

Market Performance

	YTD	Total Returns*		
		1 Year	10 Year	
Stocks/Equities - <u>Long-Term</u> Objective			Annualized	Cumulative
US Stock Market (<i>Russell 3000</i>)	14.2%	18.8%	13.9%	268%
US Large Companies (<i>Russell 1000</i>)	14.5%	19.0%	14.1%	275%
US Small Companies (<i>Russell 2000</i>)	10.3%	16.0%	11.2%	190%
International Developed Countries (<i>MSCI EAFE</i>)	2.0%	5.9%	5.9%	77%
International Emerging Countries (<i>MSCI Emerging</i>)	11.9%	19.4%	4.0%	48%
Bonds/Fixed Income - <u>Short-Term</u> Objective	YTD	1 Year	10 Year	
			Annualized	Cumulative
Short Term US Govt (<i>BBgBarc US Govt 1-3 Yr</i>)	3.1%	3.3%	1.3%	14%
Long Term US Govt (<i>BBgBarc US Govt Long</i>)	19.1%	16.3%	7.5%	107%
US Aggregate Bond Market (<i>BBgBarc Agg Bond</i>)	7.2%	7.3%	3.7%	43%

**Total returns as of 11/23/2020 (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*

Timely Topics

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

How presidential elections affect the stock market

The five countries with the lowest interest rates

Tesla gets a spot on the S&P500

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.

What is an "index"

The word index is often used in finance, but do you know what it actually

Annualized returns

Understanding how annualized (geometric) returns differ from average

means?

INDEX

(arithmetic) returns is key to building a portfolio with realistic expectations.

ANNUALIZED
RETURNS

Recommended for you



The Big Short

An excellent movie detailing the role the real estate bubble played in the 2008 financial crisis.

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