



## Domestic Stock Market Review

May, 2026

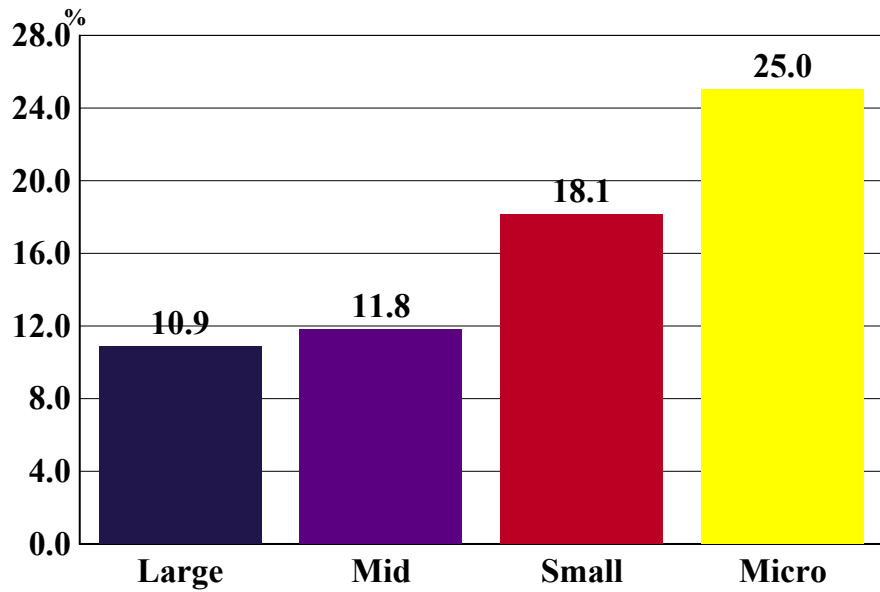
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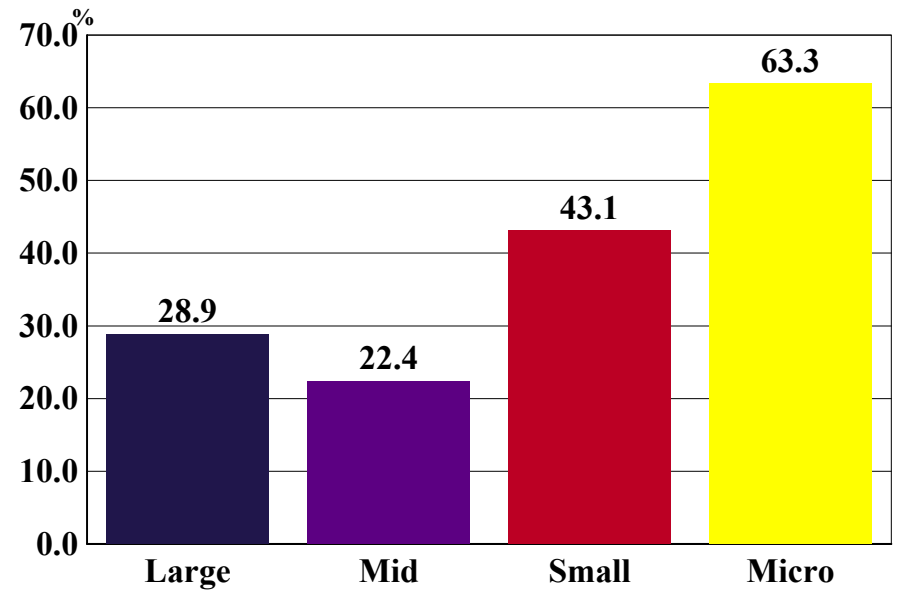
## U.S. Stock Market

## Company Size Returns For Periods Ending May, 2026

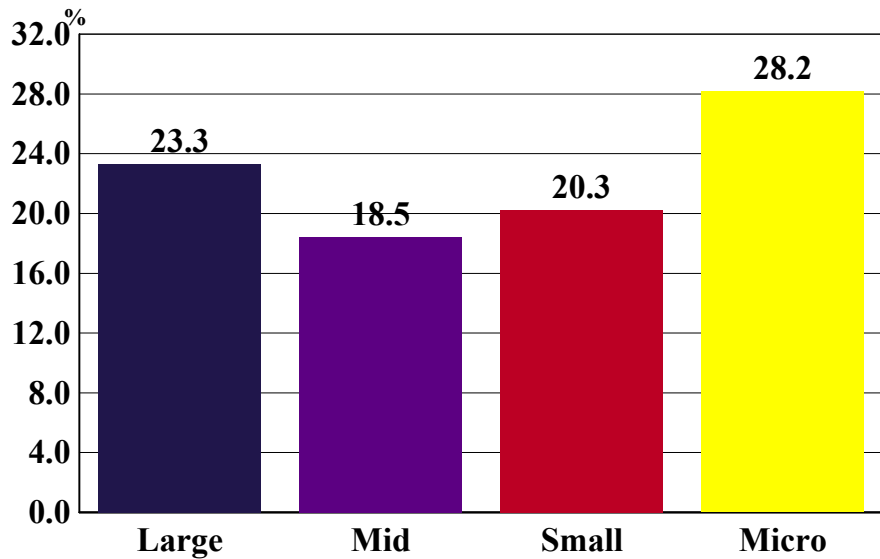
YTD Returns



1 Year Returns

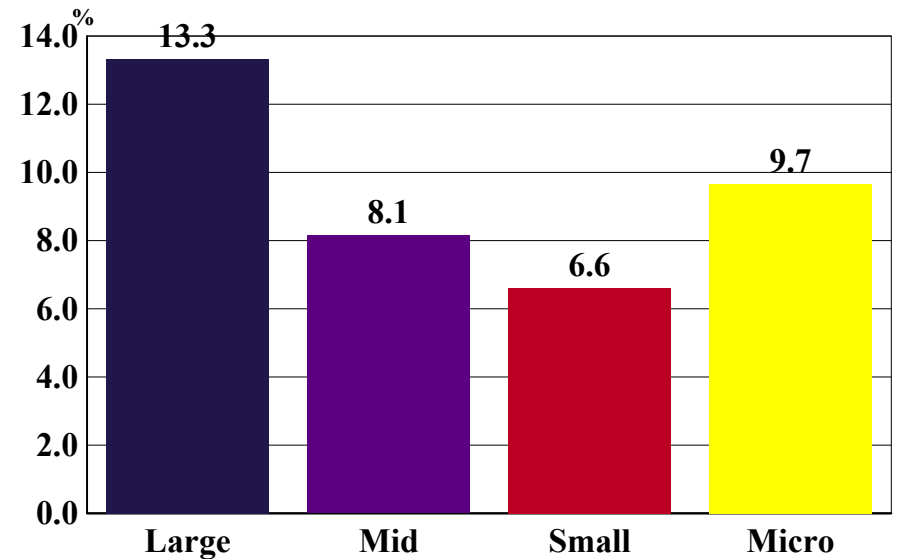


3 Year Returns \*



\* Annualized Returns

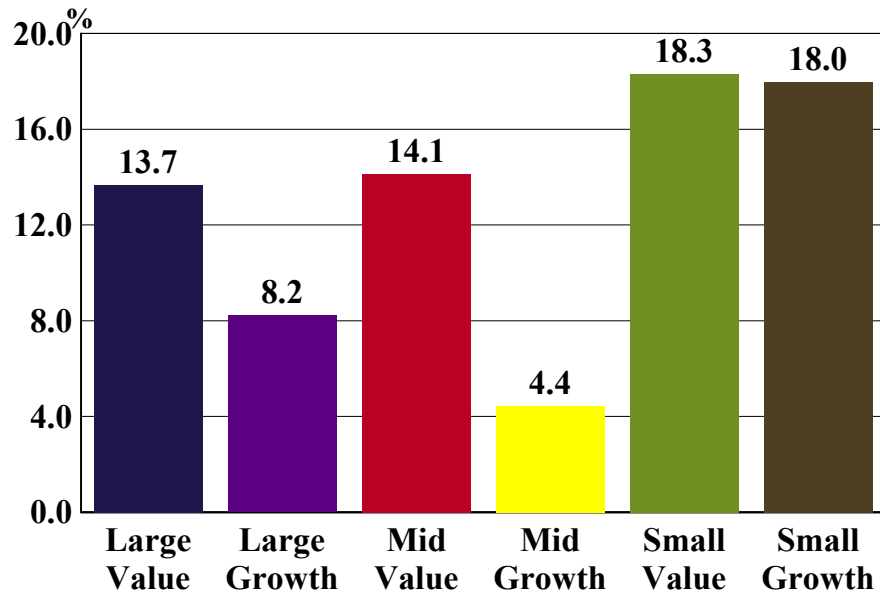
5 Year Returns \*



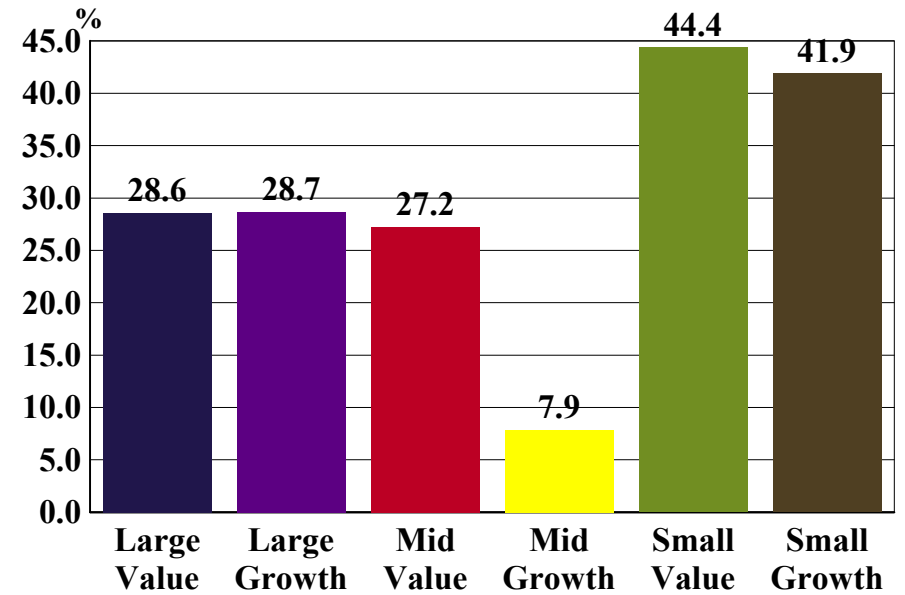
\* Annualized Returns

## Investment Approach Returns For Periods Ending May, 2026

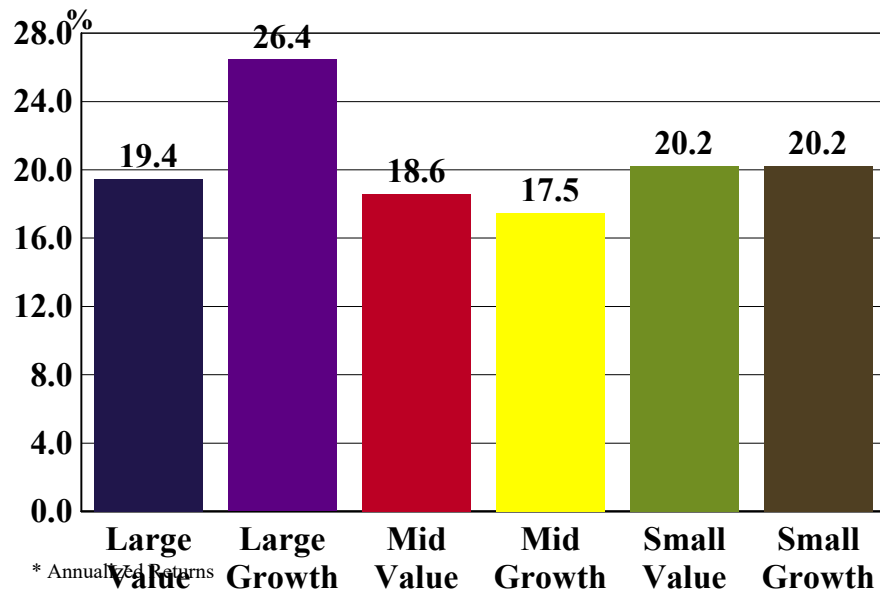
**YTD Returns**



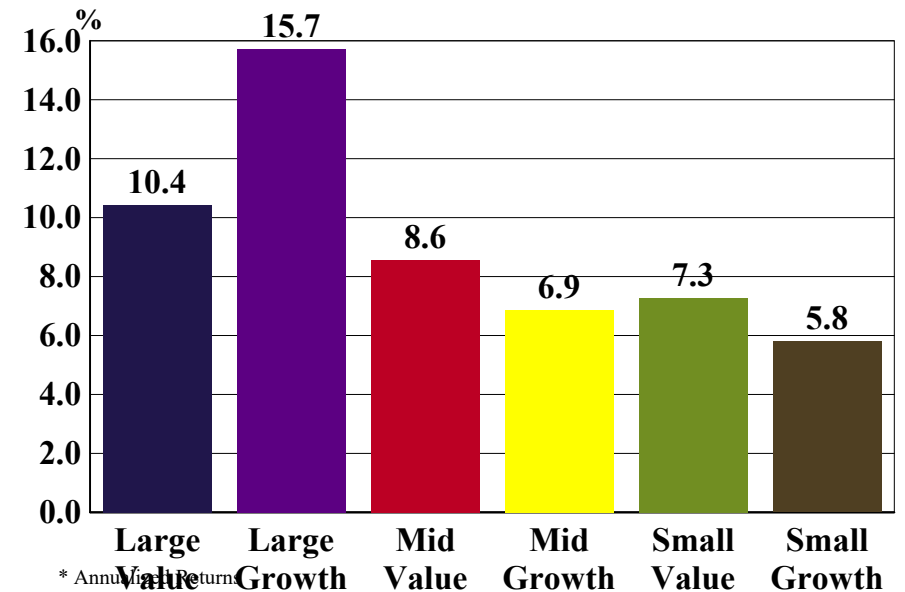
**1 Year Returns**



**3 Year Returns \***



**5 Year Returns \***

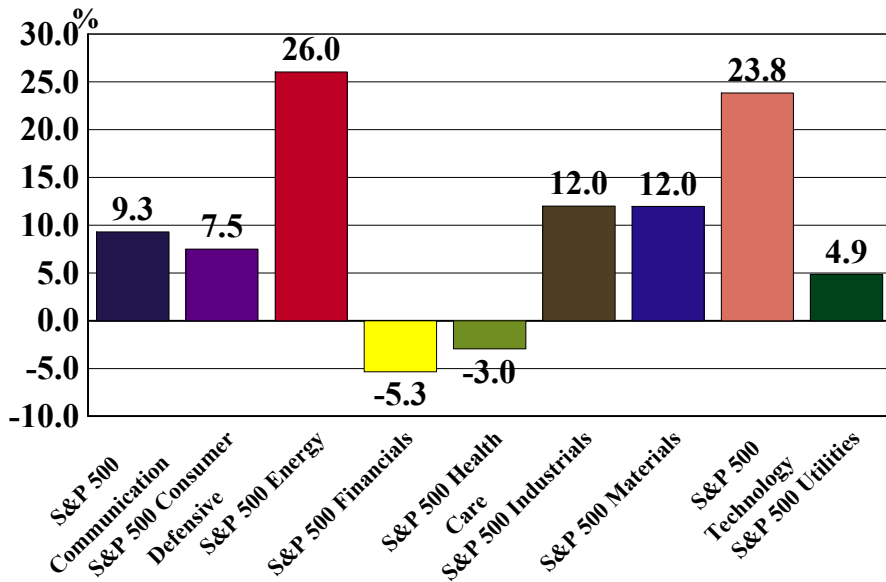


\* Annualized Returns

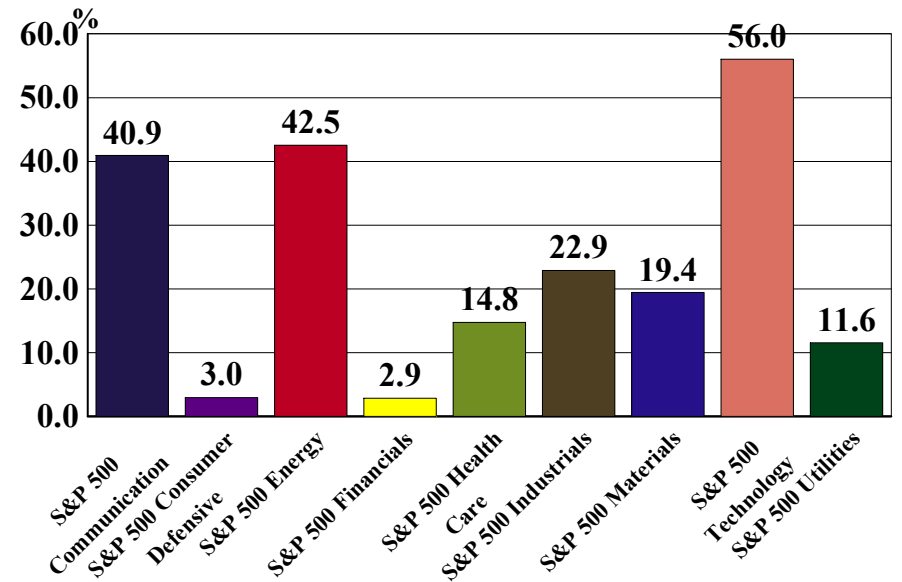
\* Annualized Returns

# Stock Sector Returns For Periods Ending May, 2026

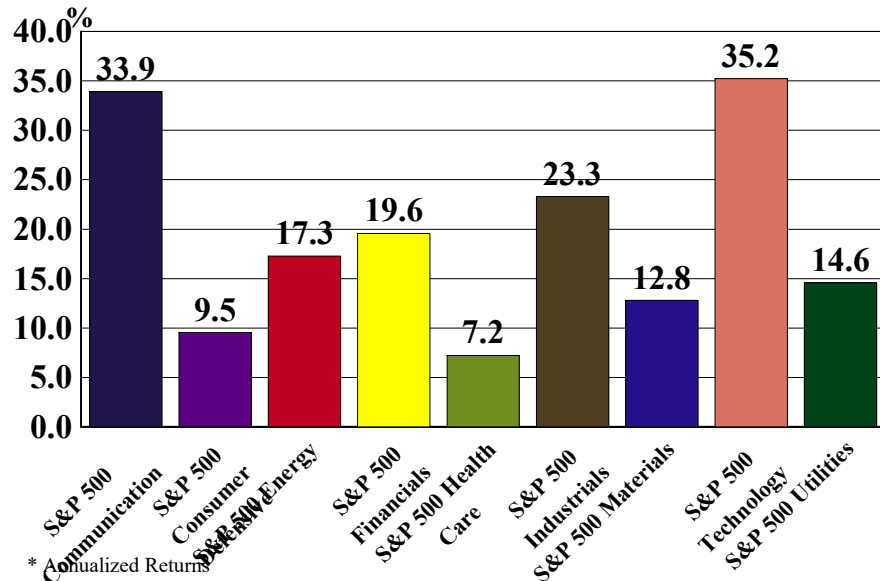
YTD Returns



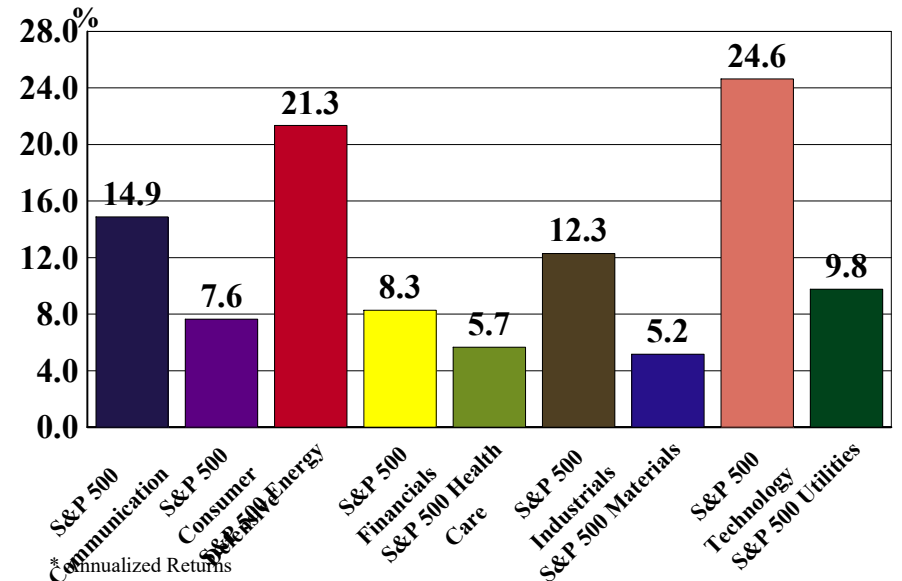
1 Year Returns



3 Year Returns \*



5 Year Returns \*

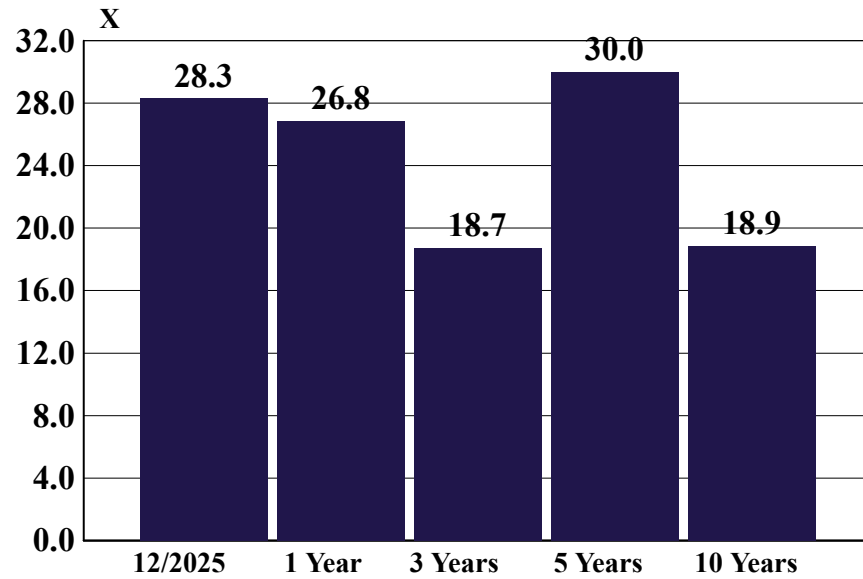


\* Annualized Returns

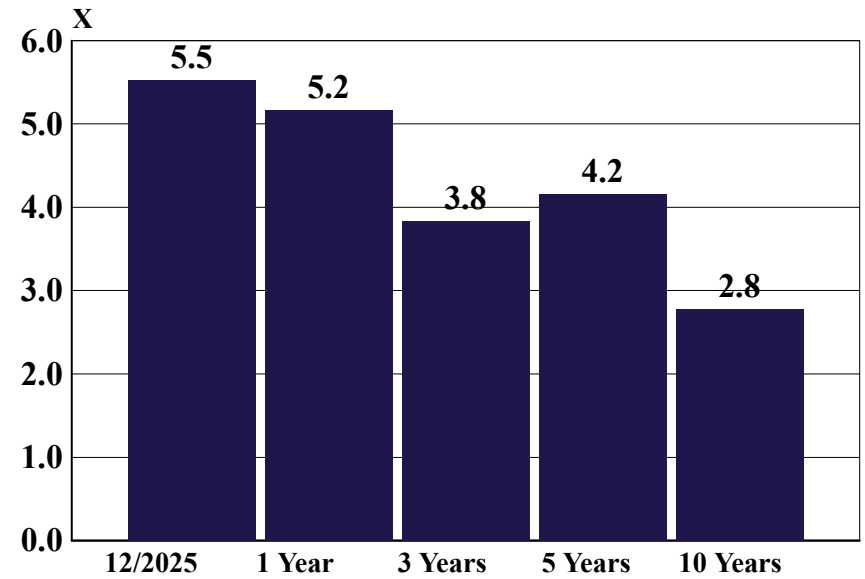
\* Annualized Returns

# SP 500 Portfolio Characteristics Ending December, 2025

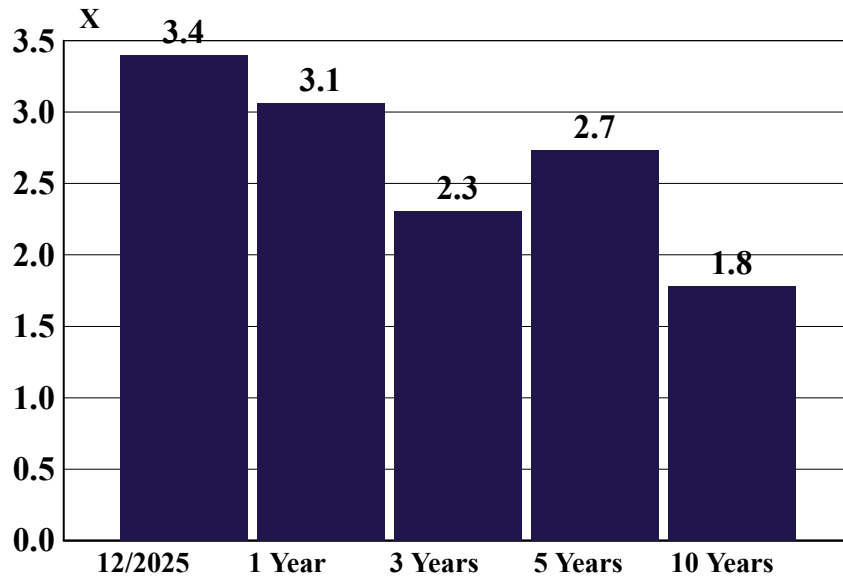
## Price / Operating Earnings



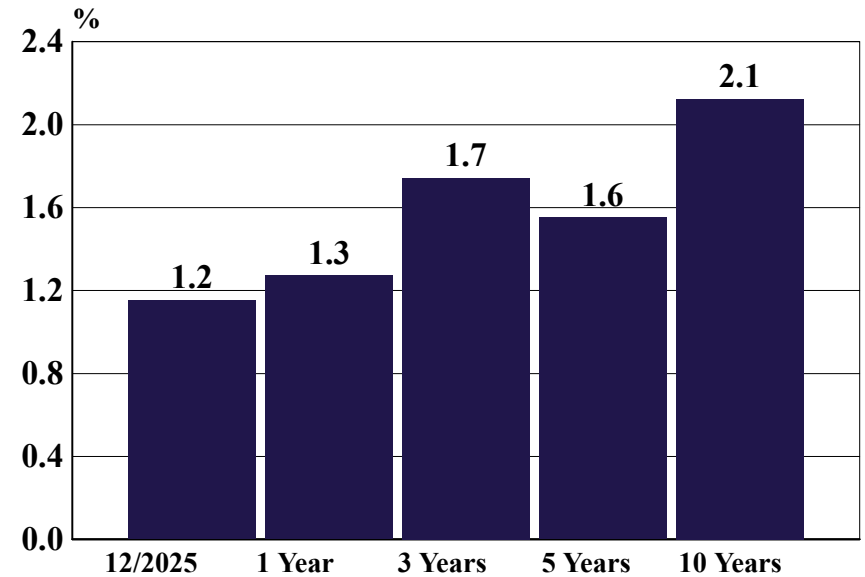
## Price / Book Value



## Price / Sales

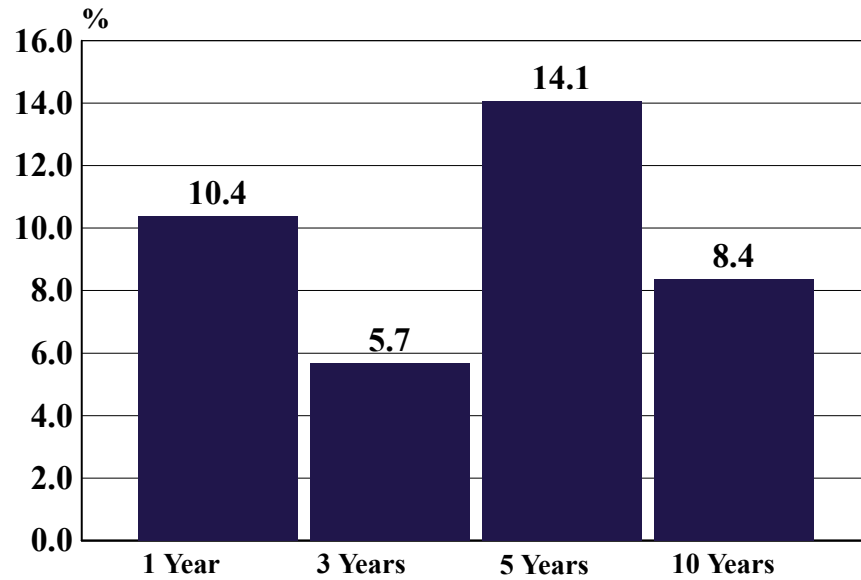


## Dividend Yield

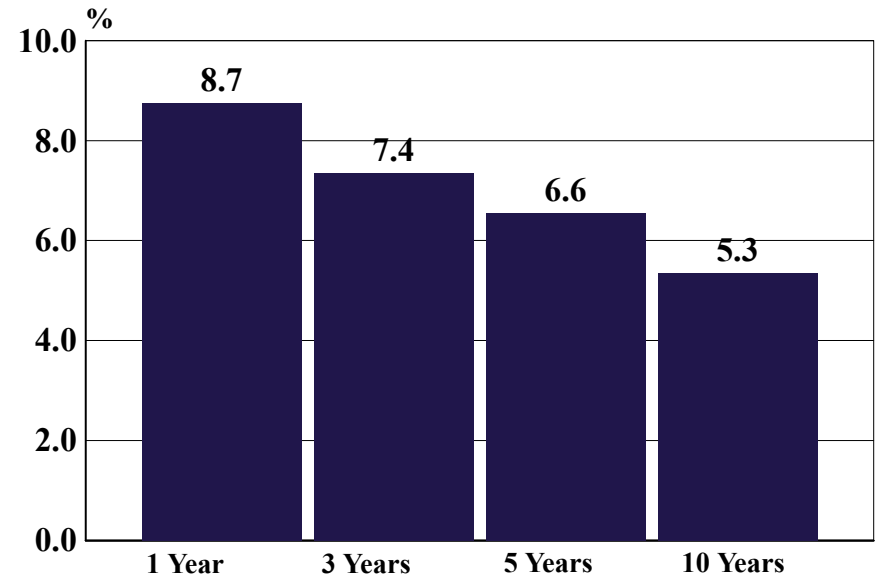


# SP 500 Portfolio Characteristics Ending December, 2025

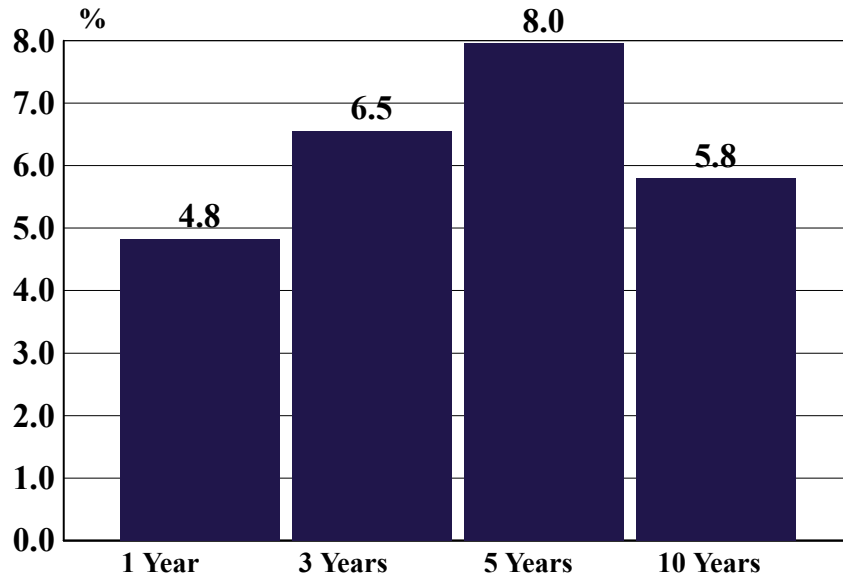
## Operating Earnings Growth



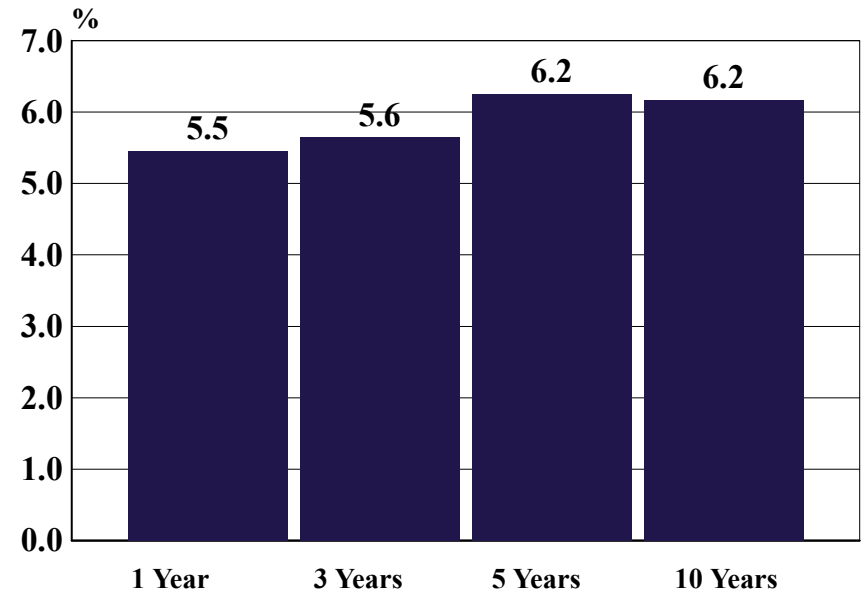
## Book Value Growth



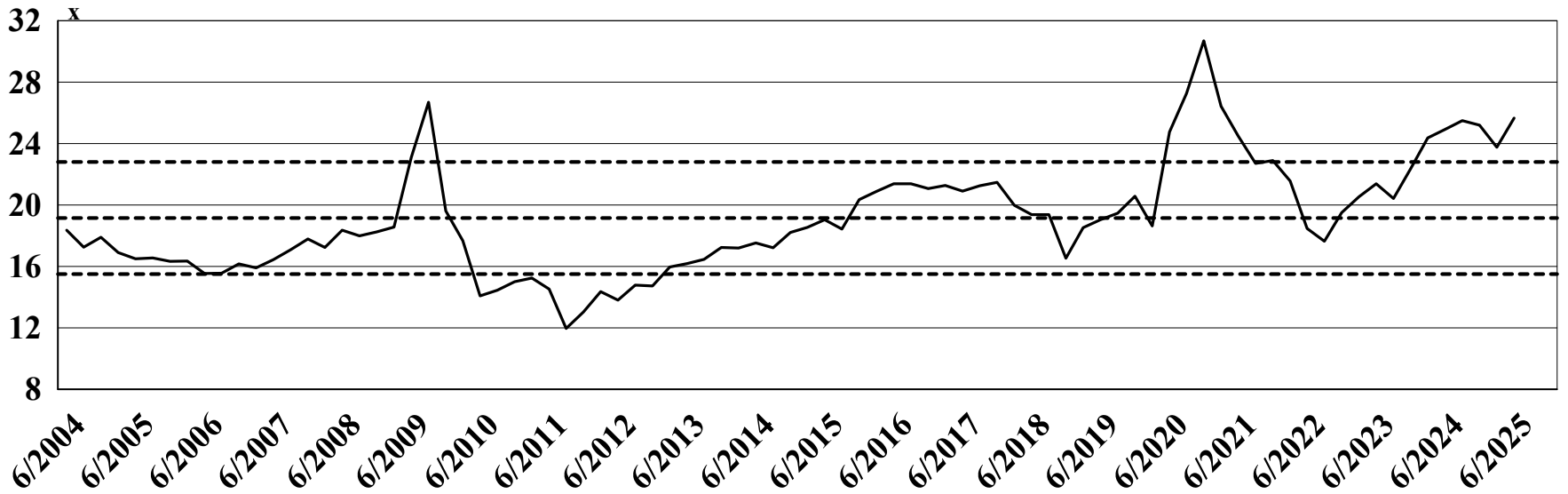
## Sales Growth



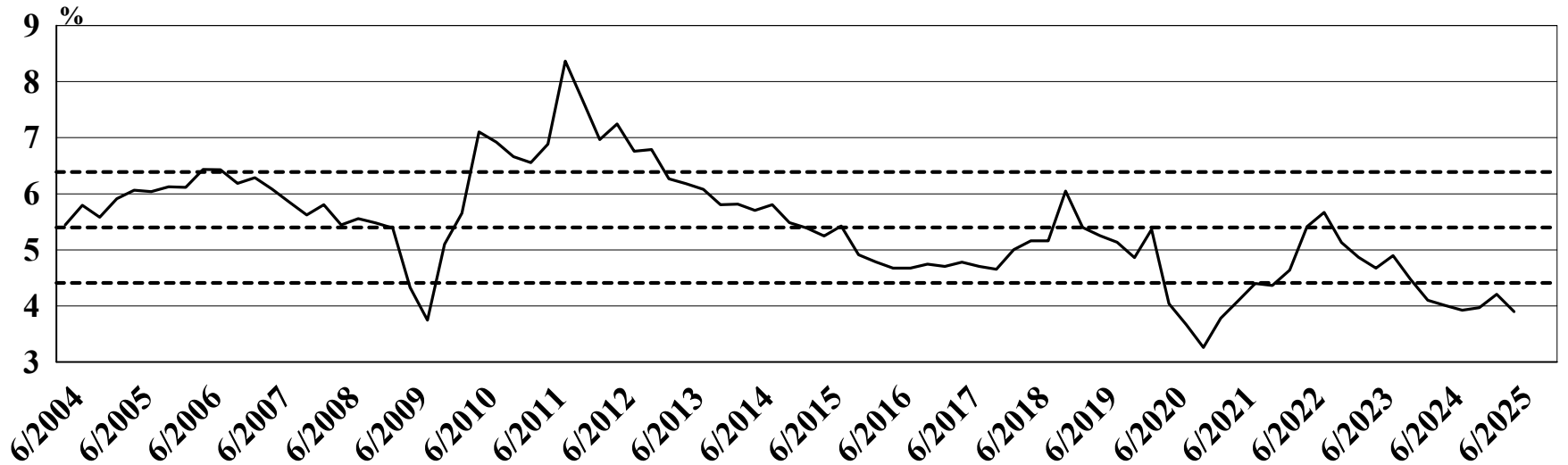
## Dividend Growth



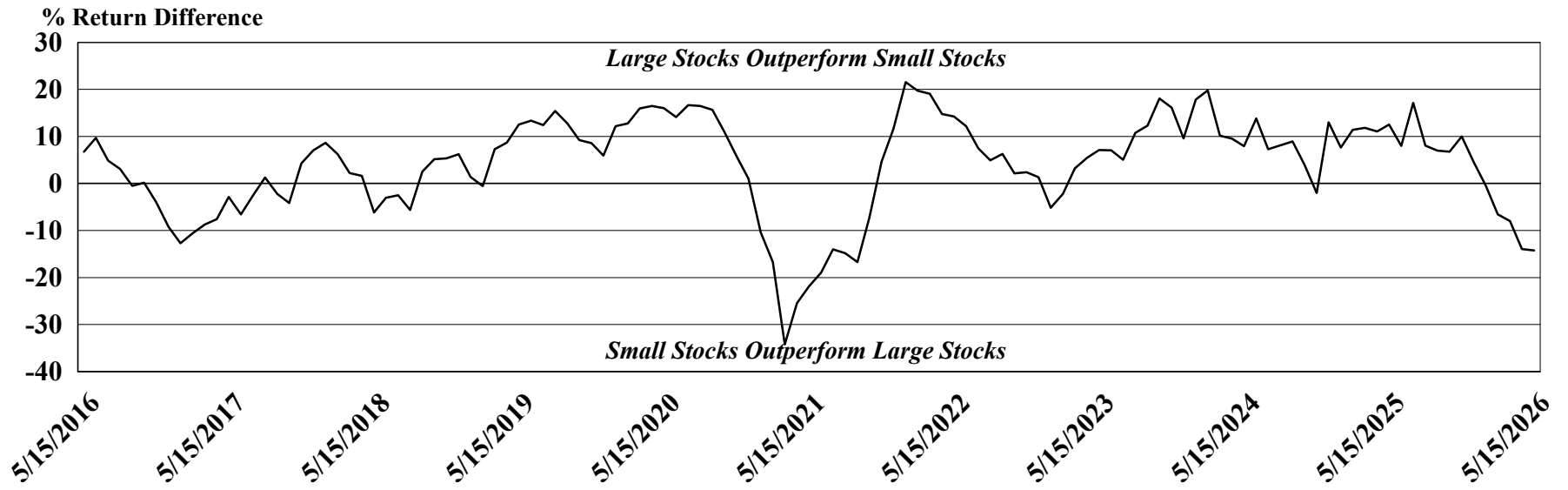
S&P 500 Price/Earnings Ratio



S&P 500 Operating Margin



## Large Vs. Small Stocks Rolling 12-Month Return Difference



## Value Vs. Growth Stocks: Rolling 12-Month Return Difference

