

Market Performance

	YTD	Total Returns*		
		1 Year	10 Year Annualized	10 Year Cumulative
Stocks/Equities - Long-Term Objective				
US Stock Market (<i>Russell 3000</i>)	5.6%	21.4%	13.6%	259%
US Large Companies (<i>Russell 1000</i>)	4.9%	20.5%	13.8%	263%
US Small Companies (<i>Russell 2000</i>)	14.9%	35.7%	12.0%	211%
International Developed Countries (<i>MSCI EAFE</i>)	4.1%	13.6%	5.8%	75%
International Emerging Countries (<i>MSCI Emerging</i>)	10.9%	32.9%	5.3%	68%
Bonds/Fixed Income - Short-Term Objective				
Short Term US Govt (<i>BBgBarc US Govt 1-3 Yr</i>)	0.0%	2.7%	1.3%	14%
Long Term US Govt (<i>BBgBarc US Govt Long</i>)	-8.7%	0.4%	7.2%	100%
US Aggregate Bond Market (<i>BBgBarc Agg Bond</i>)	-1.8%	3.5%	3.7%	44%

**Total returns as of 02/19/2021 (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*

Timely Topics

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

Jeff Bezos is stepping down - Amazon's biggest accomplishments

How a battle between Wall Street and Reddit users made GameStop stock skyrocket

US Senate votes to confirm Yellen as first female Treasury chief

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.

Stocks vs. Bonds

Learn the fundamental differences between these two investment vehicles.

What is a Mutual Fund

Do you know how a mutual fund differs from individual stocks? Do you know

how mutual funds are managed? Learn more about them here.

STOCKS VS
BONDS

MUTUAL
FUNDS

Recommended for you



Enron: The Smartest Guys in the Room

A movie that recounts the business scandals and the collapse of Enron in 2001. Rentable on Amazon and other platforms. Also available as a book.

BUY/RENT IT
HERE

FINANCIAL SERVICE GROUP, INC.
ToYourWealth.com
262-554-4500

