

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> [^])	11.6%	47.4%	14.4%	283%
US Large Companies (<i>Russell 1000</i> [^])	11.6%	46.3%	14.6%	290%
US Small Companies (<i>Russell 2000</i> [^])	12.1%	64.5%	11.9%	208%
International Developed Countries (<i>MSCI EAFE</i> [^])	10.2%	43.9%	6.7%	92%
International Emerging Countries (<i>MSCI Emerging</i> [^])	4.9%	51.2%	4.7%	58%
Bonds/Fixed Income - <u>Short-Term</u> Objective	YTD	1 Year	10 Year	
Short Term US Govt (<i>BBgBarc US Govt 1-3 Yr</i> ^{^^})	0.1%	0.3%	1.3%	13%
Long Term US Govt (<i>BBgBarc US Govt Long</i> ^{^^})	-10.8%	-13.8%	6.2%	82%
US Aggregate Bond Market (<i>BBgBarc Agg Bond</i> ^{^^})	-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 tax-managed 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 cryptocurrency? 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.

What is a Cap?

Have you ever wondered why advisors are talking about caps? This article will answer your questions.

[CAPS](#)

What are investment expenses?

Investment expenses go beyond advisory fees and trading commissions. Learn about the internal (and somewhat hidden) expenses in portfolios."

[EXPENSES](#)

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Planet Money



The Dollar at the Center of the World

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