



**TOTAL
WEALTH
PLANNING**

US Stocks

Third quarter 2023 index returns

Period Returns (%)

| Asset Class | QTR | YTD | 1 Year | Annualized | | |
|--------------|-------|-------|--------|------------|---------|----------|
| | | | | 3 Years | 5 Years | 10 Years |
| Small Value | -2.96 | -0.53 | 7.84 | 13.32 | 2.59 | 6.19 |
| Large Growth | -3.13 | 24.98 | 27.72 | 7.97 | 12.42 | 14.48 |
| Large Cap | -3.15 | 13.01 | 21.19 | 9.53 | 9.63 | 11.63 |
| Large Value | -3.16 | 1.79 | 14.44 | 11.05 | 6.23 | 8.45 |
| Marketwide | -3.25 | 12.39 | 20.46 | 9.38 | 9.14 | 11.28 |
| Small Cap | -5.13 | 2.54 | 8.93 | 7.16 | 2.40 | 6.65 |
| Small Growth | -7.32 | 5.24 | 9.59 | 1.09 | 1.55 | 6.72 |

Past performance is not a guarantee of future results. Indices are not available for direct investment. Index performance does not reflect the expenses associated with the management of an actual portfolio. Market segment (index representation) as follows: Marketwide (Russell 3000 Index), Large Cap (Russell 1000 Index), Large Value (Russell 1000 Value Index), Large Growth (Russell 1000 Growth Index), Small Cap (Russell 2000 Index), Small Value (Russell 2000 Value Index), and Small Growth (Russell 2000 Growth Index). World Market Cap represented by Russell 3000 Index, MSCI World ex USA IMI Index, and MSCI Emerging Markets IMI Index. Russell 3000 Index is used as the proxy for the US market. Dow Jones US Select REIT Index used as proxy for the US REIT market. MSCI data © MSCI 2023, all rights reserved. Frank Russell Company is the source and owner of the trademarks, service marks, and copyrights related to the Russell Indexes.