

DIVVI MARKET DASHBOARD



Stock Returns (%): U.S., Foreign, & Global ¹					P/E Ratio	
Index	1-month	YTD	1-year	3-year	TTM	FWD
S&P 500	9.1	20.8	13.8	9.8	22.6	18.8
DJIA	9.2	10.7	6.2	8.9	21.6	16.6
NASDAQ 100	10.8	47.0	33.7	10.0	29.7	23.7
Global	9.2	16.6	12.0	5.7	17.9	15.8
Foreign Developed	9.4	11.8	11.3	4.1	13.4	12.7
Emerging Markets	8.0	5.7	4.2	(4.0)	12.6	11.5

U.S. Sector Returns (%) ¹					P/E Ratio	
Sector	1-month	YTD	1-year	3-year	TTM	FWD
Info Tech	12.8	50.5	38.0	15.4	33.1	26.1
Comms Services	7.8	47.1	35.6	3.6	22.6	16.4
Cons Disc	11.0	31.7	17.6	3.0	25.0	22.1
Media	2.7	13.5	6.7	(6.2)	12.4	10.1
Industrials	9.0	11.9	8.1	9.2	19.9	17.6
Materials	8.7	7.4	1.5	8.1	18.9	17.0
Financials	10.8	5.3	(0.3)	10.7	13.8	13.1
Energy	(1.4)	(0.6)	(4.0)	38.3	9.4	10.2
Cons Staples	4.1	(1.6)	(4.6)	5.6	22.6	18.6
Health Care	5.4	(2.6)	(4.6)	7.0	27.0	16.5
Utilities	5.1	(9.6)	(10.2)	2.9	18.0	15.3

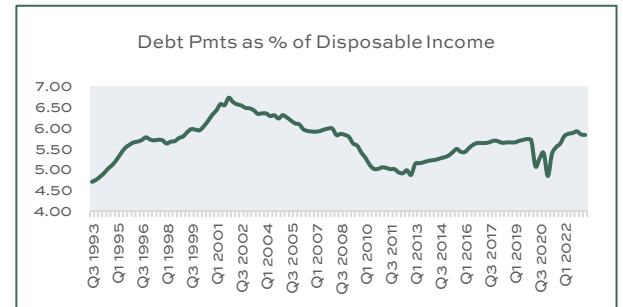
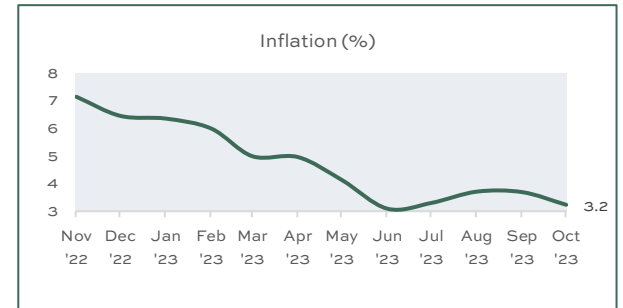
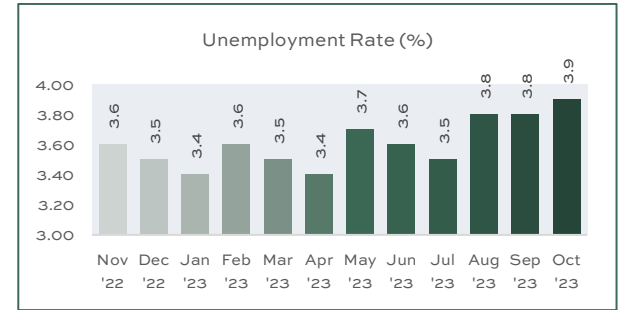
Factor Returns (%) ¹					P/E Ratio	
Index	1-month	YTD	1-year	3-year	TTM	FWD
Quality	8.6	25.1	18.1	9.6	25.1	20.2
Size	9.8	9.7	4.0	6.5	0.1	0.0
Buybacks	7.3	9.4	4.0	12.1	0.0	0.0
EAFE Low Vol	6.1	7.7	9.3	0.2	15.8	14.3
U.S. Low Vol	5.9	6.9	2.9	6.3	21.4	17.3
Value	8.2	6.3	(0.2)	6.7	11.5	10.0
Momentum	9.2	4.2	0.2	0.1	22.9	18.7
High Dividend	6.3	0.9	(2.6)	9.5	15.2	12.8

Fixed Income Returns (%) ¹					
Index	1-month	YTD	1-year	3-year	5-year
High Yield	4.5	9.4	8.6	1.4	4.0
Corporate Bond	6.0	4.0	3.6	(4.5)	2.1
Aggregate Bond	4.5	1.6	1.2	(4.5)	0.7
TIPS	2.7	1.2	0.1	(1.5)	2.7
US Treasury	3.5	0.7	0.1	(4.9)	0.3

Size & Style (%) ^{1,2} : YTD				Size & Style (%) ^{1,2} : 1-Year				Size & Style (%) ^{1,2} : 10-Year (Annlzd)			
	VAL	COR	GR		VAL	COR	GR		VAL	COR	GR
LG	6.1	24.8	41.0	LG	2.4	17.3	29.7	LG	8.3	12.5	15.9
MD	4.6	8.8	17.0	MD	-0.7	2.9	10.0	MD	7.7	8.9	10.1
SM	2.0	4.2	6.0	SM	-4.7	-2.6	-0.8	SM	5.7	6.1	6.2

Interest Rates, Yield Curve, & Credit Spreads (%)			
As of Nov 30, 2023	Current	1m Ago	1yr Ago
Interest Rates			
3-mo T-Bill	5.45	5.59	4.37
10-yr T-Note	4.37	4.88	3.68
30-yr T-Bond	4.54	5.04	3.80
30-yr Fixed Mortgage	7.22	7.79	6.58
Fed Funds Target	5.50	5.50	4.00
BBB Corp YTW	5.95	6.68	5.75
Corp High Yield YTW	8.50	9.48	8.60
Yield Curve			
10yr - 2yr US Treasury	(0.36)	(0.19)	(0.70)
10yr - 3mo US Treasury	(1.08)	(0.71)	(0.69)
5yr - 3mo US Treasury	(1.14)	(0.77)	(0.55)
Credit Spreads			
Corporate Bond OAS	1.11	1.32	1.42
High Yield OAS	3.84	4.42	4.55

U.S. Dollar & Commodities			
Commodities	Level	YTD %	1-year %
Gold	\$2,035.50/oz	11.9%	15.62%
Copper (1m lag)	\$7941.4/ton	-5.1%	3.79%
Oil (WTI)	\$74.46/bl	-7.1%	-7.5%
Nat Gas	\$2.98/mBTU	-46.1%	-47.3%
Gasoline	\$3.24/gal	4.8%	4.8%
Currencies			
	Level	YTD %	1-year %
USD/EUR	1.09	2.0%	5.7%
JPY/USD	147.87	12.2%	6.1%
USD/GBP	1.26	4.7%	5.7%
CAD/USD	1.36	0.4%	0.4%
CNY/USD	7.14	3.5%	0.7%
MXN/USD	17.38	-10.9%	-10.3%



Kansas City Metro	
Data point	Value
Home Price Change, YoY, as of Jun 2023	6.7%
Home Price Change, QoQ, as of Jun 2023	4.3%
Nat'l Home Price Change, YoY, as of Sep 2023	4.8%
Nat'l Home Price Change, QoQ, as of Sep 2023	1.9%
Unemployment Rate, current, as of Sep 2023	2.7%
Unemployment Rate, 1 year ago, as of Sep 2023	2.6%
Housing inventory, active listings, MoM, as of Sep 2023	5.4%
Housing inventory, active listings, YoY, as of Sep 2023	-10.3%

¹Source: Morningstar Direct, ©Morningstar 2023. Year-to-date (YTD) and 1-year returns are cumulative. 3-year and 5-year returns are annualized. All returns are total returns. DJIA is the Dow Jones Industrial Average. Global is represented by the MSCI ACWI. Foreign Developed is represented by MSCI World ex USA. Emerging Markets are represented by MSCI Emerging Markets. U.S. Sector Returns are represented by S&P 1500 sectors, which covers approximately 90% of the U.S. market capitalization. Quality is represented by MSCI USA Sector Neutral Quality Index. Value is represented by MSCI USA Enhanced Value Index. Momentum is represented by MSCI USA Momentum SR Variant Index. Size is represented by MSCI USA Low Size Index. U.S. Low Vol is represented by MSCI USA Minimum Volatility Index. EAFE Low Vol is represented by MSCI EAFE Minimum Vol Index. High Dividend is represented by FTSE High Dividend Yield Index. Buybacks are represented by NASDAQ US Buyback Achievers Index. Price-to-Earnings (P/E) Ratio TTM is based on the trailing 12 months of earnings. Forward P/E Ratio (FWD) is based on analyst estimates for current fiscal year earnings. Aggregate Bond is represented by the Bloomberg U.S. Aggregate Bond Index. US Treasury is represented by Bloomberg US Treasury Index. TIPS are represented by Bloomberg US Treasury US TIPS Index. Corporate Bond represented by Bloomberg US Corporate Bond Index. High Yield represented by ICE BofA US High Yield Index.

²Size & Style box returns are represented by Russell indices. Large Growth (LG GR) represented by Russell Top 200 Growth. Large Core (LG COR) represented by Russell Top 200. Large Value (LG VAL) represented by Russell Top 200 Value. Mid Growth (MD GR) represented by Russell Midcap Growth. Mid Core (MD COR) represented by Russell Midcap. Mid Value (MD VAL). Small Growth (SM GR) represented by Russell 2000 Growth. Small Core (SM COR) represented by Russell 2000. Small Value (SM VAL) represented by Russell 2000 Value.

Inflation (%): Consumer Price Index for All Urban Consumers: All Items in U.S. City Average. Source is U.S. Bureau of Labor Statistics, retrieved from FRED. Unemployment Rate (%) source is U.S. Bureau of Labor Statistics, retrieved from FRED. Consumer Sentiment: University of Michigan, Consumer Sentiment Survey, retrieved from FRED. Home Price data for Kansas City Metro: All-Transactions House Price Index for Kansas City, MO-KS (MSA). Source is U.S. Federal Housing Finance Agency, retrieved from FRED. Unemployment rate for Kansas City Metro: Unemployment Rate in Kansas City, MO-KS (MSA). Source is U.S. Bureau of Labor Statistics, retrieved from FRED. Housing inventory for Kansas City Metro: Housing Inventory: Active Listing Count in Kansas City, MO-KS (CBSA). Source is Realtor.com, retrieved from FRED. All interest rate, yield curve, and credit spread data sourced from the Federal Reserve Bank of St. Louis (FRED). Fed Funds Target is the Upper target. The Lower target would be 25 basis points lower. Gold returns represented by SPDR Gold Shares GLD.

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