



Top News

WSJ U.S. Business News*

Musk Has Twitter's Data, but Getting Answers on Spam Accounts May Be Tougher

JetBlue Again Raises Offer to Buy Spirit Airlines

Steelmakers Avoid Russian Components but Bargain Hunters Swoop In

CVS, Walmart Impose Purchase Limits on Plan B Pills

Volkswagen Nears Deal to Sell Stake in Electrify America to Siemens

Zelensky Asks for Western Help to Push Russia Out of Ukraine Before Winter

Orders for Big-Ticket U.S. Goods Rose in May

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

Global Tax Deal Faces Roadblocks From Hungary, Congress

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Institutional Industry News

PlanAdvisor

2022's Asset and Wealth Management Landscape So Far

Financial Wellness Insights From 2 Advisers

Strategies for Reining In Health Care Costs in Early Retirement

Retirement Industry People Moves

MITRE Corp. Faces Familiar ERISA Fiduciary Breach Allegations

NAPA-Net

What's Your Pick(s) for the 2023 NAPA 401(k) Summit—Part 4

Capozzi Adler Takes Another Shot at MITRE

Workers Resetting Retirement Goals Amid Economic Unrest

Financial Privacy Bill Could Affect Providers

TGIF. No, Really.

Wealth Industry News

CityWire USA

Ex-advisor sentenced to six years in prison over fraud

Edelman non-compete fight raises questions about RIA-to-RIA breakaways

'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

Michael Kitces: Nerd's Eye View

#FA Success Ep 287: Finding Solo Efficiency To Serve 50 Great Clients With \$100M AUM, With Jennifer Murray

How To Take More Vacation: An Advisor's Guide To Balancing Work And Time Off

Financial Planning Magazine

Talking about inflation raises prices. Here's how financial advisors can address the "I" word

Why alts should stop getting the fringe treatment

Mythbusting Social Security's fiscal woes — with numbers and facts

Diversity grant winners finish CFP test prep at twice the rate of others

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

Banks weigh in on the overturning of Roe v. Wade

5 ways 'SECURE 2.0' legislation could change retirement savings

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

CAPTRUST Blogs

Manager Intelligence Blog

Columbia Dividend Income: Strategy Update (manager retirement)

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: Equity and Fixed Income Repositioning	

U.S. Equities

	1 Day	3 Mo	6 Mo	YTD	1 Yr	3 Yr	5 Yr	10 Yr
S&P 500 Index	-0.29	-13.81	-17.97	-17.56	-7.56	11.91	12.01	13.55
Dow Jones Industrial Average	-0.20	-9.34	-12.52	-12.60	-6.92	8.10	10.49	12.16
NASDAQ Composite Index	-0.72	-18.49	-27.11	-26.06	-19.19	14.02	14.45	16.15
Russell Mid Cap Index	-0.05	-14.08	-18.86	-18.89	-14.85	8.15	8.77	11.97
Russell 2000 Index	0.34	-14.44	-21.15	-20.61	-23.21	5.93	6.12	10.06
CBOE Market Volatility (VIX)	-1.03	29.51	52.43	56.50	72.54	19.43	19.50	3.32

	1 Day		
	Value	Blend	Growth
Large	0.00	-0.29	-0.62
Mid	0.08	-0.05	-0.29
Small	0.35	0.34	0.33

	QTD		
	Value	Blend	Growth
Large	-10.04	-13.58	-17.82
Mid	-12.24	-14.01	-17.53
Small	-12.45	-14.15	-16.02

	YTD		
	Value	Blend	Growth
Large	-10.71	-17.56	-25.25
Mid	-13.84	-18.89	-27.91
Small	-14.55	-20.61	-26.62

	1 Year		
	Value	Blend	Growth
Large	-4.93	-7.56	-14.75
Mid	-8.22	-14.85	-26.22
Small	-15.01	-23.21	-30.93

	3 Year		
	Value	Blend	Growth
Large	8.04	11.91	14.19
Mid	8.12	8.15	6.06
Small	7.86	5.93	3.15

	5 Year		
	Value	Blend	Growth
Large	7.80	12.01	15.16
Mid	6.98	8.77	9.87
Small	5.80	6.12	5.79

GICS Sectors	1 Day	3 Mo	6 Mo	YTD	1 Yr	3 Yr	5 Yr	10 Yr
Communication Services	-1.02	-18.36	-28.98	-27.77	-27.99	6.86	8.28	7.59
Consumer Discretionary	-1.15	-21.95	-30.27	-29.94	-21.84	10.77	13.04	15.43
Consumer Staples	-0.20	-3.04	-3.41	-4.81	7.43	11.04	8.71	10.92
Energy	2.89	-5.87	33.50	35.02	39.11	10.81	7.49	4.63
Financials	-0.46	-17.81	-18.03	-17.57	-11.68	7.83	7.96	12.74
Health Care	0.37	-4.52	-7.81	-7.83	3.15	14.27	12.30	15.36
Industrials	-0.21	-14.55	-16.09	-16.64	-13.36	6.41	7.23	11.72
Information Technology	-0.71	-17.48	-26.37	-25.07	-11.49	19.27	20.39	19.07
Materials	-0.76	-15.01	-14.54	-15.51	-5.85	11.53	9.02	10.55
Real Estate	-0.24	-10.32	-16.84	-18.26	-4.97	7.15	8.31	9.00
Utilities	0.79	-3.72	0.30	-1.80	11.57	8.45	8.80	10.11

International Equities

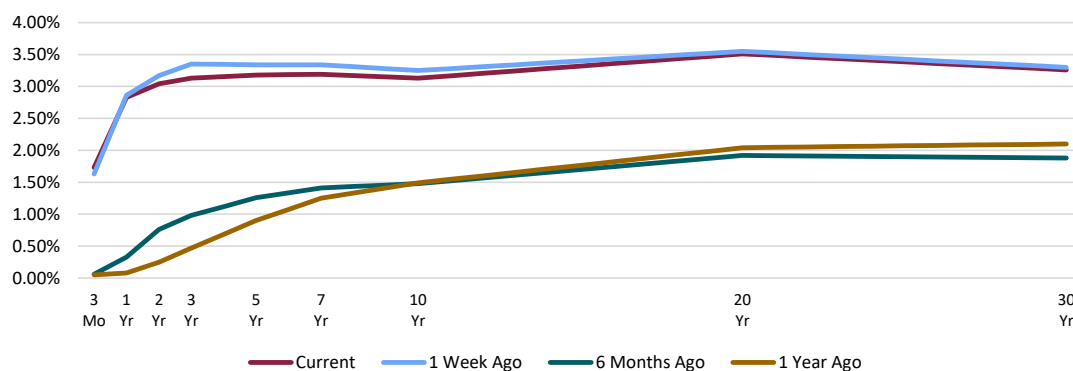
International Equities	1 Day	3 Mo	6 Mo	YTD	1 Yr	3 Yr	5 Yr	10 Yr
MSCI ACWI Ex USA	1.33	-10.45	-15.64	-16.33	-18.29	2.33	2.94	5.44
MSCI EAFE	1.17	-11.13	-16.82	-17.43	-16.90	2.11	2.64	6.05
MSCI Emerging Markets	1.65	-7.86	-14.80	-15.59	-23.65	1.39	2.57	3.59
MSCI Frontier Markets	0.76	-16.45	-17.26	-16.69	-14.04	-5.53	-1.61	1.26
China	0.88	5.20	-6.55	-7.16	-6.33	4.08	1.15	4.31
Japan	1.44	-3.67	-5.26	-5.76	-5.76	10.02	7.93	14.00
Germany	0.52	-7.83	-16.73	-16.99	-15.52	2.43	0.80	7.79
Great Britain	0.69	-2.11	0.42	0.25	5.58	2.99	3.42	6.74
India	0.82	-6.75	-6.68	-8.02	1.68	11.64	12.77	13.61
France	-0.43	-5.50	-13.06	-13.22	-5.91	5.91	5.80	10.46
Italy	-0.86	-8.18	-16.85	-17.21	-9.63	4.61	4.62	8.68
Canada	1.05	-11.84	-7.97	-8.06	-2.17	8.87	7.94	8.57
South Korea	1.49	-12.02	-19.92	-19.34	-27.28	4.02	0.08	2.83
Brazil	2.12	-15.38	-4.54	-3.87	-20.82	0.01	10.32	6.61
Spain	0.00	0.26	-2.68	-3.75	-6.44	-0.34	-1.62	6.35
Mexico	1.16	-12.88	-9.32	-9.34	-4.46	3.69	-0.33	2.03
Hong Kong	2.35	3.85	-4.28	-4.99	-24.10	-8.08	-2.97	1.49

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

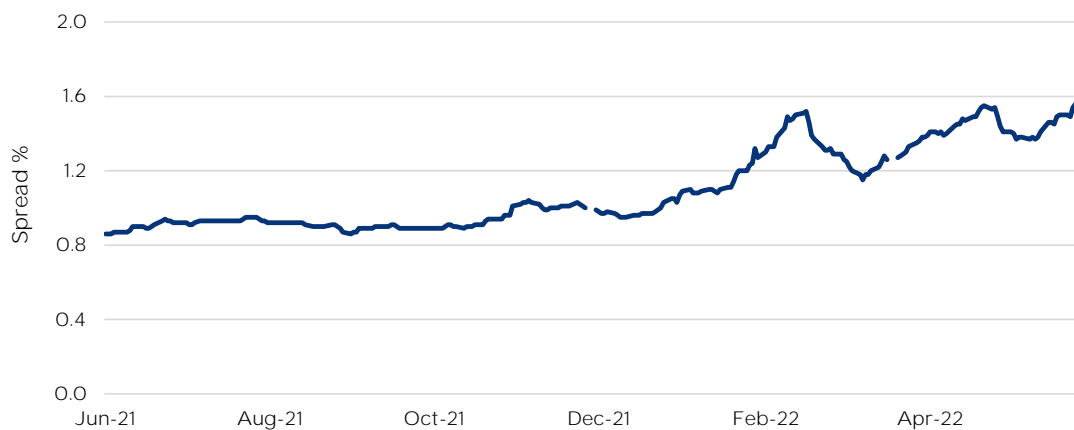
Fixed Income	1 Day	3 Mo	6 Mo	YTD	1 Yr	3 Yr	5 Yr	10 Yr
US Aggregate Bond Index	-0.35	-4.69	-11.21	-11.25	-10.83	-1.25	0.59	1.43
3 Month T-Bill	0.00	0.11	0.14	0.14	0.16	0.63	1.11	0.64
Global Aggregate Bond Index	-0.24	-7.62	-14.08	-14.14	-15.48	-3.25	-0.64	0.15
High Yield	0.02	-7.33	-12.61	-12.59	-10.95	0.87	2.50	4.72
TIPS	-0.54	-5.73	-7.92	-8.29	-4.04	3.27	3.25	1.77
Municipals	0.02	-3.31	-9.29	-9.29	-8.76	-0.28	1.35	2.35
Intermediate Government	-0.24	-1.99	-6.44	-6.47	-6.85	-0.53	0.68	0.89
Intermediate Corporate	-0.27	-3.65	-9.37	-9.42	-9.61	-0.26	1.35	2.35
Intermediate Credit	-0.26	-3.43	-8.93	-8.98	-9.19	-0.28	1.29	2.16
Long Government	-0.76	-11.99	-23.22	-23.22	-19.32	-3.78	-0.33	1.28
Long Corporate	-0.72	-11.37	-23.44	-23.52	-21.52	-2.60	0.67	3.12
Long Credit	-0.69	-11.17	-23.09	-23.17	-21.19	-2.69	0.67	3.02
Emerging Market Debt	-0.25	-9.27	-19.06	-19.28	-20.14	-4.77	-1.03	2.38

Yield Curve



	3 Mo	1 Yr	2 Yr	3 Yr	5 Yr	7 Yr	10 Yr	20 Yr	30 Yr
Current	1.73%	2.83%	3.04%	3.13%	3.18%	3.19%	3.13%	3.51%	3.26%
1 Week Ago	1.63%	2.86%	3.17%	3.35%	3.34%	3.34%	3.25%	3.55%	3.30%
6 Months Ago	0.06%	0.33%	0.76%	0.98%	1.26%	1.41%	1.48%	1.92%	1.88%
1 Year Ago	0.05%	0.08%	0.25%	0.47%	0.90%	1.25%	1.49%	2.04%	2.10%

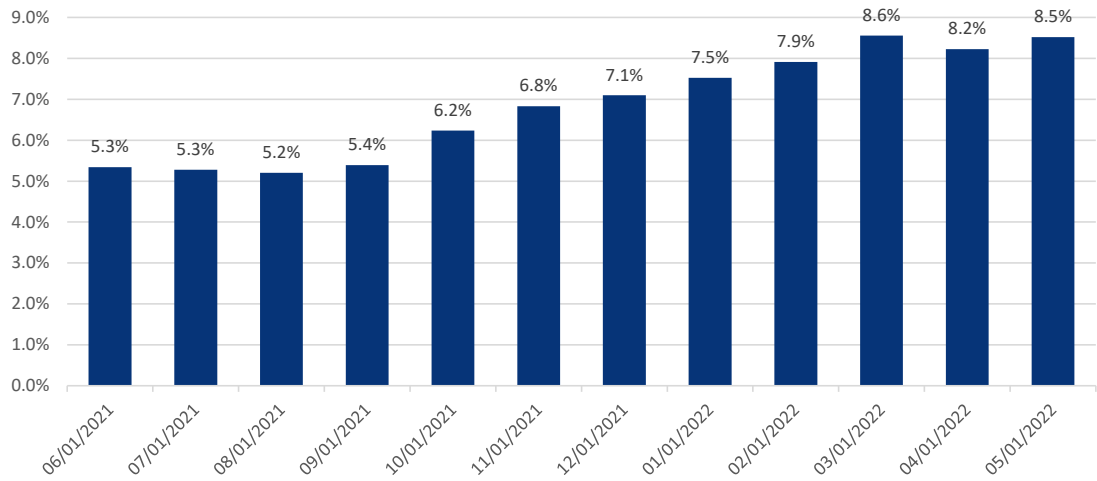
U.S. Corporate Spreads



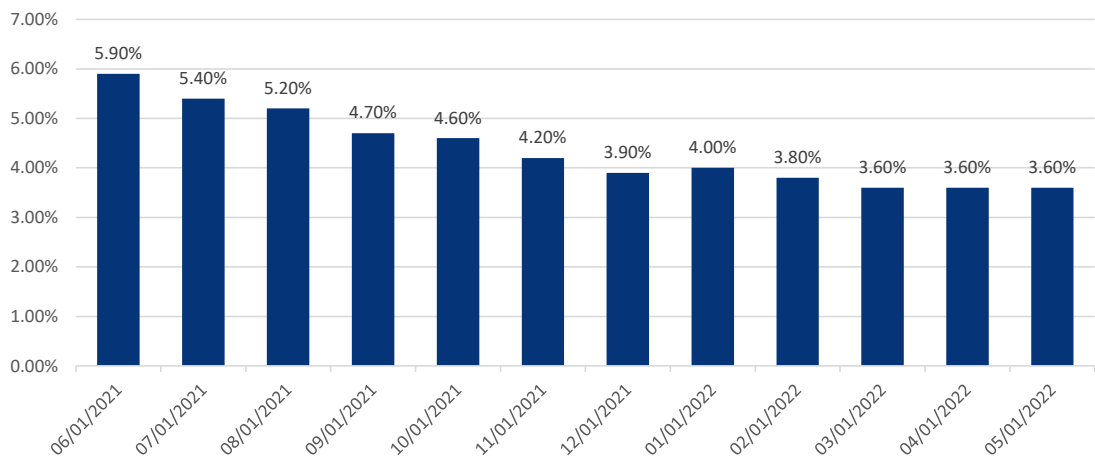
U.S. High Yield Spreads



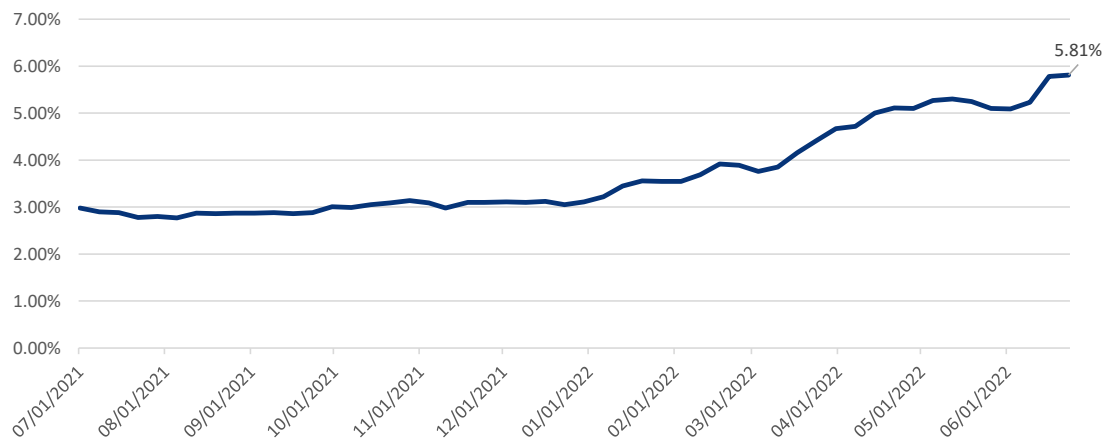
Year-Over-Year Inflation: CPI All Items



Unemployment Rate



Rate Average: 30 Year Fixed Mortgage



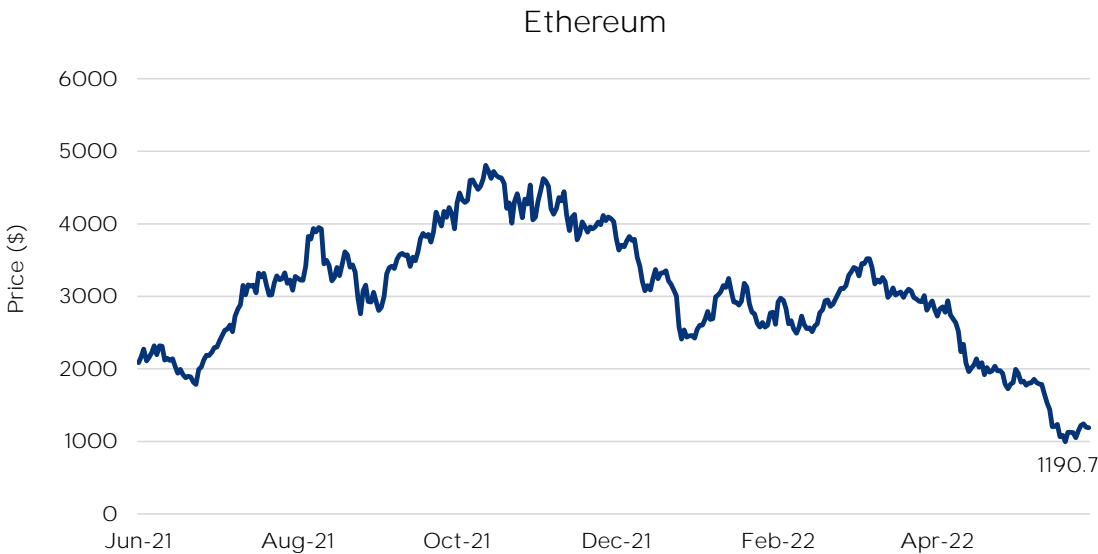
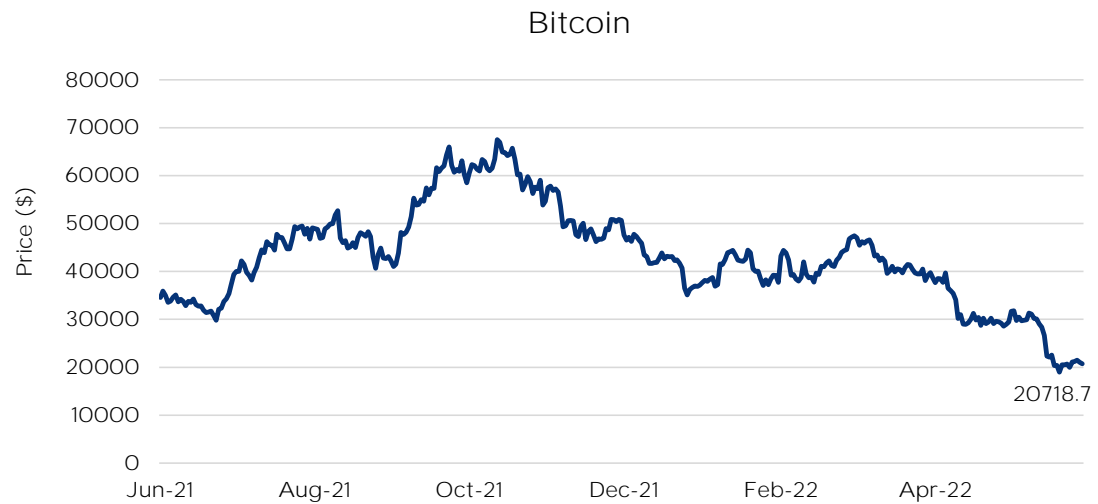
Exchange Rates

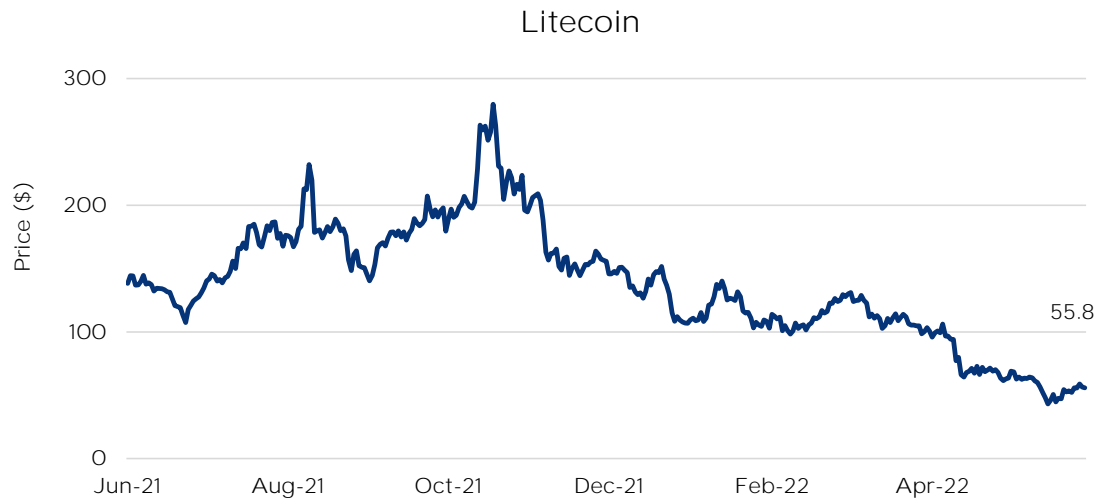
Data as of: 6.24.2022

	Current	6 Mths Ago	1 Year Ago
US Dollar / Euro	1.05	1.13	1.19
Yen / US Dollar	135.22	114.11	110.50
US Dollar / British Pound	1.23	1.33	1.39
Yuan / US Dollar	6.69	6.37	6.46
Canadian Dollar / US Doll	1.29	1.29	1.23
Mexican Peso / US Dollar	19.91	20.81	19.78
Brazilian Real / US Dollar	5.24	5.75	4.95
Indian Rupee / US Dollar	78.25	75.67	74.29

Cryptocurrency

Data as of: 6.27.2022





Oil Price

Data as of: 6.13.2022

