

Monthly Benchmark Returns



Calendar Year Returns										
2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	YTD 2024
REAL ESTATE 27.24%	REAL ESTATE 2.14%	NATURAL RESOURCES 30.87%	EMERGING MARKET 37.28%	US GOV'T BONDS 1.47%	LARGE CAP STOCKS 31.49%	LARGE CAP STOCKS 18.40%	NATURAL RESOURCES 39.95%	NATURAL RESOURCES 34.07%	LARGE CAP STOCKS 26.29%	LARGE CAP STOCKS 15.29%
LARGE CAP STOCKS 13.69%	US GOV'T BONDS 1.76%	SMALL CAP STOCKS 26.56%	FOREIGN STOCKS 25.03%	US CORP BONDS -3.67%	REAL ESTATE 28.92%	EMERGING MARKET 18.31%	REAL ESTATE 38.99%	US GOV'T BONDS -9.38%	FOREIGN STOCKS 18.24%	NATURAL RESOURCES 9.60%
MID-CAP STOCKS 9.77%	LARGE CAP STOCKS 1.38%	MID-CAP STOCKS 20.74%	LARGE CAP STOCKS 21.83%	REAL ESTATE -4.03%	MID-CAP STOCKS 26.20%	MID-CAP STOCKS 13.66%	LARGE CAP STOCKS 28.71%	MID-CAP STOCKS -13.06%	MID-CAP STOCKS 16.44%	EMERGING MARKET 7.49%
US CORP BONDS 8.66%	US CORP BONDS -0.74%	LARGE CAP STOCKS 11.96%	MID-CAP STOCKS 16.24%	LARGE CAP STOCKS -4.38%	SMALL CAP STOCKS 22.78%	US CORP BONDS 11.30%	SMALL CAP STOCKS 26.82%	FOREIGN STOCKS -14.45%	SMALL CAP STOCKS 16.05%	MID-CAP STOCKS 6.17%
SMALL CAP STOCKS 5.76%	FOREIGN STOCKS -0.81%	EMERGING MARKET 11.19%	SMALL CAP STOCKS 13.23%	SMALL CAP STOCKS -8.48%	FOREIGN STOCKS 22.01%	SMALL CAP STOCKS 11.29%	MID-CAP STOCKS 24.76%	SMALL CAP STOCKS -16.10%	REAL ESTATE 12.25%	FOREIGN STOCKS 5.34%
US GOV'T BONDS 3.22%	SMALL CAP STOCKS -2.00%	REAL ESTATE 7.56%	REAL ESTATE 9.84%	MID-CAP STOCKS -11.08%	EMERGING MARKET 18.42%	FOREIGN STOCKS 7.82%	FOREIGN STOCKS 11.26%	US CORP BONDS -17.92%	EMERGING MARKET 9.83%	US GOV'T BONDS -0.07%
EMERGING MARKET -2.19%	MID-CAP STOCKS -2.18%	US CORP BONDS 6.37%	US CORP BONDS 7.29%	FOREIGN STOCKS -13.79%	NATURAL RESOURCES 17.63%	US GOV'T BONDS 7.07%	US CORP BONDS -1.49%	LARGE CAP STOCKS -18.11%	US CORP BONDS 9.45%	SMALL CAP STOCKS -0.72%
FOREIGN STOCKS -4.90%	EMERGING MARKET -14.92%	US GOV'T BONDS 1.35%	US GOV'T BONDS 1.30%	EMERGING MARKET -14.58%	US CORP BONDS 17.27%	REAL ESTATE -5.29%	US GOV'T BONDS -2.33%	EMERGING MARKET -20.09%	US GOV'T BONDS 4.34%	US CORP BONDS -1.20%
NATURAL RESOURCES -9.77%	NATURAL RESOURCES -24.28%	FOREIGN STOCKS 1.00%	NATURAL RESOURCES 1.23%	NATURAL RESOURCES -21.07%	US GOV'T BONDS 5.88%	NATURAL RESOURCES -19.01%	EMERGING MARKET -2.54%	REAL ESTATE -25.17%	NATURAL RESOURCES 3.66%	REAL ESTATE -2.88%

Trailing Annualized (06/30/2024)		
3 Year	5 Year	10 Year
NATURAL RESOURCES 17.14%	LARGE CAP STOCKS 15.05%	LARGE CAP STOCKS 12.87%
LARGE CAP STOCKS 10.03%	NATURAL RESOURCES 12.13%	MID-CAP STOCKS 9.14%
MID-CAP STOCKS 4.48%	MID-CAP STOCKS 10.27%	SMALL CAP STOCKS 8.24%
FOREIGN STOCKS 2.90%	SMALL CAP STOCKS 8.06%	REAL ESTATE 5.77%
SMALL CAP STOCKS -0.26%	FOREIGN STOCKS 6.46%	FOREIGN STOCKS 4.34%
REAL ESTATE -1.95%	EMERGING MARKET 3.10%	EMERGING MARKET 2.79%
US GOV'T BONDS -2.18%	REAL ESTATE 3.04%	US CORP BONDS 2.43%
US CORP BONDS -3.87%	US CORP BONDS 0.39%	NATURAL RESOURCES 2.23%
EMERGING MARKET -5.07%	US GOV'T BONDS -0.01%	US GOV'T BONDS 1.16%

Large Cap Stocks – Standard & Poor's 500®
Mid Cap Stocks – Standard & Poor's MidCap 400
Small Cap Stocks – Standard & Poor's SmallCap 600
Foreign Stocks – MSCI EAFE Index
Emerging Market Stocks – MSCI Emerging Markets

US Corp Bonds – iBoxx \$ Liquid Investment Grade Index
US Gov't Bonds – ICE U.S. 3-7 Year Treasury Bond Index
US Real Estate – Dow Jones U.S. Real Estate Index
Natural Resources – S&P North American Natural Resources Sector Index

Source: Bloomberg. This material has been obtained from sources generally considered reliable. No guarantee can be made as to its accuracy. Not intended to represent the performance of any particular investment. Indices are unmanaged and one cannot invest directly in an index. Past performance is not a guarantee of future results. Returns in excess of 1 year are annualized.

Data as-of 06/30/2024

