# Investment perspectives



#### **2021 Spring Edition**

### **Market Performance**

	Tota			al Returns*	
	YTD	1 Year	<u>10 Y</u>	'ear	
Stocks/Equities - Long-Term Objective			Annualized Cumulative		
US Stock Market (Russell 3000^)	11.6%	47.4%	14.4%	283%	
US Large Companies (Russell 1000^)	11.6%	46.3%	14.6%	290%	
US Small Companies (Russell 2000^)	12.1%	64.5%	11.9%	208%	
International Developed Countries (MSCI EAFE^)	10.2%	43.9%	6.7%	92%	
International Emerging Countries (MSCI Emerging^)	4.9%	51.2%	4.7%	58%	
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	YTD	1 Year	10 Y	'ear	
Bonds/Fixed Income - Short-Term Objective			Annualized	Cumulative	
Short Term US Govt (BBgBarc US Govt 1-3 Yr^^)	0.1%	0.3%	1.3%	13%	
Long Term US Govt (BBgBarc US Govt Long^^)	-10.8%	-13.8%	6.2%	82%	
US Aggregate Bond Market (BBgBarc Agg Bond^^)	-2.2%	-0.1%	3.3%	39%	

\*Total returns as of 05/25/2021 (including price appreciation and reinvestment of income) \*Past performance is no guarantee of future results

\*Data is for illustration purposes only; your performance will depend on your personal portfolio ^Stock index performance data obtained from ftserussell.com and msci.com ^Bond index performance data obtained from morningstar.com

### **FSG Notes**

In the coming months, Dimensional Fund Advisors (DFA) will be converting some of its taxmanaged mutual funds to exchange traded funds. These transactions will have no tax impact for investors holding the existing funds.

> Learn More about ETFs

## **Timely Topics**

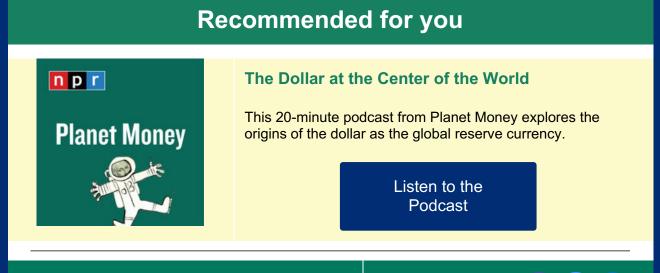
This section provides links to investment related topics you might find of interest.

How inflation erodes the value of your money. Is the Federal Reserve printing money? What is crypotcurrency? How it works, etc.

### **Knowledge Center**

The finance industry is no different from any other. It's filled with jargon and terminology that can sometimes be confusing. The Knowledge Center will help you learn more about commonly used terms within the industry.





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