



Top News

WSJ U.S. Business News*

Tesla, Ford and GM Raise EV Prices as Costs, Demand Grow

Air Travel Is Expensive, Messy---and Booming

After Roe v. Wade Ruling, Employers Weigh In on Abortion and Benefits---Cautiously

Pension Funds Plunge Into Riskier Bets---Just as Markets Are Struggling

Amazon's Prime Day Isn't Quite the Blockbuster It Once Was

Central Banks Should Raise Rates Sharply or Risk High-Inflation Era, BIS Warns

U.S. and G-7 Allies Detail Infrastructure Plan to Challenge China

Global Tax Deal Faces Roadblocks From Hungary, Congress

Economy Week Ahead: Factories, Inflation and Consumer Spending in Focus

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Institutional Industry News

PlanAdvisor

Retirement Industry People Moves

MITRE Corp. Faces Familiar ERISA Fiduciary Breach Allegations

Investment Product and Service Launches

The Role of the 401(k) in Today's Tight Labor Market

Advisers Giving Back: Independent Financial Group

NAPA-Net

TGIF. No, Really.

READER RADAR: What Are the Top 10 Business Development Topics for the 2023 NAPA 401(k) Summit?

Federal Judge Tosses Excessive Fee Suit

WIPN: Women Still Facing Headwinds in the Retirement Industry

SEC Finalizes New E-Filing Requirements

Wealth Industry News

CityWire USA

'A really, really big push': Creative Planning adds 123 employees

SEC will bring more 'L bonds' cases, attorney predicts

RIA ranks rise by 7%, number of clients up to 65m: IAA report

What advisors can learn from the first Reg BI action

BlackRock trims ESG fund exposure in model portfolios

Michael Kitces: Nerd's Eye View

Weekend Reading For Financial Planners (June 25-26)

When Roth Conversions Go 'On Sale': Discounted Roth Conversions During A Bear Market Decline

Financial Planning Magazine

Citi must pay \$1.4M to financial advisor who called it a 'boys club'

5 ways 'SECURE 2.0' legislation could change retirement savings

Inside Atlantic Union's decision to sell its profitable RIA unit

Meme stocks exposed bad business practices, poor risk management, House committee says: Wealthtech Weekly

Prenups are rare. Here's why that's bad for wealth management

Raymond James' Black advisors network confronts the industry's representation problem

Wealth tech's shortcomings — and its potential for industry disruption

BofA offers Versailles, Petra travel perks to lure ultra wealthy

CAPTRUST Blogs

Manager Intelligence Blog

American Century Emerging Markets: Meeting recap with Client Portfolio Manager Nathan Chaudoin (May 2022)

Retirement Plan Blog

Update on DOL Agenda - ESG, 5500, Fiduciary Rule, Lifetime Income Disclosure

Private Wealth Blog

NEW Schwab Margin Rate

Endowment Foundation Blog		Investment Committee Blog
Asset Allocation Return Calculation Methodology		Investment Committee - House Views
2021 NACUBO-TIAA Study of Endowments		Trade Note: Capital Preservation Models - Repositioning

U.S. Equities

	1 Day	3 Mo	6 Mo	YTD	1 Yr	3 Yr	5 Yr	10 Yr
S&P 500 Index	3.06	-13.11	-16.59	-17.31	-6.98	11.77	11.90	13.56
Dow Jones Industrial Average	2.68	-8.76	-11.49	-12.43	-6.09	7.90	10.45	12.18
NASDAQ Composite Index	3.34	-18.04	-25.56	-25.52	-18.66	14.11	14.17	16.16
Russell Mid Cap Index	3.29	-13.67	-17.84	-18.85	-14.18	8.07	8.67	11.94
Russell 2000 Index	3.16	-14.63	-20.72	-20.88	-23.45	6.20	5.88	10.04
CBOE Market Volatility (VIX)	-6.27	25.66	51.61	58.13	70.51	21.29	22.13	4.16

1 Day			
	Value	Blend	Growth
Large	2.67	3.06	3.63
Mid	3.11	3.29	3.67
Small	2.94	3.16	3.42

QTD			
	Value	Blend	Growth
Large	-10.05	-13.33	-17.31
Mid	-12.31	-13.96	-17.29
Small	-12.76	-14.45	-16.30

YTD			
	Value	Blend	Growth
Large	-10.71	-17.31	-24.78
Mid	-13.91	-18.85	-27.70
Small	-14.85	-20.88	-26.87

1 Year			
	Value	Blend	Growth
Large	-4.31	-6.98	-14.13
Mid	-7.53	-14.18	-25.61
Small	-15.50	-23.45	-30.93

3 Year			
	Value	Blend	Growth
Large	7.93	11.77	14.11
Mid	7.98	8.07	6.09
Small	8.13	6.20	3.43

5 Year			
	Value	Blend	Growth
Large	7.77	11.90	14.98
Mid	6.96	8.67	9.67
Small	5.71	5.88	5.40

GICS Sectors	1 Day	3 Mo	6 Mo	YTD	1 Yr	3 Yr	5 Yr	10 Yr
Communication Services	3.93	-17.29	-27.62	-27.02	-27.16	6.62	8.31	7.68
Consumer Discretionary	3.78	-21.24	-28.86	-29.12	-20.72	11.16	13.18	15.49
Consumer Staples	1.84	-2.06	-2.22	-4.62	8.51	10.62	8.65	10.98
Energy	1.54	-6.36	32.50	31.23	35.77	9.74	6.80	4.45
Financials	3.82	-16.48	-16.84	-17.19	-10.19	8.11	8.29	12.77
Health Care	1.69	-4.45	-7.32	-8.17	3.22	13.76	11.95	15.33
Industrials	3.44	-13.93	-15.06	-16.46	-12.95	6.38	7.10	11.68
Information Technology	3.66	-17.07	-24.31	-24.53	-10.98	19.38	20.02	19.01
Materials	4.06	-13.43	-12.59	-14.87	-5.08	11.91	9.12	10.62
Real Estate	2.04	-9.06	-15.04	-18.07	-4.09	6.37	8.40	9.09
Utilities	1.79	-3.05	0.00	-2.56	11.96	7.19	8.53	10.14

International Equities

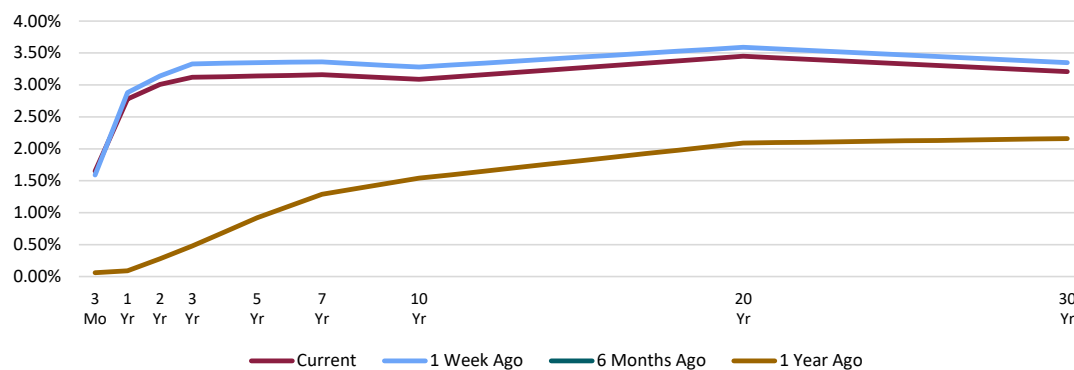
International Equities	1 Day	3 Mo	6 Mo	YTD	1 Yr	3 Yr	5 Yr	10 Yr
MSCI ACWI Ex USA	1.90	-11.92	-16.64	-17.43	-18.86	1.85	2.73	5.26
MSCI EAFE	2.00	-12.26	-17.66	-18.39	-17.46	1.65	2.45	5.88
MSCI Emerging Markets	1.60	-10.29	-16.09	-16.95	-24.21	0.94	2.37	3.38
MSCI Frontier Markets	0.89	-16.62	-17.43	-17.32	-14.17	-5.83	-1.74	1.27
China	0.89	3.06	-7.42	-7.97	-6.08	3.65	1.19	4.01
Japan	1.23	-4.91	-6.95	-7.10	-6.47	9.64	7.72	13.77
Germany	1.59	-8.10	-16.74	-17.42	-15.85	2.24	0.60	7.67
Great Britain	2.68	-2.57	-0.26	-0.44	5.24	2.72	3.31	6.69
India	0.88	-7.88	-6.97	-8.77	1.28	11.77	12.45	13.51
France	3.23	-5.12	-12.03	-12.84	-5.62	5.90	5.86	10.41
Italy	2.33	-6.79	-15.46	-16.49	-8.53	4.62	4.76	8.49
Canada	1.86	-12.46	-8.93	-9.02	-3.09	8.06	7.66	8.45
South Korea	2.26	-13.30	-21.44	-20.52	-27.98	3.63	-0.10	2.51
Brazil	0.60	-17.12	-5.93	-5.87	-23.81	-1.12	10.06	5.93
Spain	1.70	0.57	-2.01	-3.75	-6.23	-0.46	-1.57	6.03
Mexico	2.32	-14.49	-9.67	-10.38	-5.57	2.96	-0.51	2.02
Hong Kong	2.09	-1.03	-6.48	-7.17	-24.80	-8.67	-3.29	1.35

Returns by country are represented by the following indexes: China (Shanghai Composite), Japan (Nikkei 225), Germany (DAX), Great Britain (FTSE 100), India (S&P BSE SENSEX), France (CAC 40), Italy (FTSE MIB), Canada (S&P/TSX Composite), South Korea (KOSPI), Russia (MOEX), Brazil (IBOVESPA), Spain (IBEX 35), Mexico (S&P/BMV IPC), and Hong Kong (Hang Seng).

Fixed Income

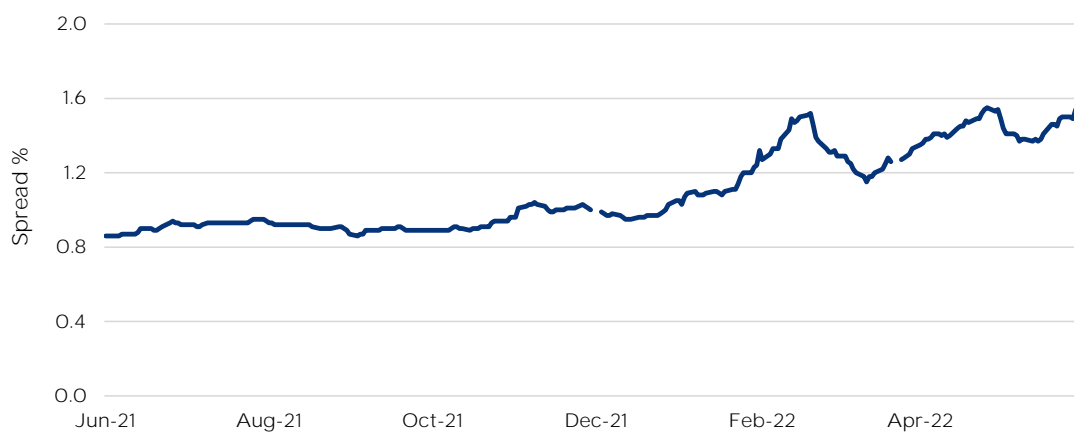
Fixed Income	1 Day	3 Mo	6 Mo	YTD	1 Yr	3 Yr	5 Yr	10 Yr
US Aggregate Bond Index	-0.23	-5.07	-10.80	-10.94	-10.68	-1.10	0.63	1.49
3 Month T-Bill	0.00	0.11	0.14	0.14	0.17	0.64	1.11	0.64
Global Aggregate Bond Index	-0.10	-7.81	-13.88	-13.94	-15.33	-3.20	-0.62	0.17
High Yield	0.58	-7.48	-12.41	-12.61	-10.89	0.79	2.54	4.73
TIPS	0.01	-5.87	-6.98	-7.79	-3.48	3.45	3.31	1.87
Municipals	0.01	-3.64	-9.27	-9.31	-8.78	-0.28	1.33	2.35
Intermediate Government	-0.12	-2.32	-6.22	-6.24	-6.69	-0.45	0.70	0.93
Intermediate Corporate	-0.06	-3.89	-9.03	-9.17	-9.42	-0.16	1.38	2.39
Intermediate Credit	-0.07	-3.68	-8.61	-8.74	-9.01	-0.19	1.31	2.20
Long Government	-1.28	-12.54	-22.35	-22.64	-19.44	-3.39	-0.29	1.45
Long Corporate	-0.46	-11.50	-22.52	-22.97	-21.36	-2.28	0.76	3.27
Long Credit	-0.47	-11.33	-22.20	-22.63	-21.03	-2.38	0.76	3.16
Emerging Market Debt	-0.03	-9.09	-18.85	-19.08	-19.98	-4.72	-0.96	2.42

Yield Curve



	3 Mo	1 Yr	2 Yr	3 Yr	5 Yr	7 Yr	10 Yr	20 Yr	30 Yr
Current	1.65%	2.78%	3.01%	3.12%	3.14%	3.16%	3.09%	3.45%	3.21%
1 Week Ago	1.59%	2.88%	3.14%	3.33%	3.35%	3.36%	3.28%	3.59%	3.35%
6 Months Ago	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A	#N/A
1 Year Ago	0.06%	0.09%	0.28%	0.48%	0.92%	1.29%	1.54%	2.09%	2.16%

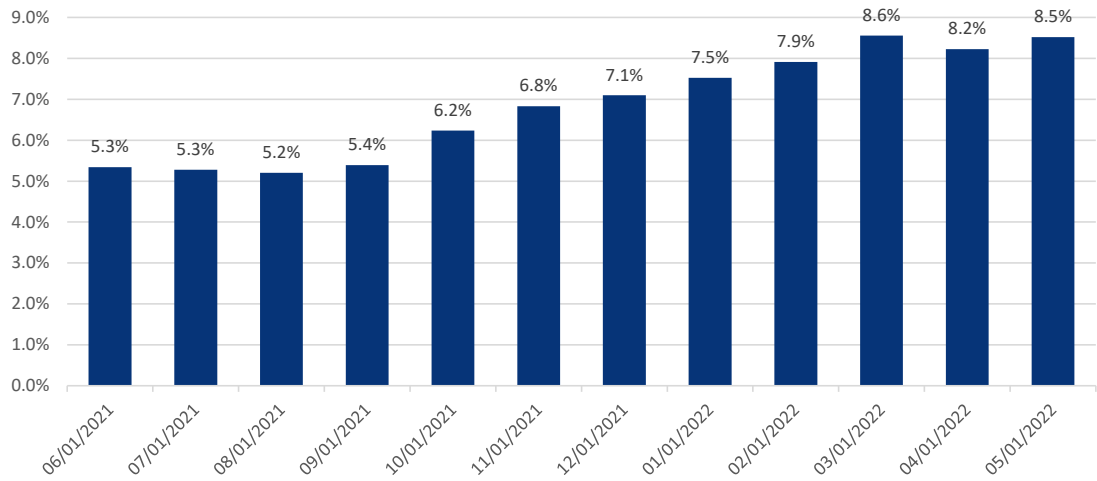
U.S. Corporate Spreads



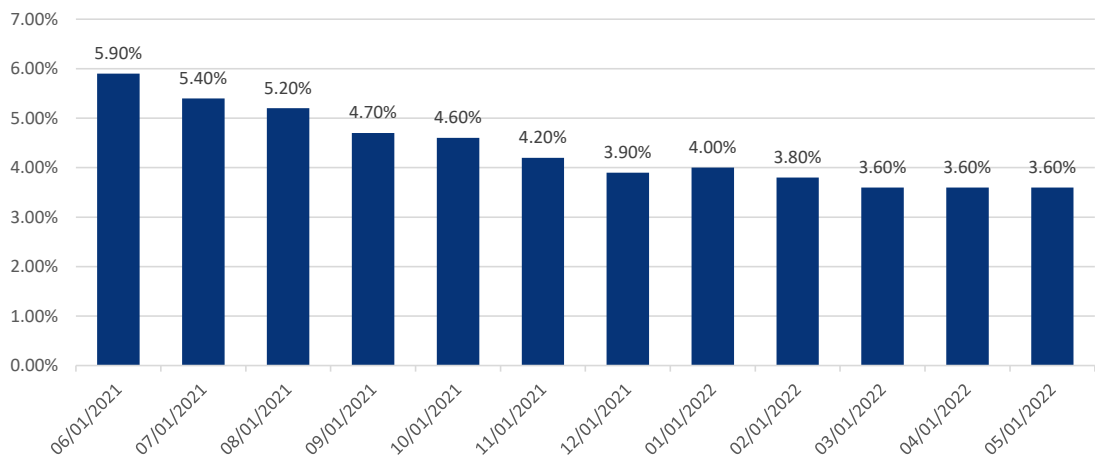
U.S. High Yield Spreads



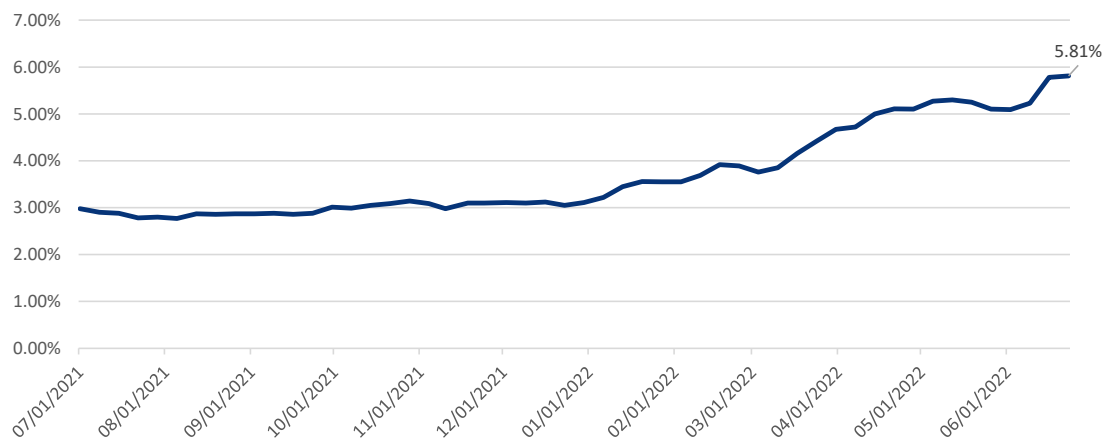
Year-Over-Year Inflation: CPI All Items



Unemployment Rate



Rate Average: 30 Year Fixed Mortgage



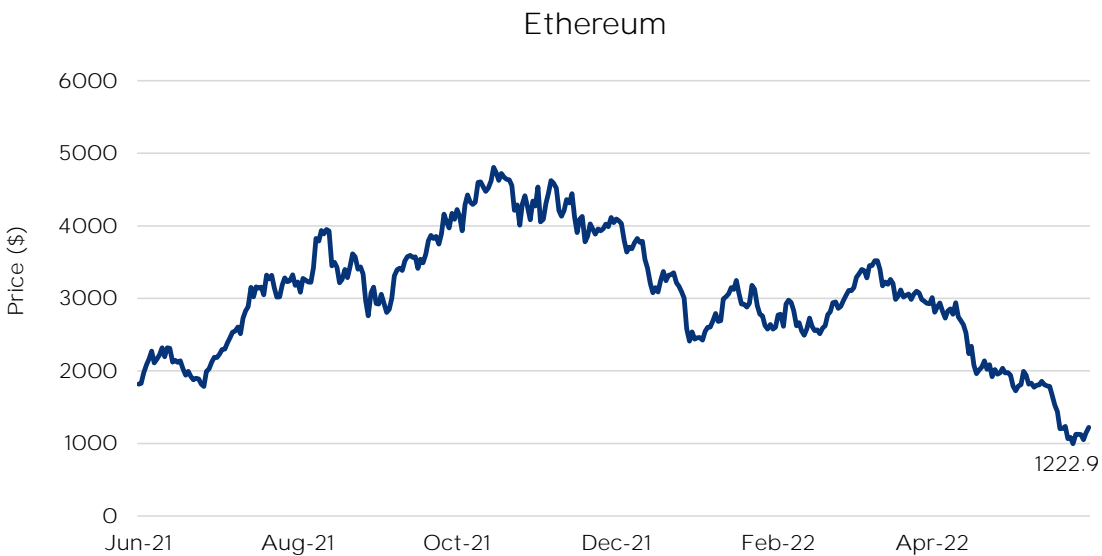
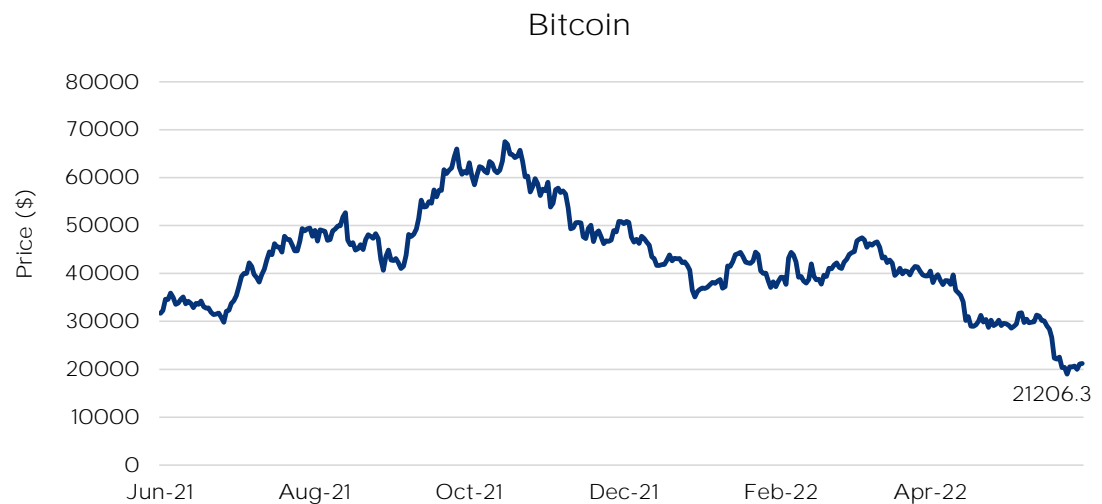
Exchange Rates

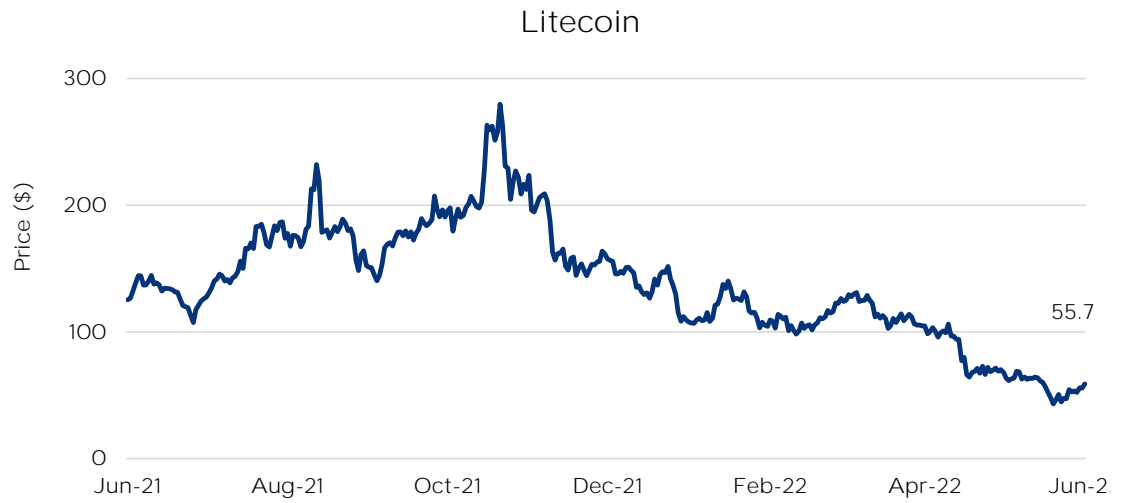
Data as of: 6.17.2022

	Current	6 Mths Ago	1 Year Ago
US Dollar / Euro	1.05	1.13	1.19
Yen / US Dollar	135.14	113.45	110.78
US Dollar / British Pound	1.22	1.32	1.39
Yuan / US Dollar	6.72	6.38	6.45
Canadian Dollar / US Doll	1.31	1.29	1.23
Mexican Peso / US Dollar	20.43	20.74	19.79
Brazilian Real / US Dollar	5.14	5.72	4.92
Indian Rupee / US Dollar	78.00	75.82	74.14

Cryptocurrency

Data as of: 6.25.2022





Oil Price

Data as of: 6.13.2022

