



Domestic Stock Market Review

December, 2024

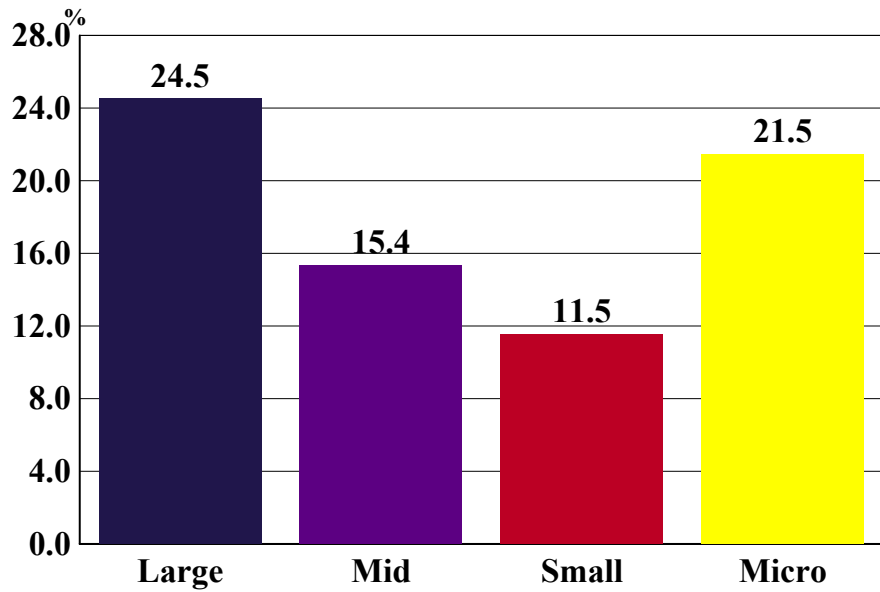
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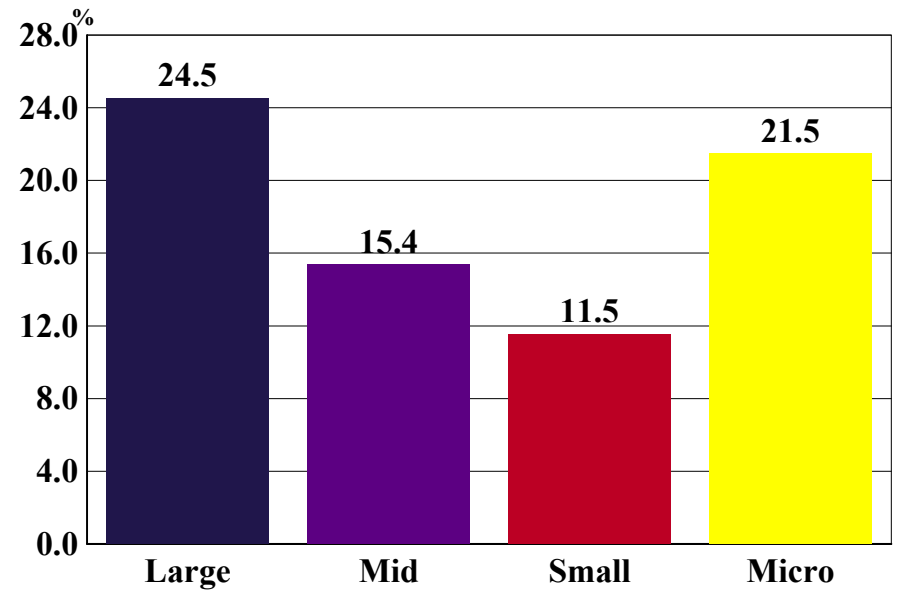
U.S. Stock Market

Company Size Returns For Periods Ending December, 2024

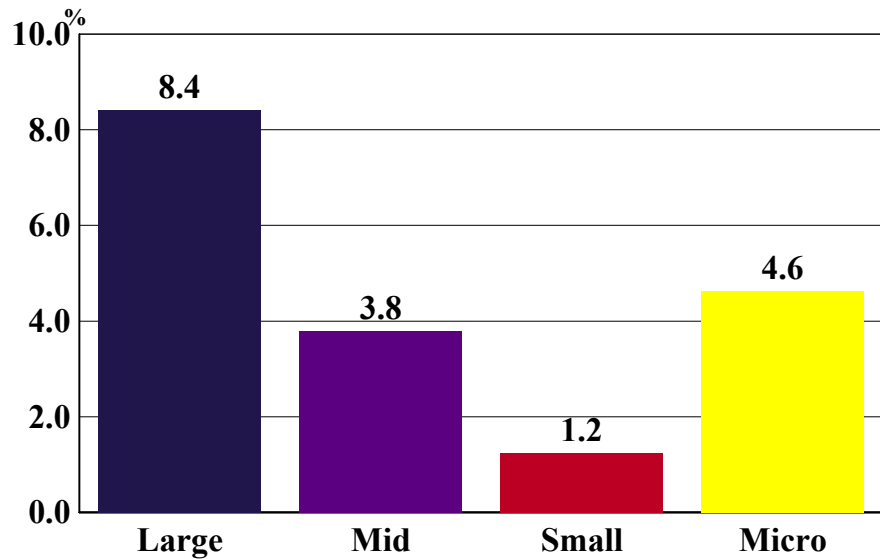
YTD Returns



1 Year Returns

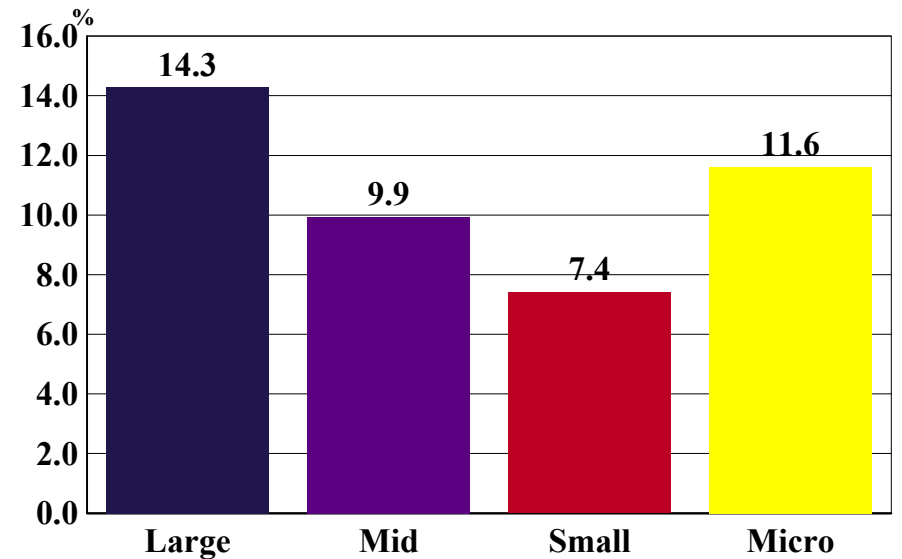


3 Year Returns *



* Annualized Returns

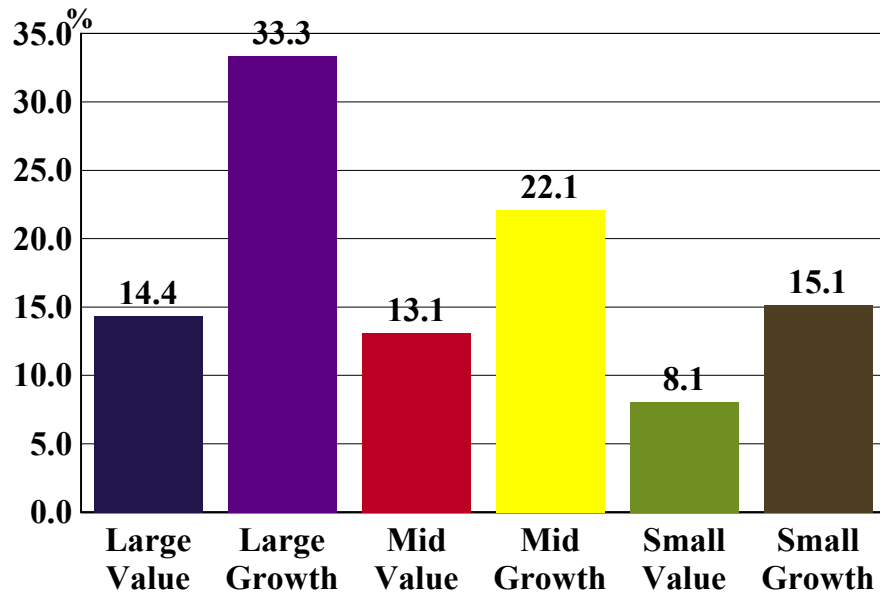
5 Year Returns *



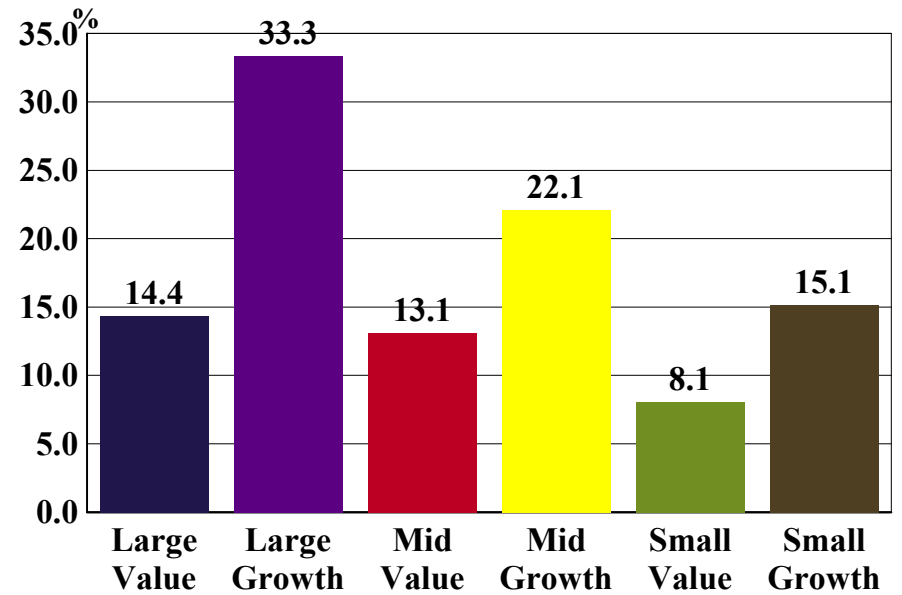
* Annualized Returns

Investment Approach Returns For Periods Ending December, 2024

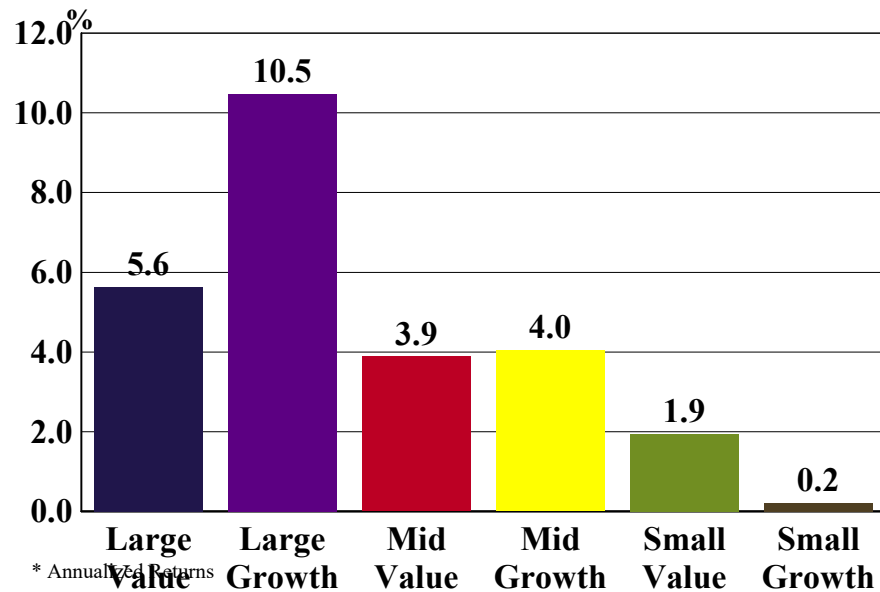
YTD Returns



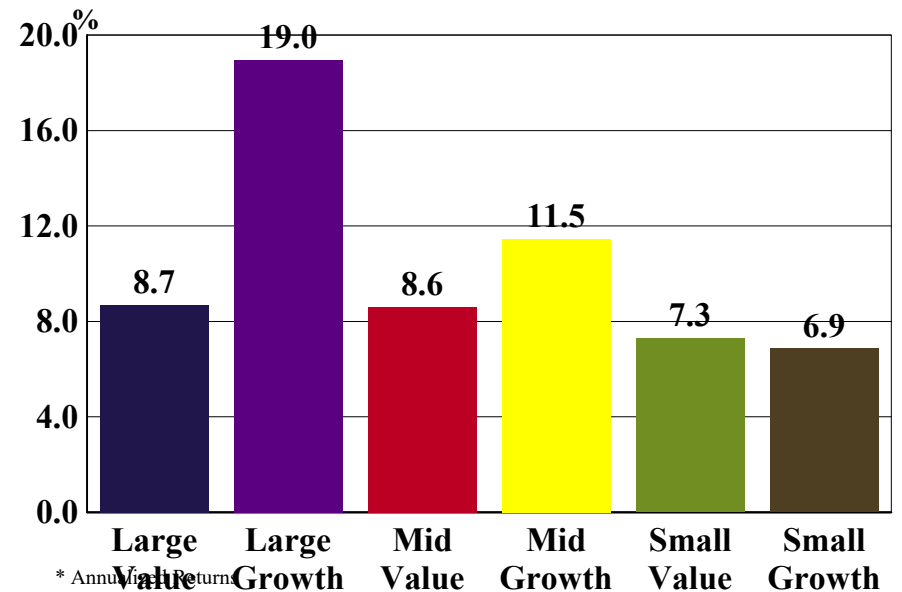
1 Year Returns



3 Year Returns *

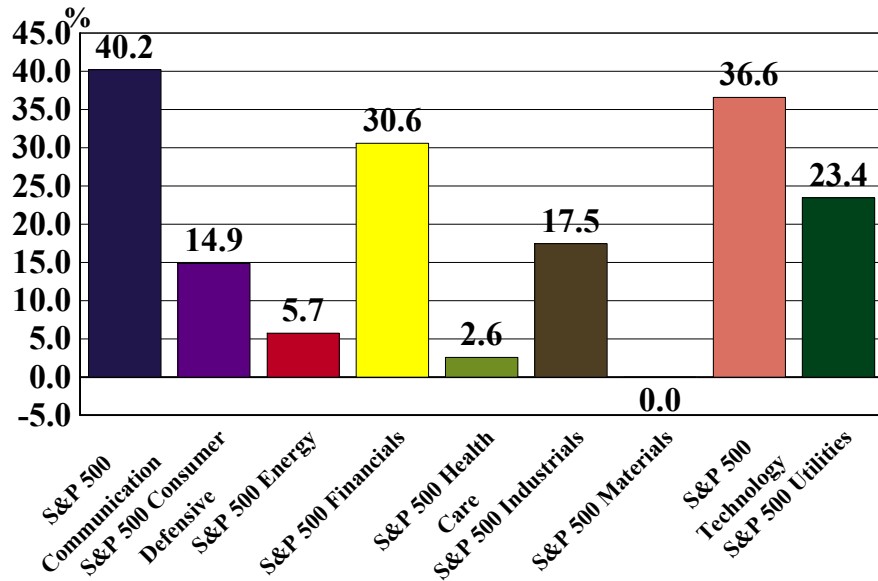


5 Year Returns *

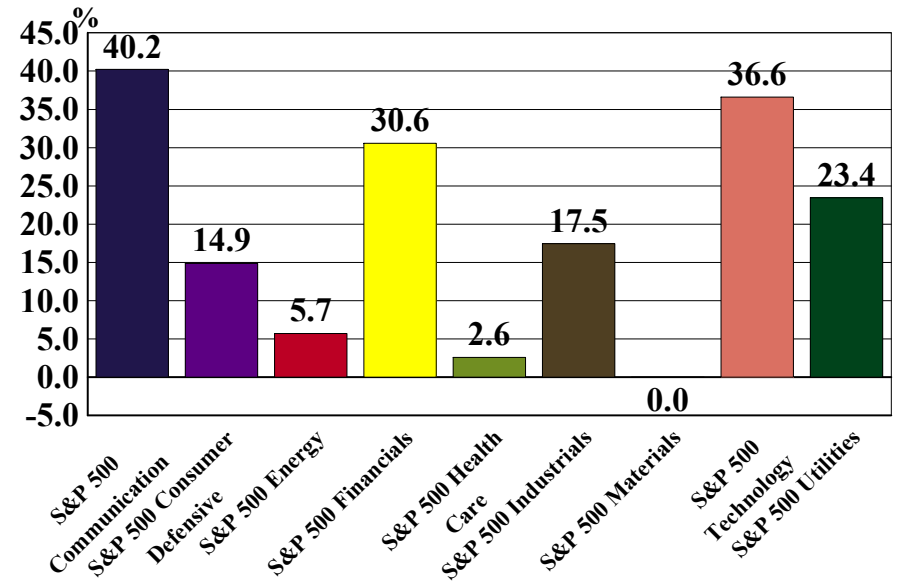


Stock Sector Returns For Periods Ending December, 2024

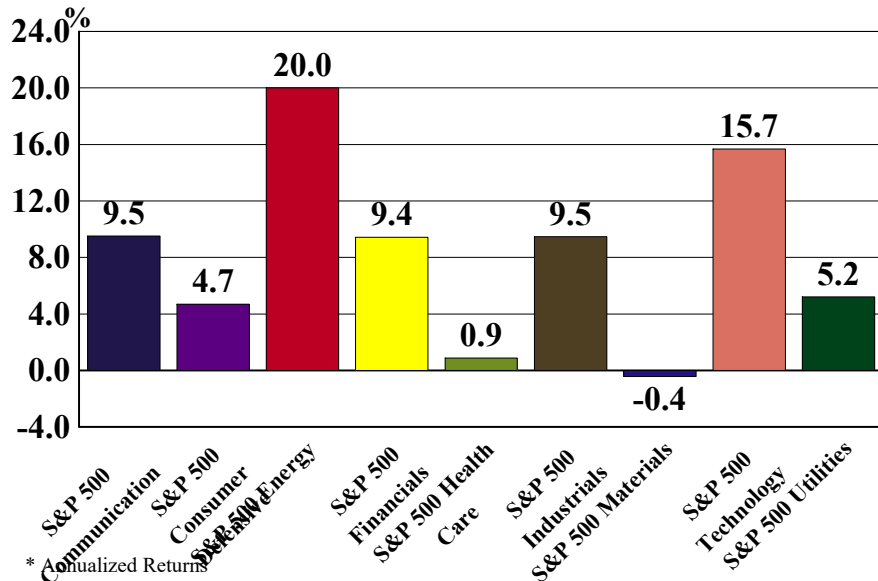
YTD Returns



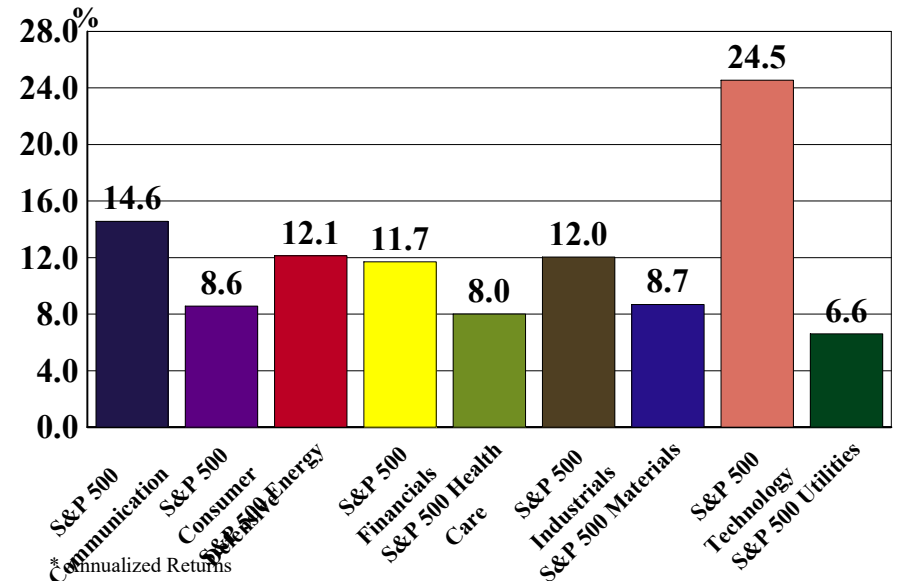
1 Year Returns



3 Year Returns *



5 Year Returns *

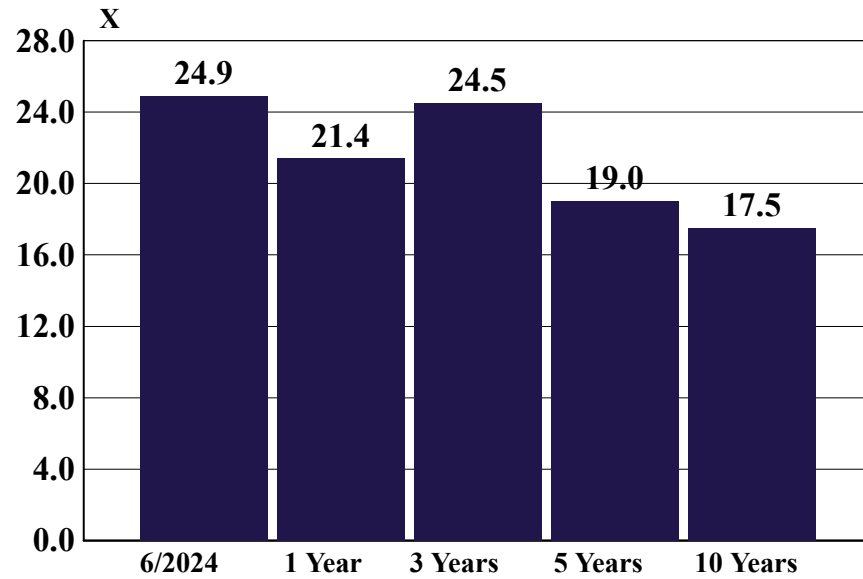


* Annualized Returns

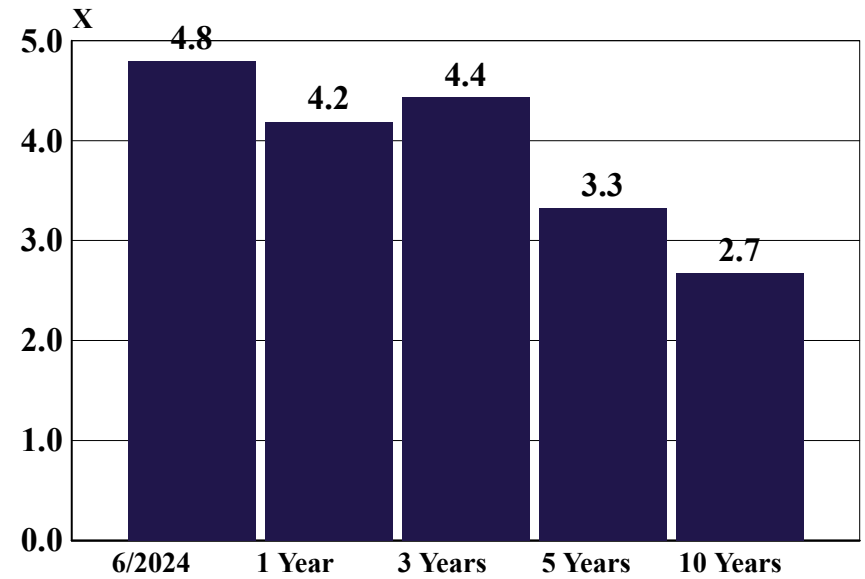
* Annualized Returns

SP 500 Portfolio Characteristics Ending June, 2024

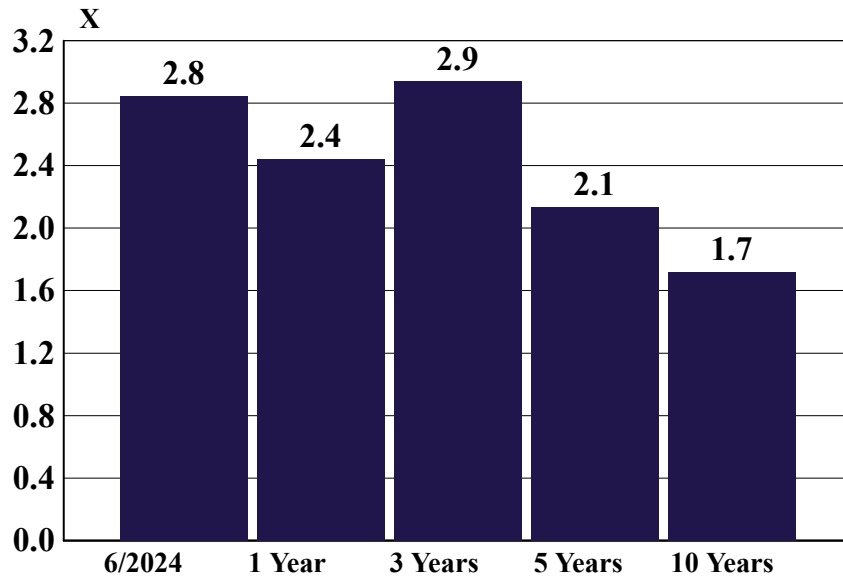
Price / Operating Earnings



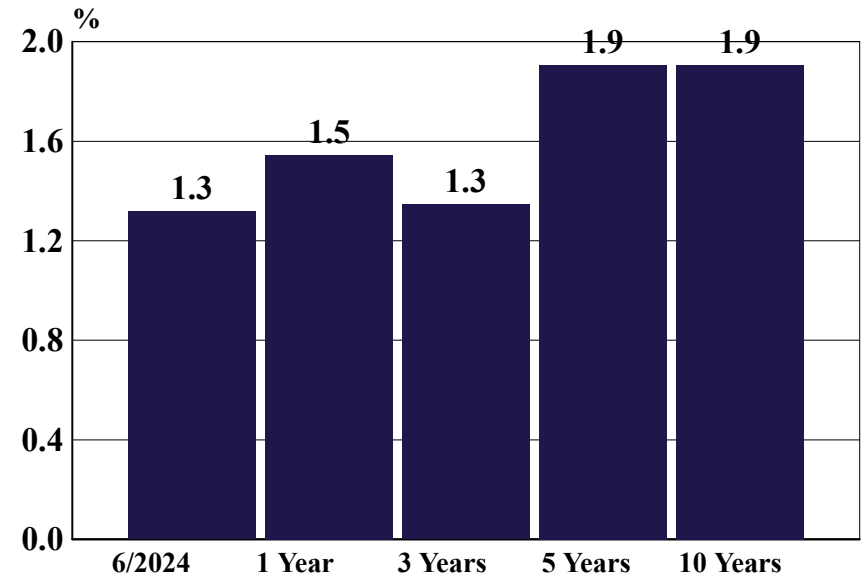
Price / Book Value



Price / Sales

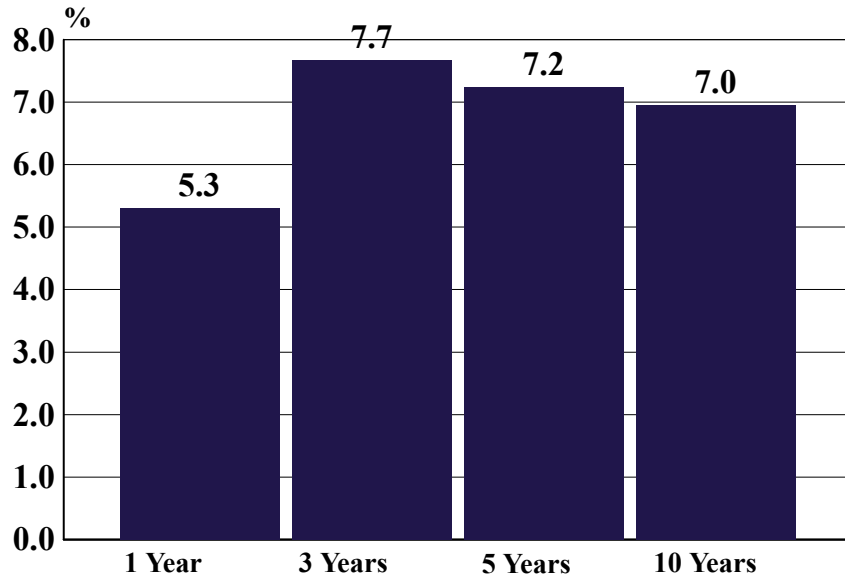


Dividend Yield

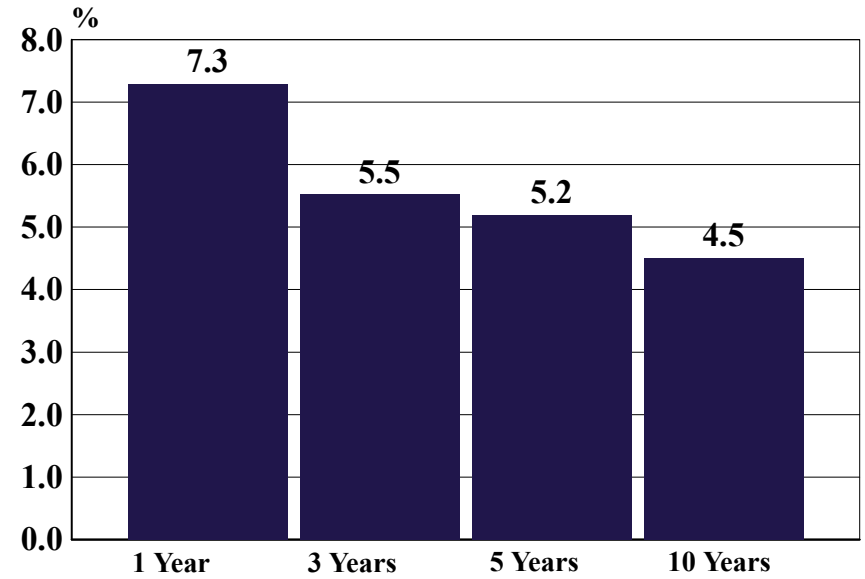


SP 500 Portfolio Characteristics Ending June, 2024

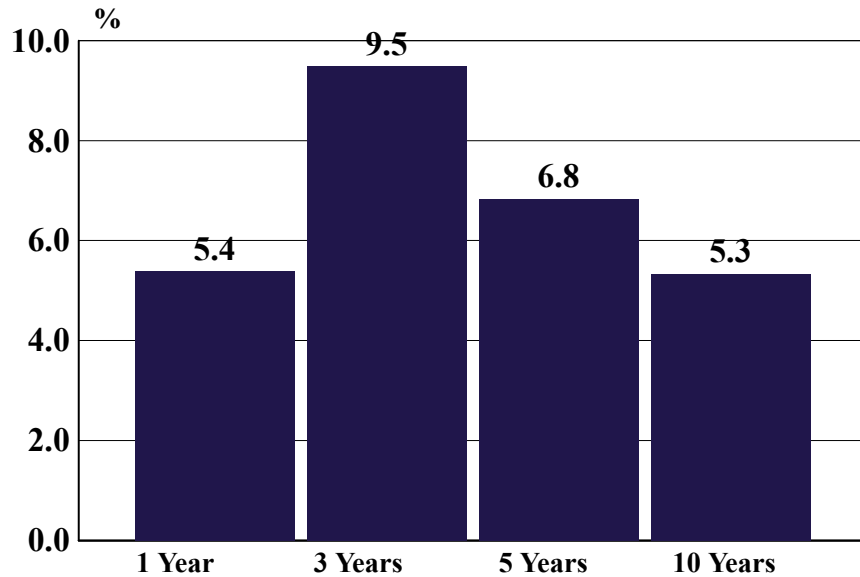
Operating Earnings Growth



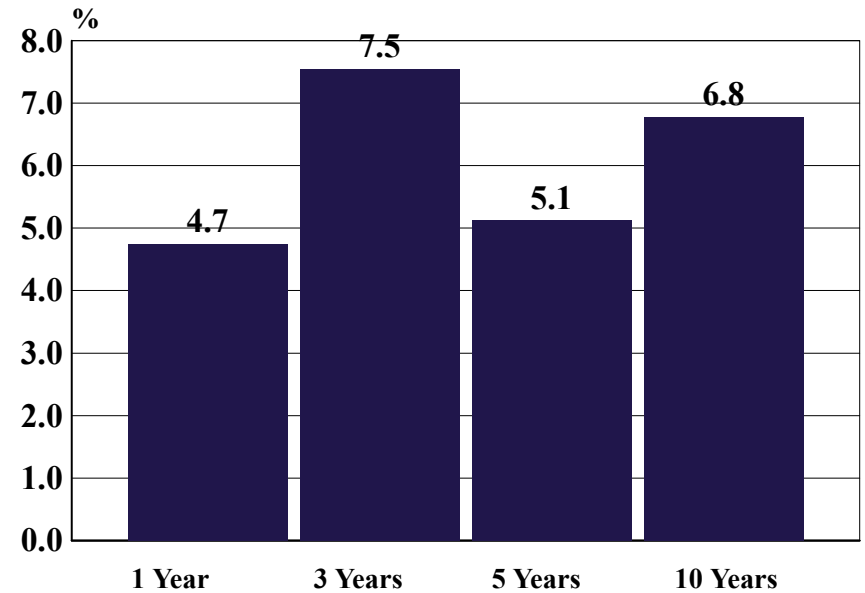
Book Value Growth



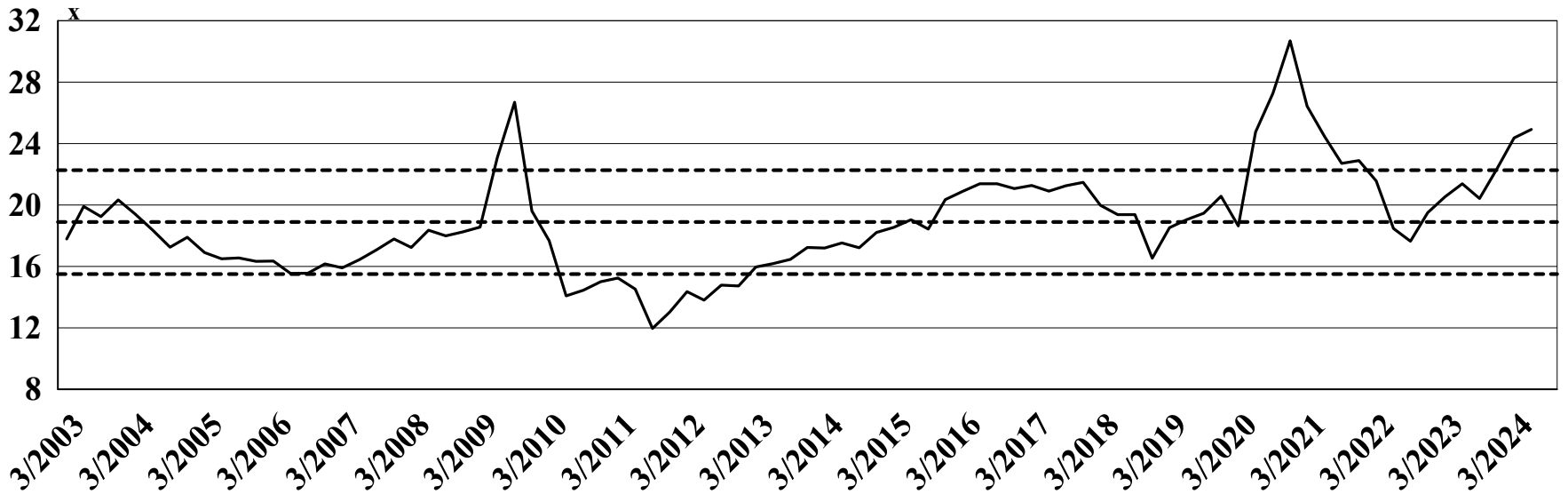
Sales Growth



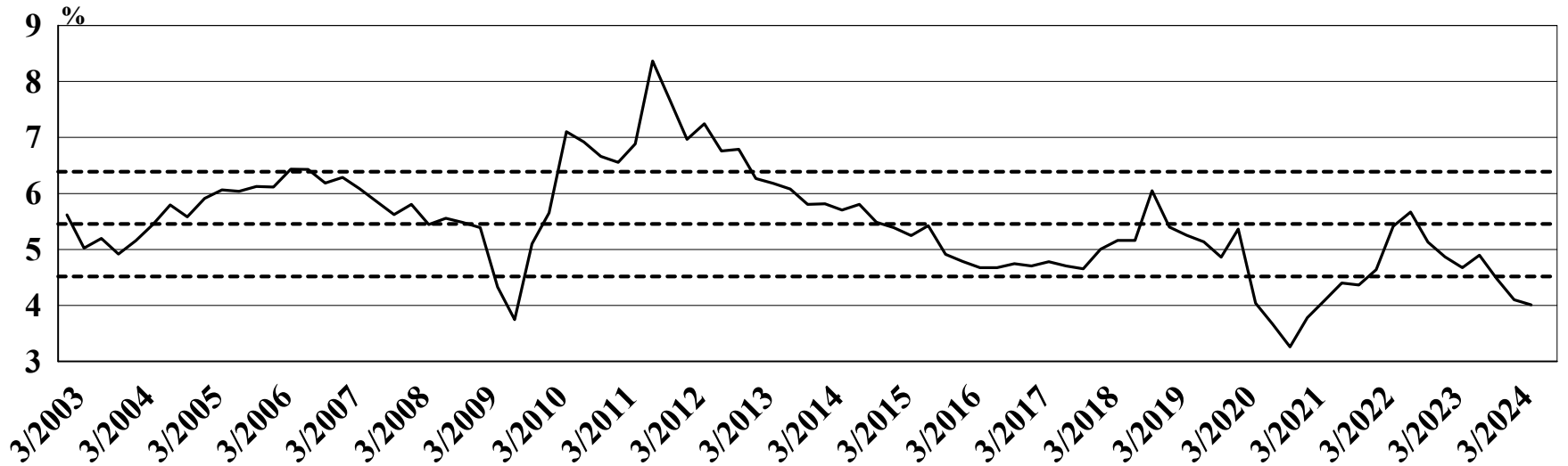
Dividend Growth



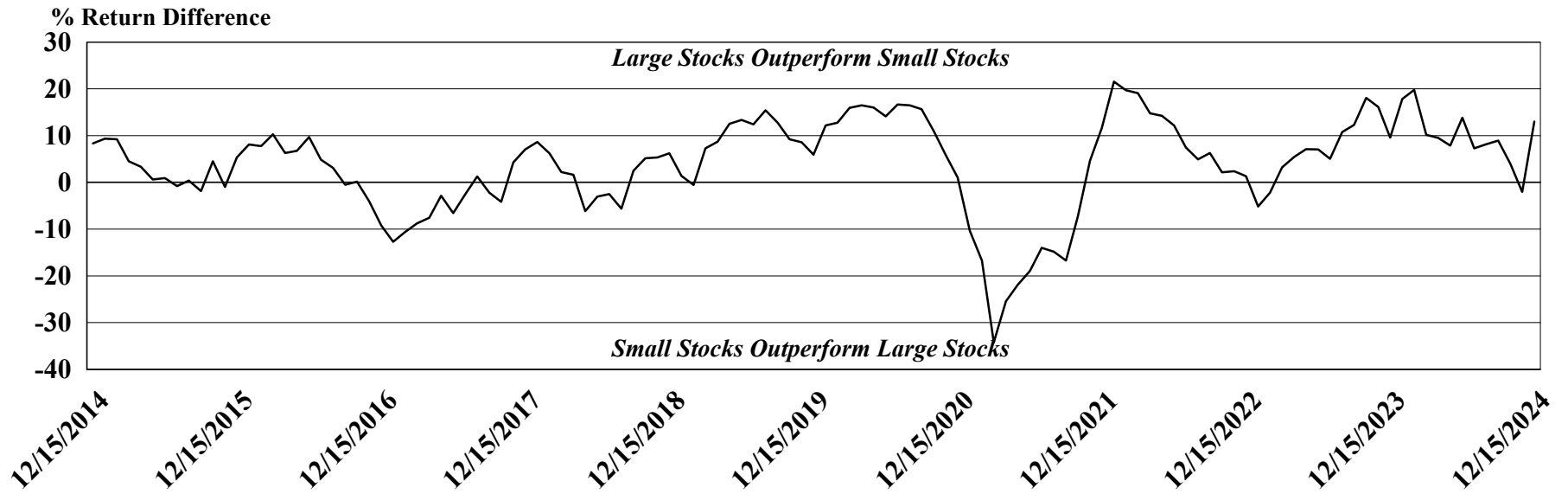
S&P 500 Price/Earnings Ratio



S&P 500 Operating Margin



Large Vs. Small Stocks Rolling 12-Month Return Difference



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

