

# Monthly Benchmark Returns



Calendar Year Returns										
2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
US GOV'T BONDS 17.97%	EMERGING MARKET 78.51%	REAL ESTATE 26.93%	US GOV'T BONDS 15.59%	REAL ESTATE 18.93%	SMALL CAP STOCKS 41.31%	REAL ESTATE 27.24%	REAL ESTATE 2.14%	NATURAL RESOURCES 30.87%	EMERGING MARKET 37.28%	EMERGING MARKET 3.34%
US CORP BONDS 0.96%	MID-CAP STOCKS 37.38%	MID-CAP STOCKS 26.64%	US CORP BONDS 9.15%	EMERGING MARKET 18.22%	MID-CAP STOCKS 33.50%	LARGE CAP STOCKS 13.69%	US GOV'T BONDS 1.76%	SMALL CAP STOCKS 26.56%	FOREIGN STOCKS 25.03%	LARGE CAP STOCKS 1.83%
SMALL CAP STOCKS -31.07%	NATURAL RESOURCES 37.54%	SMALL CAP STOCKS 26.31%	REAL ESTATE 6.05%	MID-CAP STOCKS 17.88%	LARGE CAP STOCKS 32.39%	MID-CAP STOCKS 9.77%	LARGE CAP STOCKS 1.38%	MID-CAP STOCKS 20.74%	LARGE CAP STOCKS 21.83%	FOREIGN STOCKS 0.28%
MID-CAP STOCKS -36.23%	FOREIGN STOCKS 31.78%	NATURAL RESOURCES 23.88%	LARGE CAP STOCKS 2.11%	FOREIGN STOCKS 17.32%	FOREIGN STOCKS 22.78%	US CORP BONDS 8.66%	US CORP BONDS -0.74%	LARGE CAP STOCKS 11.96%	MID-CAP STOCKS 16.24%	SMALL CAP STOCKS -1.44%
LARGE CAP STOCKS -37.00%	REAL ESTATE 30.81%	EMERGING MARKET 18.88%	SMALL CAP STOCKS 1.02%	SMALL CAP STOCKS 16.33%	NATURAL RESOURCES 16.49%	SMALL CAP STOCKS 5.76%	FOREIGN STOCKS -0.81%	EMERGING MARKET 11.19%	SMALL CAP STOCKS 13.23%	US GOV'T BONDS -1.58%
REAL ESTATE -40.07%	LARGE CAP STOCKS 26.46%	LARGE CAP STOCKS 15.06%	MID-CAP STOCKS -1.73%	LARGE CAP STOCKS 16.00%	REAL ESTATE 1.77%	US GOV'T BONDS 3.22%	SMALL CAP STOCKS -2.00%	REAL ESTATE 7.56%	REAL ESTATE 9.84%	MID-CAP STOCKS -1.69%
NATURAL RESOURCES -42.55%	SMALL CAP STOCKS 25.57%	US CORP BONDS 9.37%	NATURAL RESOURCES -7.35%	US CORP BONDS 11.85%	US GOV'T BONDS -1.87%	EMERGING MARKET -2.19%	MID-CAP STOCKS -2.18%	US CORP BONDS 6.37%	US CORP BONDS 7.29%	US CORP BONDS -3.25%
FOREIGN STOCKS -43.38%	US CORP BONDS 12.79%	US GOV'T BONDS 9.37%	FOREIGN STOCKS -12.14%	NATURAL RESOURCES 2.20%	US CORP BONDS -2.38%	FOREIGN STOCKS -4.90%	EMERGING MARKET -14.92%	US GOV'T BONDS 1.35%	US GOV'T BONDS 1.30%	NATURAL RESOURCES -7.71%
EMERGING MARKET -53.33%	US GOV'T BONDS -6.03%	FOREIGN STOCKS 7.75%	EMERGING MARKET -18.42%	US GOV'T BONDS 2.19%	EMERGING MARKET -2.60%	NATURAL RESOURCES -9.77%	NATURAL RESOURCES -24.28%	FOREIGN STOCKS 1.00%	NATURAL RESOURCES 1.23%	REAL ESTATE -9.34%

Trailing Annualized (02/28/2018)		
3 Year	5 Year	10 Year
LARGE CAP STOCKS 11.12%	LARGE CAP STOCKS 14.72%	SMALL CAP STOCKS 10.84%
SMALL CAP STOCKS 10.59%	SMALL CAP STOCKS 14.03%	MID-CAP STOCKS 10.34%
MID-CAP STOCKS 9.08%	MID-CAP STOCKS 12.80%	LARGE CAP STOCKS 9.42%
EMERGING MARKET 8.95%	FOREIGN STOCKS 7.05%	REAL ESTATE 6.21%
FOREIGN STOCKS 5.64%	REAL ESTATE 6.13%	US CORP BONDS 5.77%
US CORP BONDS 2.36%	EMERGING MARKET 5.01%	US GOV'T BONDS 2.80%
REAL ESTATE 2.00%	US CORP BONDS 3.15%	FOREIGN STOCKS 2.68%
US GOV'T BONDS 0.59%	US GOV'T BONDS 0.80%	EMERGING MARKET 2.44%
NATURAL RESOURCES -2.88%	NATURAL RESOURCES -1.45%	NATURAL RESOURCES -1.22%

**Large Cap Stocks** – Standard & Poor's 500®

**Mid Cap Stocks** – Standard & Poor's MidCap 400

**Small Cap Stocks** – Standard & Poor's SmallCap 600

**Foreign Stocks** – MSCI EAFE Index

**Emerging Market Stocks** – MSCI Emerging Markets

**US Corp Bonds** – iBoxx \$ Liquid Investment Grade Index

**US Gov't Bonds** - ICE U.S. 3-7 Year Treasury Bond Index

**US Real Estate** – Dow Jones U.S. Real Estate Index

**Natural Resources** – S&P North American Natural Resources Sector Index

Source: iShares. This material has been obtained from sources generally considered reliable. No guarantee can be made as to its accuracy. Not intended to represent the performance of any particular investment. Indices are unmanaged and one cannot invest directly in an index. Past performance is not a guarantee of future results. Returns in excess of 1 year are annualized.

Data as-of 02/28/2018

