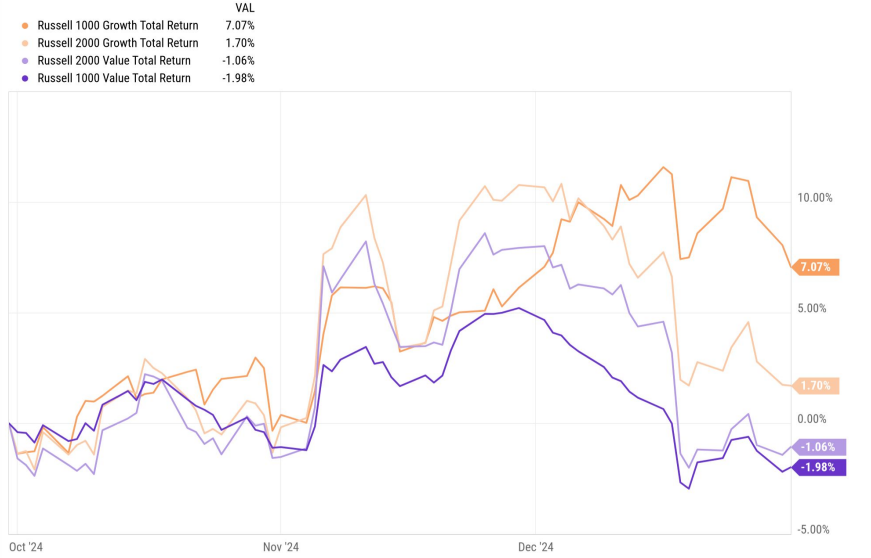
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Equity Style Performance

Value vs. Growth Performance, Q4



Date Range: 09/30/2024 - 12/31/2024

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Large Cap vs. Small Cap, Q4



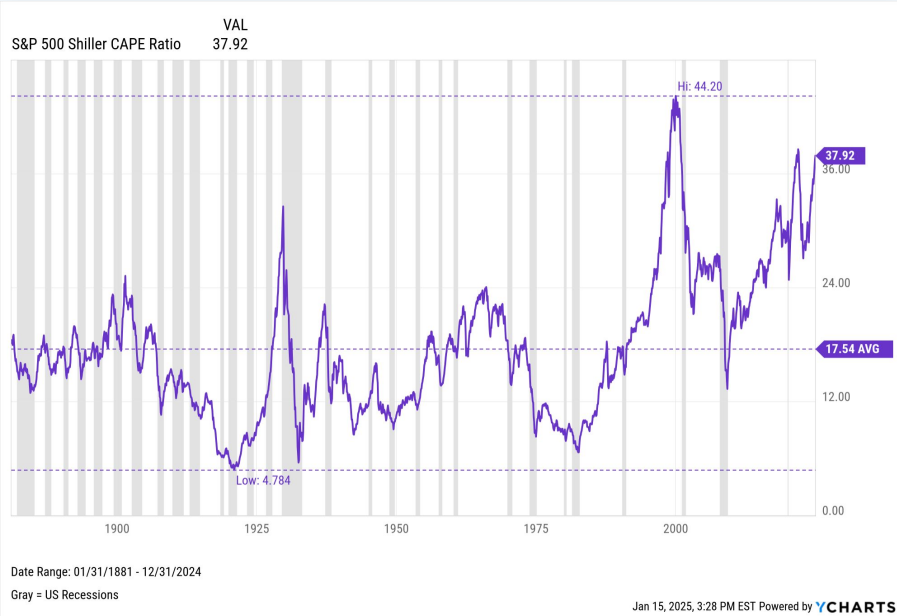
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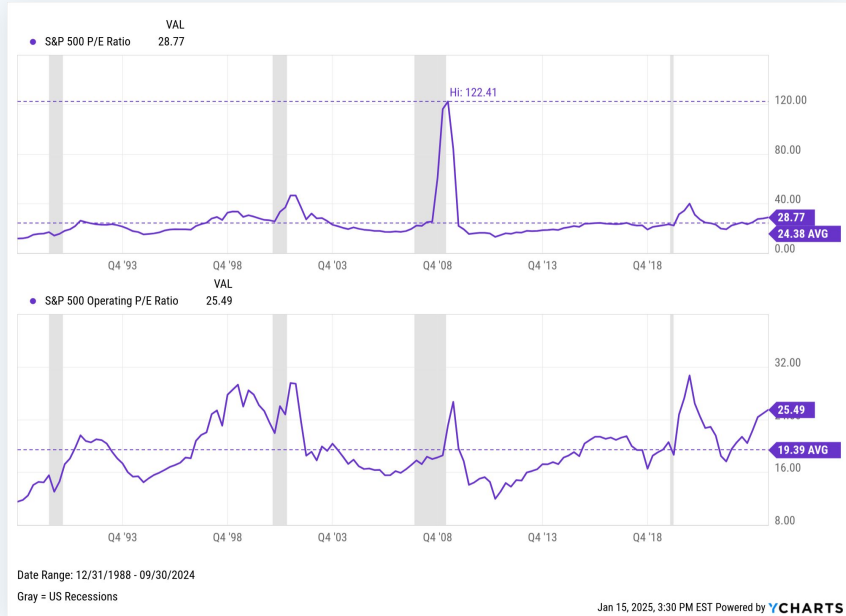
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S&P 500 Valuation Measures



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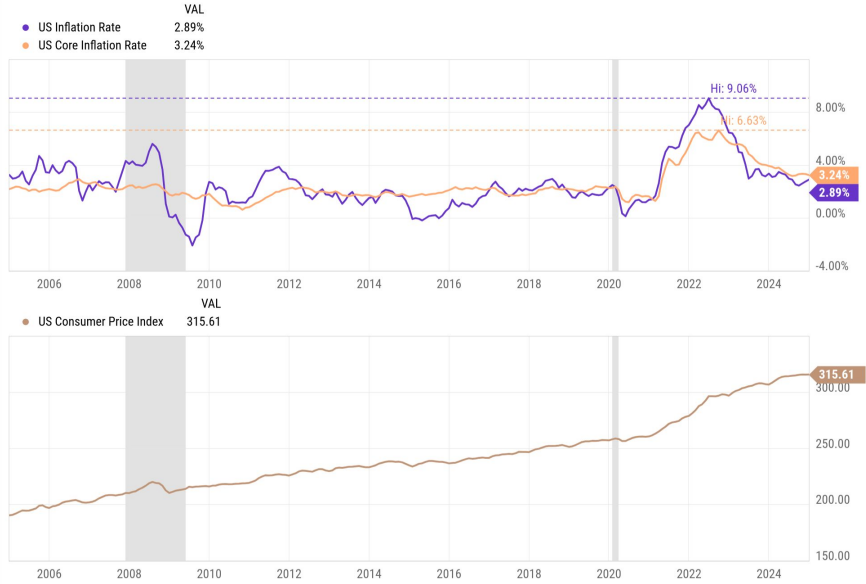


Macroeconomic Data

Leading and Lagging Economic Data
and Trends from Key Economic Reports
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Inflation & Wage Growth

Inflation and CPI

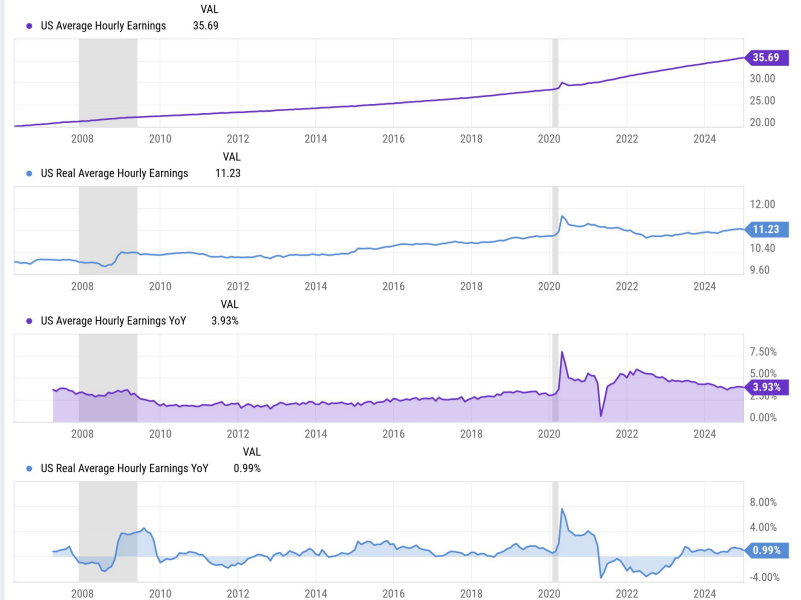


Date Range: 12/31/2004 - 12/31/2024
 Gray = US Recessions

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Wage Growth

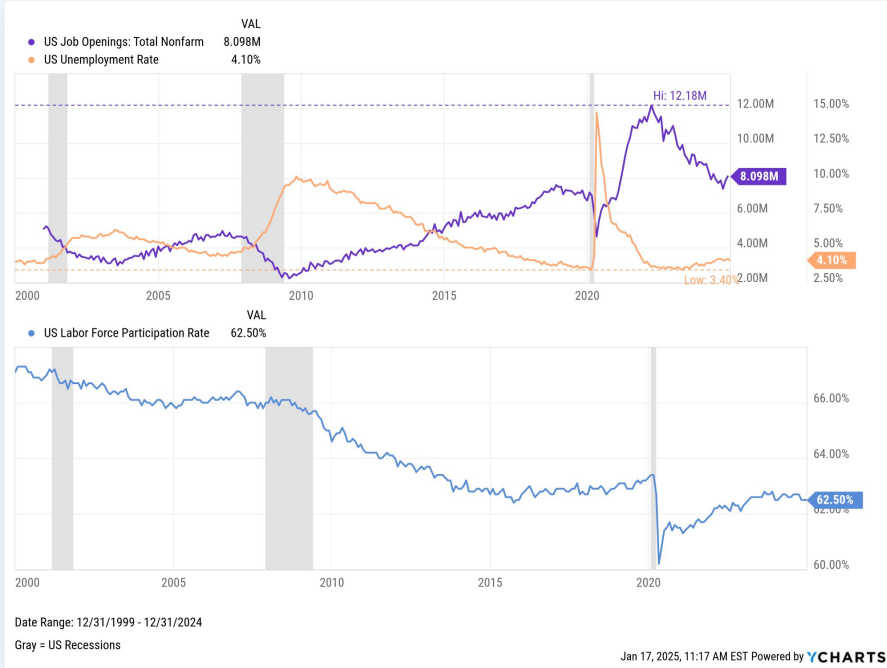


Date Range: 03/31/2006 - 12/31/2024
 Gray = US Recessions

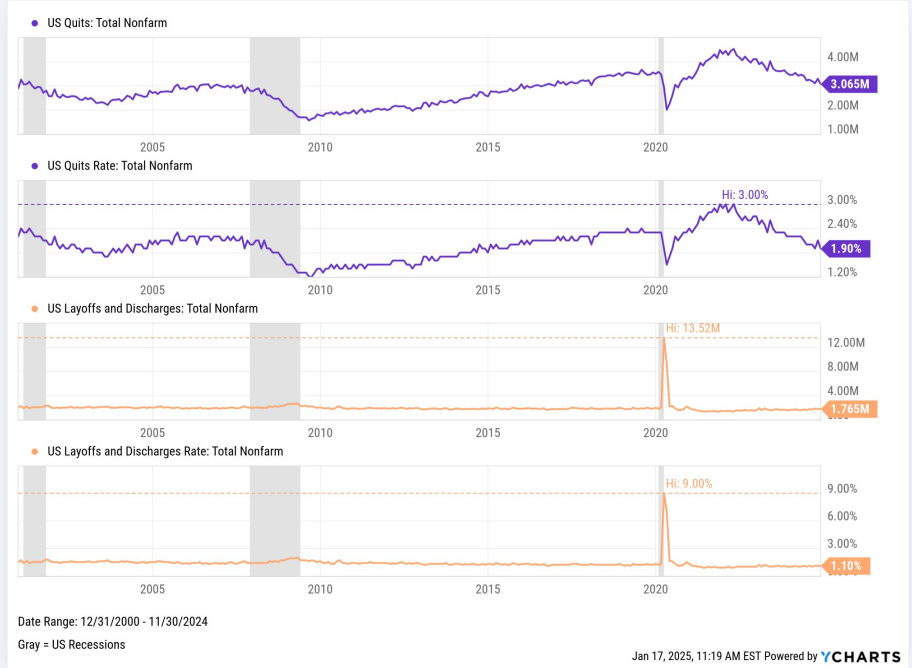
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Employment



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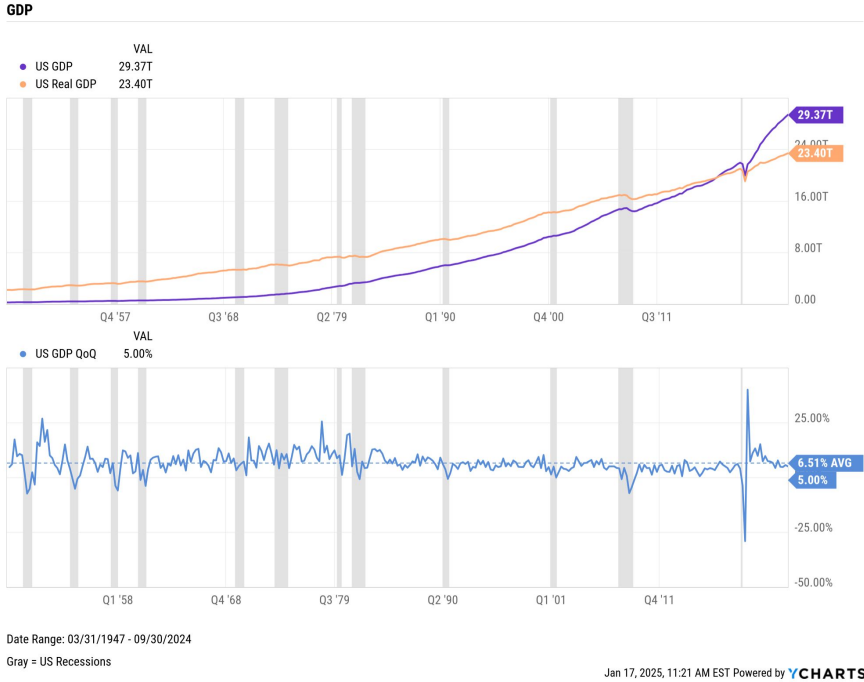
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Leading Indicator Data and Trends

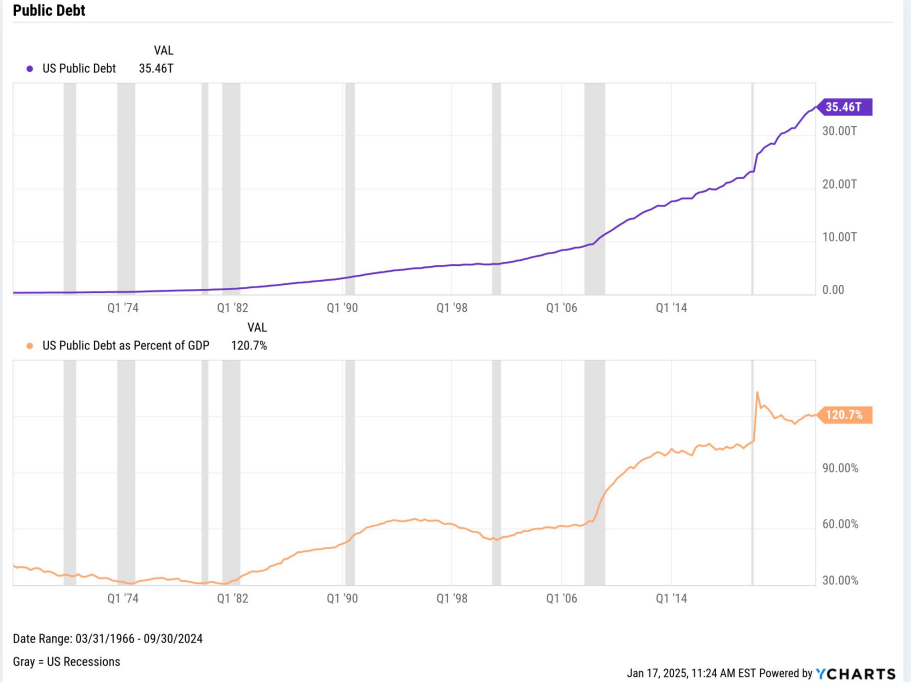
Indicator	Q4 2024	Q3 2024	Q2 2024	Q1 2024	2024	2023	2022	2021	2020	2019	2018	2017	2016	2015	2014	2013
10-2 Year Treasury Yield Spread	▲ 0.33%	▲ 0.15%	▼ -0.35%	▼ -0.39%	▲ 0.33%	▼ -0.35%	▼ -0.53%	▲ 0.79%	▲ 0.80%	▲ 0.34%	▼ 0.21%	▼ 0.51%	▲ 1.25%	▼ 1.21%	▼ 1.50%	▲ 2.66%
NY Fed Business Leaders Survey Current Business Activity	▼ -5.2	▲ 0.5	▼ -4.7	▲ 0.6	▲ -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	▼ -10.9	▲ 0.9	▼ 0.5	▲ 4.9	▼ -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	▼ 2.41%	▲ 5.89%	▼ 4.28%	▼ 10.56%	▼ 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	▲ 74.0	▲ 70.1	▼ 68.2	▲ 79.4	▲ 74	▲ 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)	▲ 2.62%	▲ 2.13%	▲ 2.02%	▲ 0.59%	▲ 2.62%	▼ 0.20%	▼ 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)	▼ 16.375	▼ 16.681	▼ 16.826	▲ 17.171	▼ 16.375	▼ 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)	▼ 17.545	▼ 17.722	▼ 18.015	▲ 18.217	▼ 17.545	▼ 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)	▲ 4.17%	▲ 1.80%	▼ 1.67%	▼ 3.29%	▼ 4.17%	▲ 4.33%	▼ 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

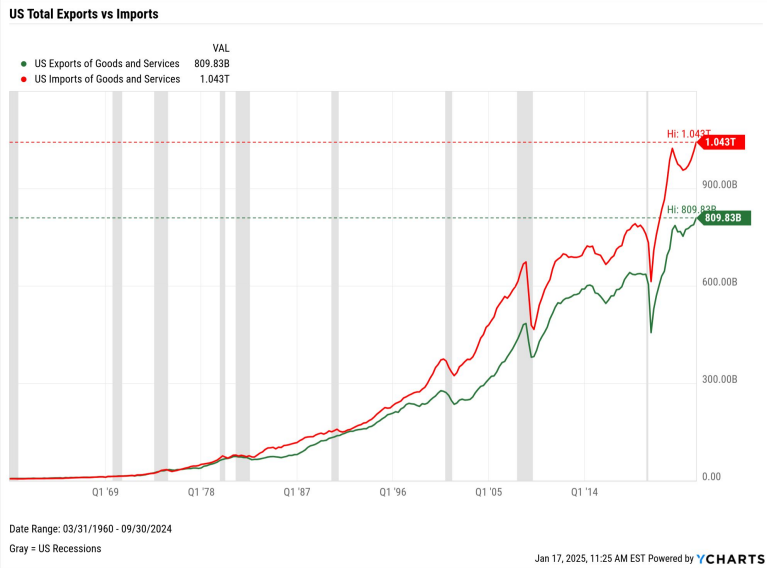


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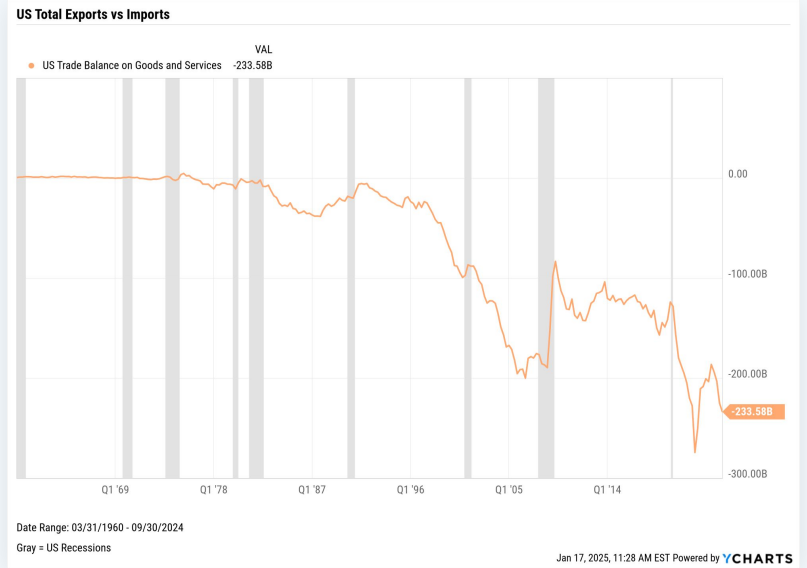


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US Trade Balance



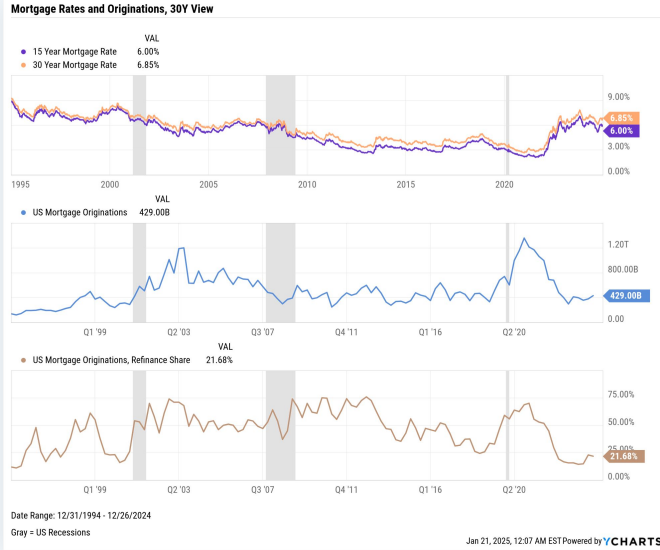
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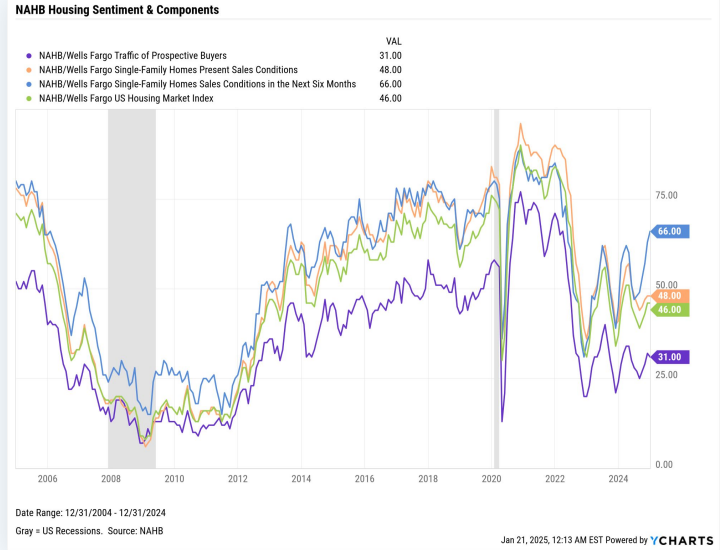
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	Exports														
	Total	QoQ	YoY	Canada	QoQ	YoY	Mexico	QoQ	YoY	EU	QoQ	YoY	China	QoQ	YoY
Total:	\$809.8 B	2.8%	4.9%	\$109.2 B	-0.2%	-0.2%	\$97.1 B	0.8%	5.0%	\$169.0 B	5.8%	3.3%	\$50.3 B	0.3%	6.7%
Goods:	\$530.0 B	3%	3%	\$85.4 B	-1%	-3%	\$84.9 B	1%	4%	\$97.1 B	7%	0%	\$36.2 B	-1%	2%
Services:	\$279.9 B	3%	8%	\$23.8 B	5%	11%	\$12.2 B	0%	8%	\$71.8 B	3%	8%	\$14.1 B	4%	17%
	Imports														
	Total	QoQ	YoY	Canada	QoQ	YoY	Mexico	QoQ	YoY	EU	QoQ	YoY	China	QoQ	YoY
Total:	\$1,043.4 B	3.0%	9.5%	\$118.6 B	4.1%	9.3%	\$141.7 B	2.5%	7.2%	\$209.0 B	3.7%	9.9%	\$120.6 B	10.1%	10.9%
Goods:	\$837.2 B	3%	8%	\$104.4 B	4%	8%	\$130.8 B	3%	7%	\$156.9 B	4%	8%	\$114.9 B	10%	10%
Services:	\$206.2 B	3%	10%	\$14.2 B	2%	12%	\$10.9 B	-3%	0%	\$52.1 B	2%	12%	\$5.7 B	2%	14%

US Housing Market Data



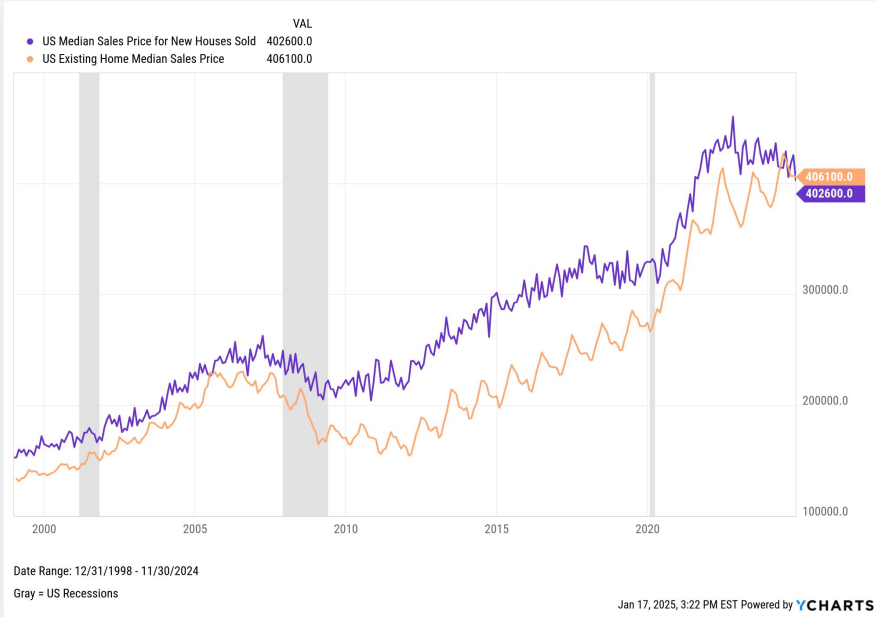
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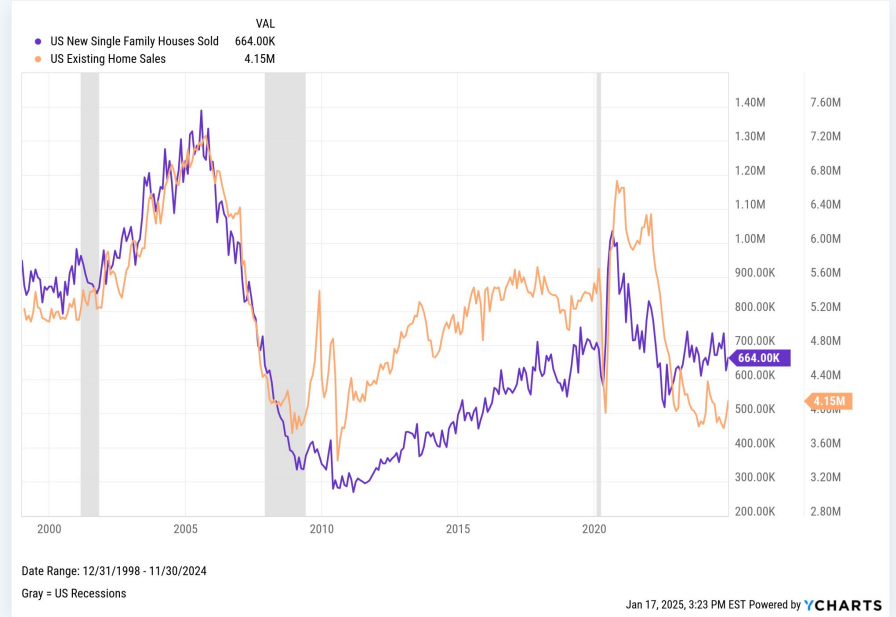
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Housing Indicator Review										
Overall	Indicator Name	Latest Period	Frequency	Value	1 Mo. Ago		3 Mo. Ago		1 Yr. Ago	
					1 Mo. Ago	% Change	3 Mo. Ago	% Change	1 Yr. Ago	% Change
▲	Case-Shiller Home Price Index: National	10/31/2024	monthly	324.5	323	▲ 0.35%	322	▲ 0.87%	313	▲ 3.62%
▲	US Housing Starts	12/31/2024	monthly	1,499	1,294	▲ 15.84%	1,355	▲ 10.63%	1,568	▼ -4.40%
▼	US Building Permits	12/31/2024	monthly	1,483	1,493	▼ -0.67%	1,425	▲ 4.07%	1,530	▼ -3.07%
▲	US New Single Family Houses Sold	11/30/2024	monthly	664	627	▲ 5.90%	691	▼ -3.91%	611	▲ 8.67%
▲	US Pending Home Sales Index	11/30/2024	monthly	79	77	▲ 2.20%	71	▲ 11.90%	74	▲ 6.90%
▲	30 Year Mortgage Rate	12/31/2024	weekly	6.85%	6.81%	▲ 0.59%	6.08%	▲ 12.66%	6.61%	▲ 3.63%
▲	US Households	9/30/2024	monthly	132,508	132,150	▲ 0.27%	131,528	▲ 0.75%	130,593	▲ 1.47%

US Housing Market Data (cont.)



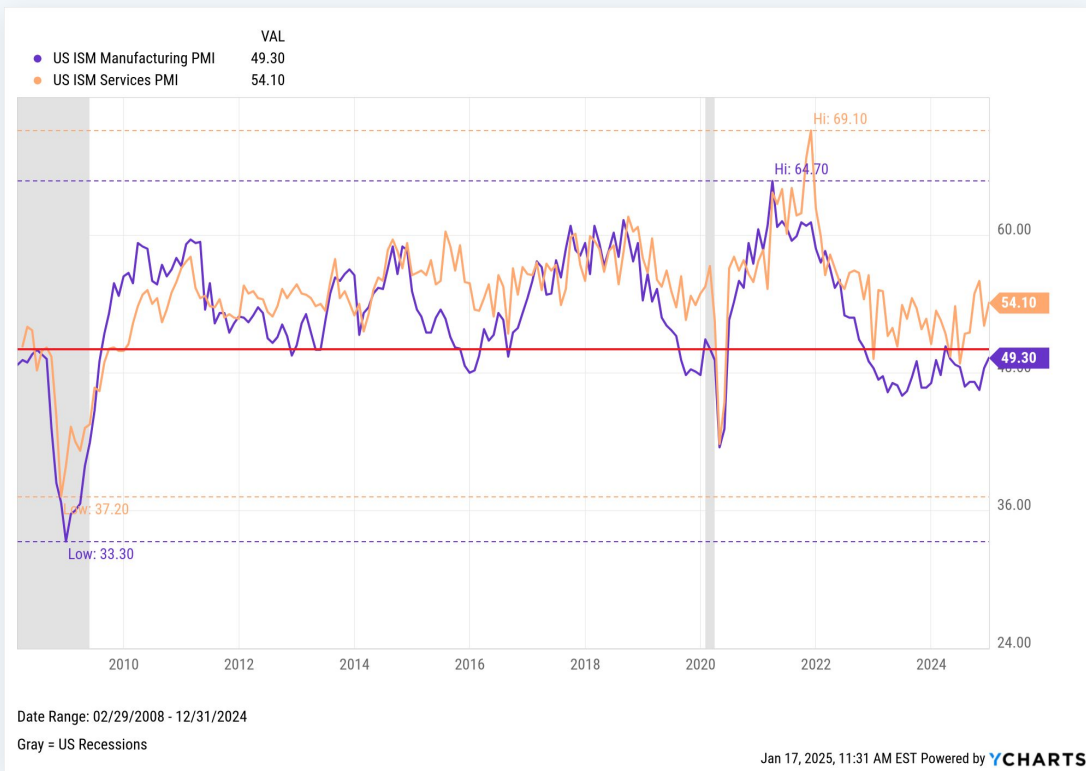
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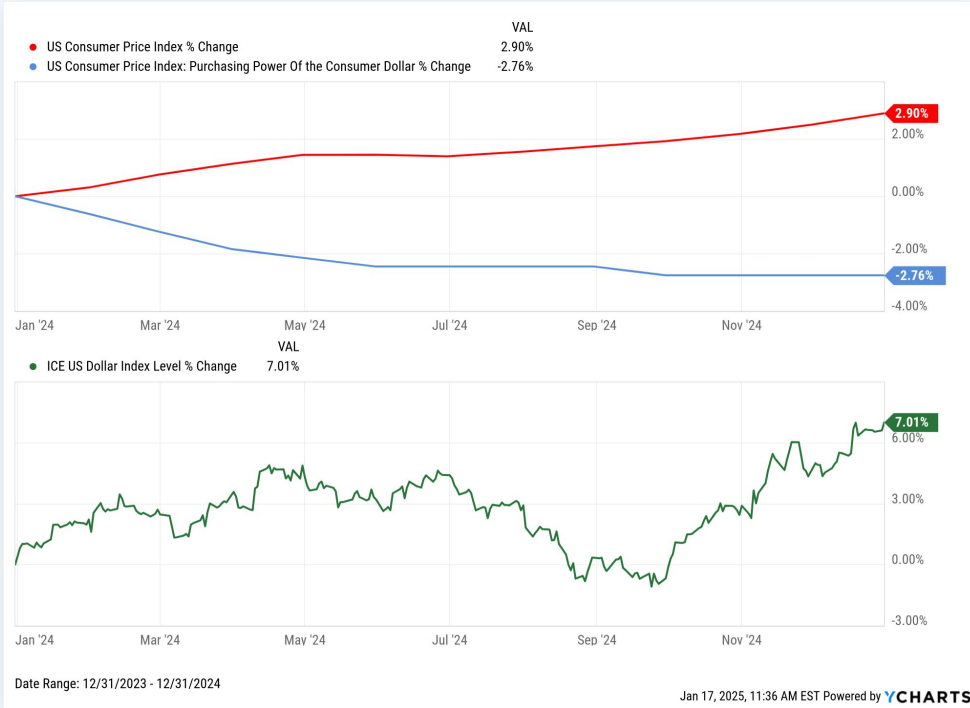


Manufacturing & Services

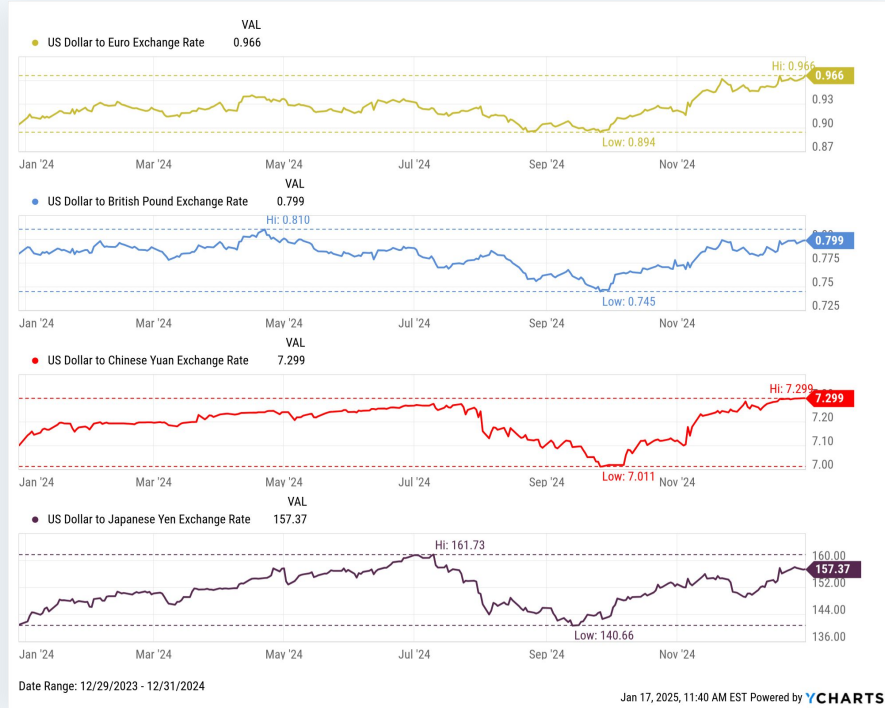


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US Dollar Strength



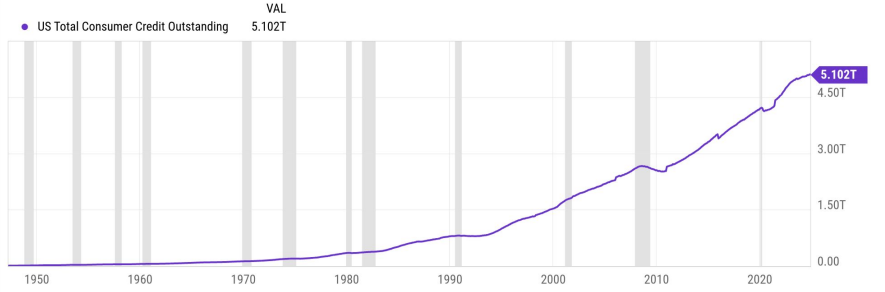
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Consumers

Consumer Savings and Credit



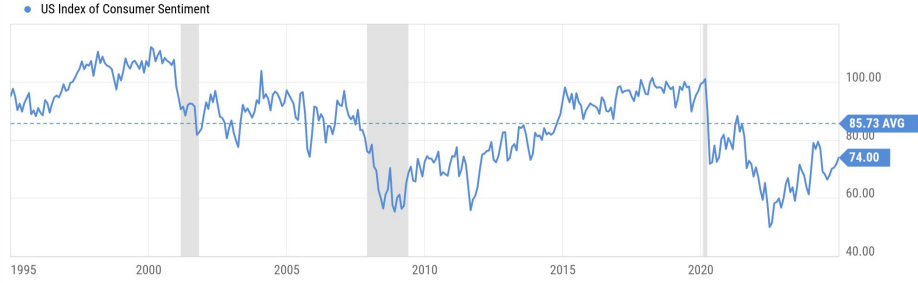
Date Range: 03/31/1947 - 11/30/2024

Gray = US Recessions

Jan 17, 2025, 11:45 AM EST Powered by YCHARTS

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Sales and Consumer Sentiment



Date Range: 12/31/1994 - 12/31/2024

Gray = US Recessions

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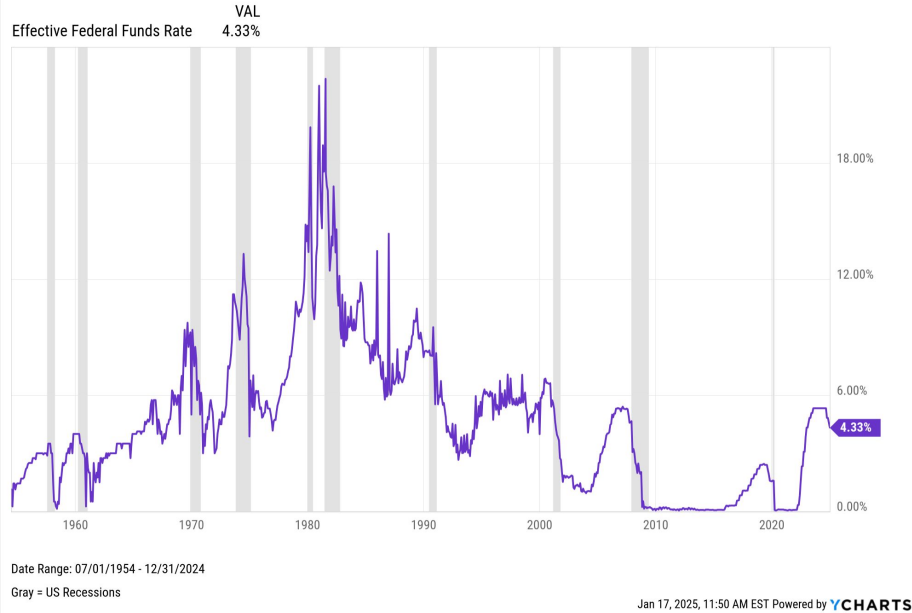
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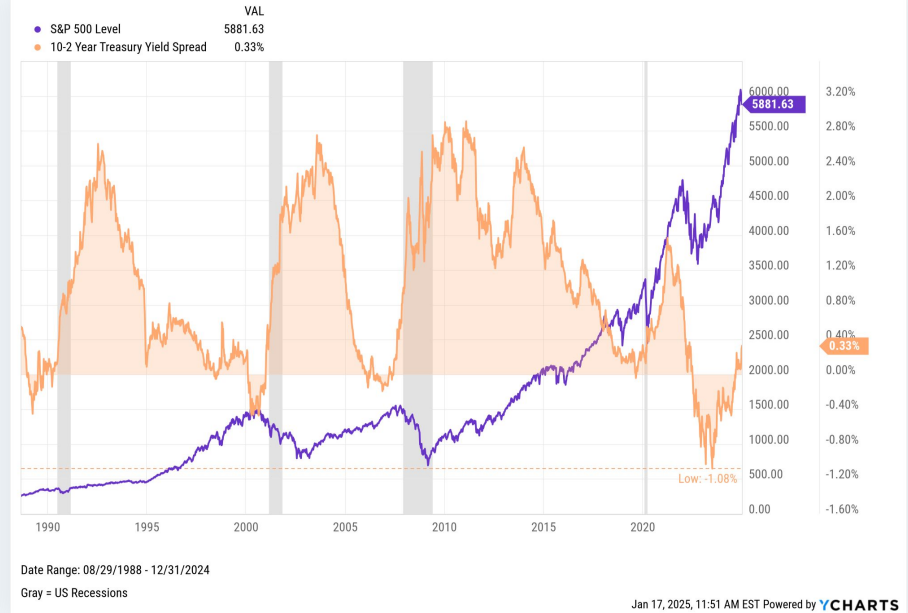
Bonds & Interest Rates

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

Interest Rates & Spreads



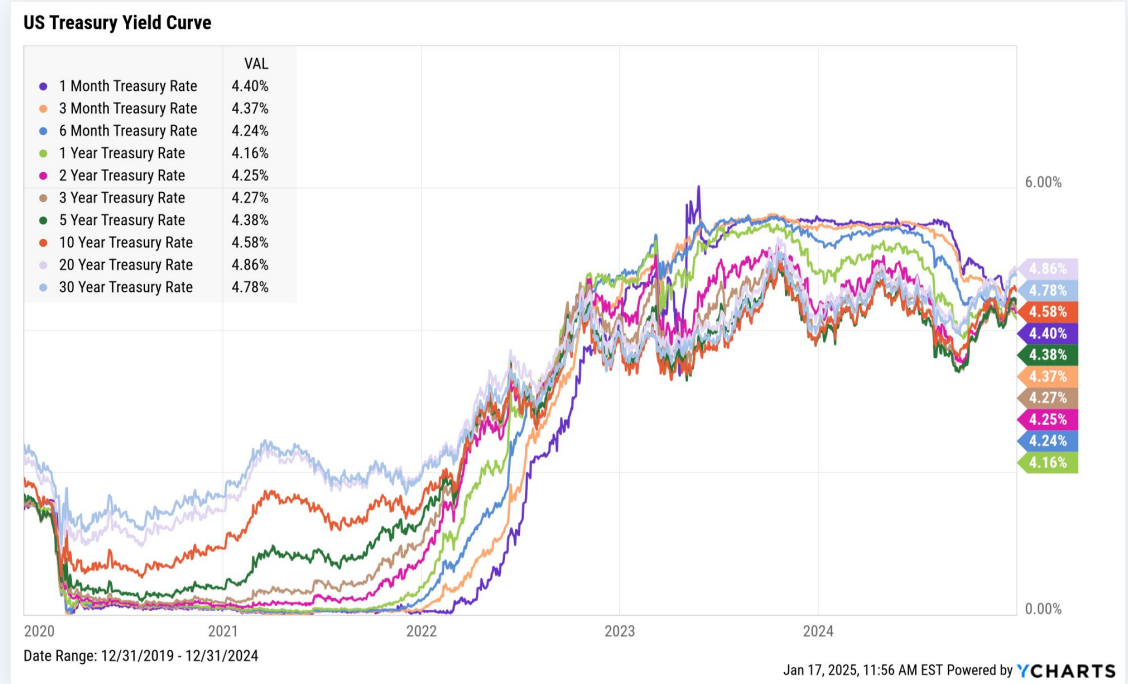
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Treasury Yield Curve

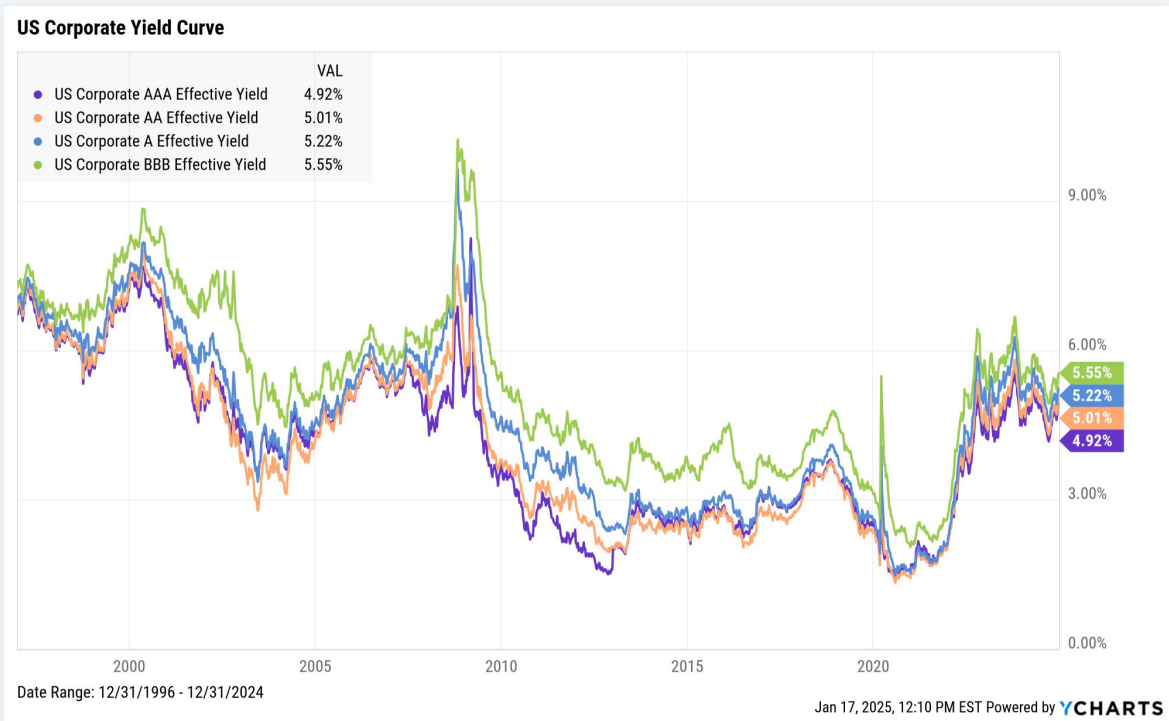
Duration	Rate	QoQ Δ
1-Month	4.40%	▼ 53 bps
3-Month	4.37%	▼ 36 bps
6-Month	4.24%	▼ 14 bps
1-Year	4.16%	▲ 18 bps
2-Year	4.25%	▲ 59 bps
3-Year	4.27%	▲ 69 bps
5-Year	4.38%	▲ 80 bps
10-Year	4.58%	▲ 77 bps
20-Year	4.86%	▲ 67 bps
30-Year	4.78%	▲ 64 bps



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Corporate Yields

Type	Rate	QoQ Δ
AAA	4.92%	▲ 68 bps
AA	5.01%	▲ 64 bps
A	5.22%	▲ 59 bps
BBB	5.55%	▲ 58 bps



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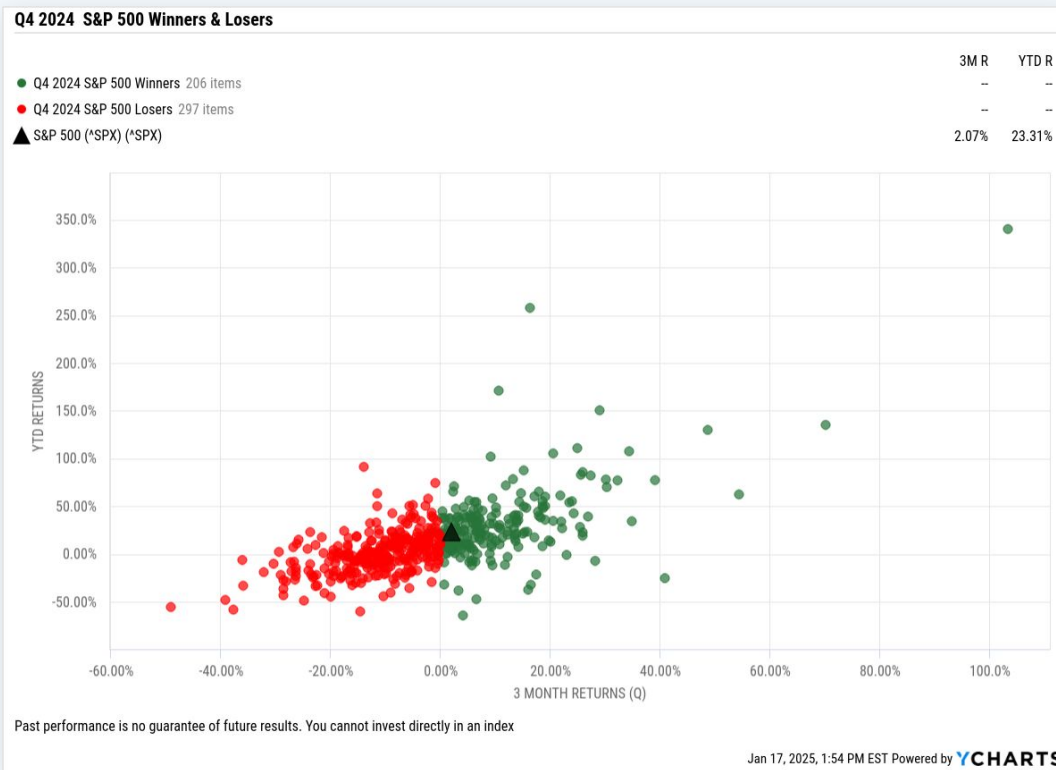


Charts of the Moment

Visuals Depicting Trends that are Impacting the Markets and Investments



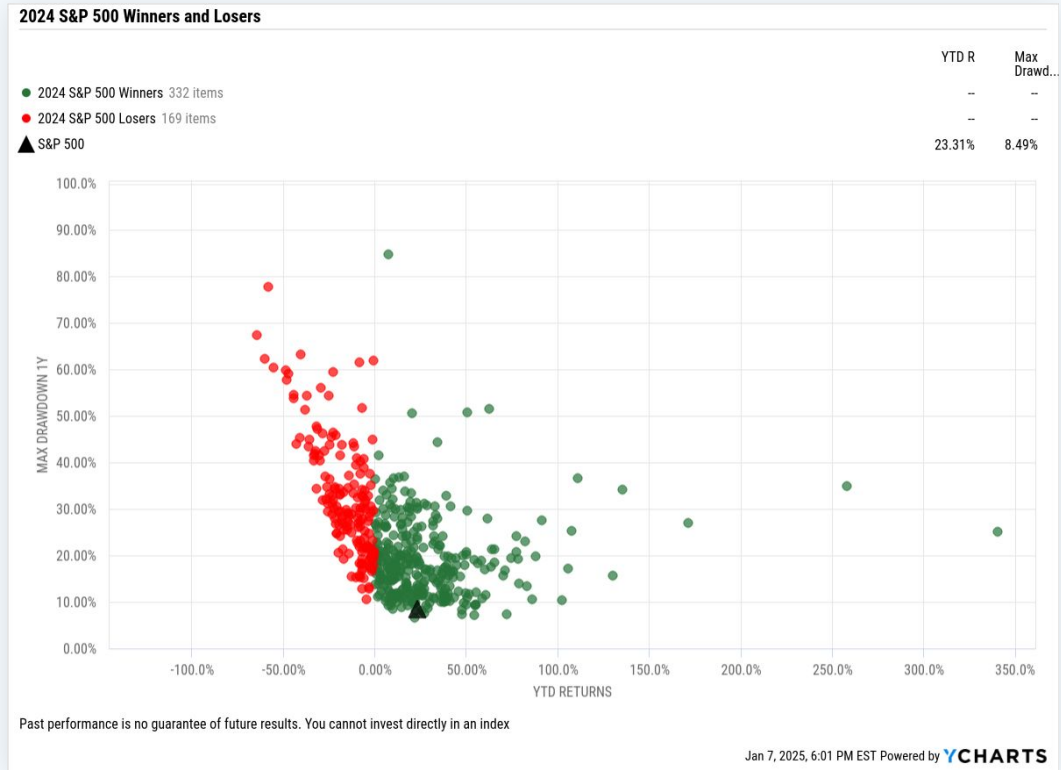
Q4 S&P 500 Winners & Losers



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2024 S&P 500 Winners & Losers



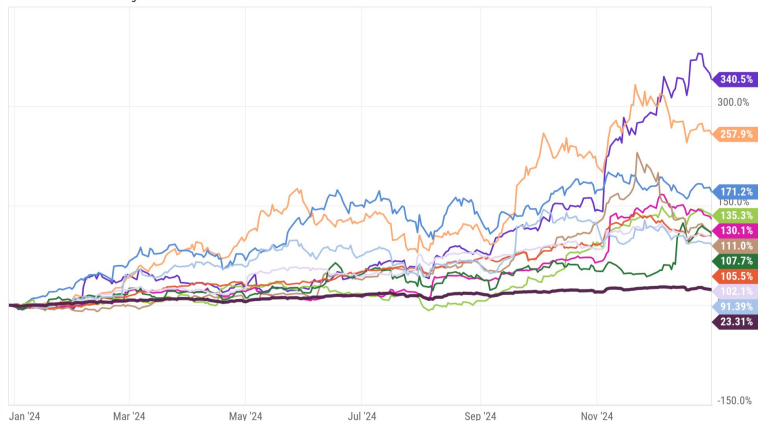
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Best-Performing Stocks of 2024

Best-Performing S&P 500 Stocks in 2024

- Palantir Technologies Inc Price % Change
- Vistra Corp Price % Change
- NVIDIA Corp Price % Change
- United Airlines Holdings Inc Price % Change
- Axon Enterprise Inc Price % Change
- Texas Pacific Land Corp Price % Change
- Broadcom Inc Price % Change
- Targa Resources Corp Price % Change
- Howmet Aerospace Inc Price % Change
- Constellation Energy Corp Price % Change
- S&P 500 Level % Change



Date Range: 12/29/2023 - 12/31/2024

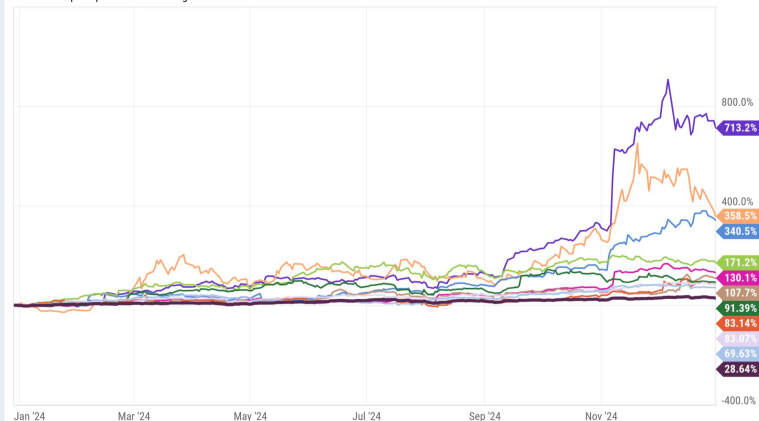
Past performance is no guarantee of future results. You cannot invest directly in an index

Jan 7, 2025, 6:35 PM EST Powered by YCHARTS

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Best-Performing Nasdaq Stocks in 2024

- AppLovin Corp Price % Change
- MicroStrategy Inc Price % Change
- Palantir Technologies Inc Price % Change
- NVIDIA Corp Price % Change
- Axon Enterprise Inc Price % Change
- Broadcom Inc Price % Change
- Constellation Energy Corp Price % Change
- Marvell Technology Inc Price % Change
- Netflix Inc Price % Change
- DoorDash Inc Price % Change
- Nasdaq Composite Level % Change



Date Range: 12/29/2023 - 12/31/2024

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

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Index Concentration

SPY Top 10 Holdings

SPY Holdings		
Symbol	Name	% Weight
AAPL	Apple Inc	7.60%
NVDA	NVIDIA Corp	6.61%
MSFT	Microsoft Corp	6.29%
AMZN	Amazon.com Inc	4.12%
META	Meta Platforms Inc	2.56%
TSLA	Tesla Inc	2.26%
GOOGL	Alphabet Inc	2.22%
AVGO	Broadcom Inc	2.17%
GOOG	Alphabet Inc	1.82%
BRK.B	Berkshire Hathaway Inc	1.67%

Top 10 = 37.32% of SPY

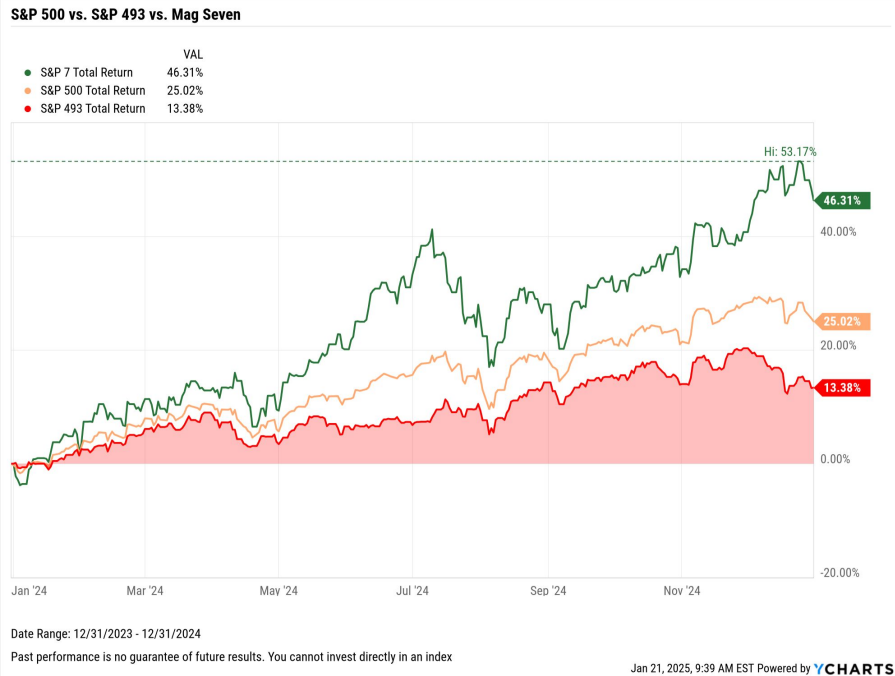
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QQQ Top 10 Holdings

QQQ Holdings		
Symbol	Name	% Weight
AAPL	Apple Inc	8.77%
NVDA	NVIDIA Corp	8.24%
MSFT	Microsoft Corp	7.65%
AMZN	Amazon.com Inc	5.30%
META	Meta Platforms Inc	4.85%
AVGO	Broadcom Inc	4.71%
TSLA	Tesla Inc	4.06%
COST	Costco Wholesale Corp	2.70%
GOOGL	Alphabet Inc	2.41%
NFLX	Netflix Inc	2.39%

Top 10 = 51.08% of QQQ

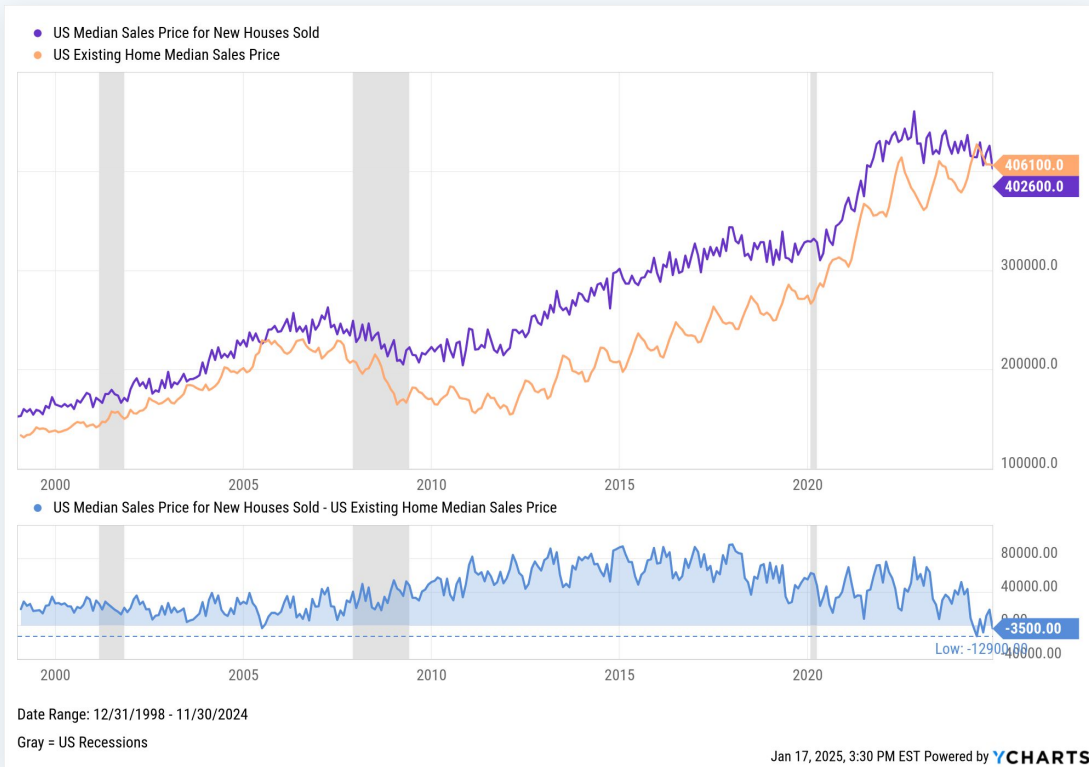
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