

## Eye on the Indices

As of 3/31/2021

	Return						
	QTD	YTD	1 Year	3 Years	5 Years	10 Years	20 Years
<b>Total Market</b>							
NASDAQ Composite TR USD	3.0	3.0	73.4	24.5	23.4	18.2	—
Russell 3000 TR USD	6.3	6.3	62.5	17.1	16.6	13.8	8.9
Wilshire 5000 Total Mkt TR USD	6.5	6.5	62.2	17.2	16.7	13.8	9.1
<b>Large Cap</b>							
DJ Industrial Average TR USD	8.3	8.3	53.8	13.6	16.0	13.1	8.8
Russell 1000 TR USD	5.9	5.9	60.6	17.3	16.7	14.0	8.8
S&P 500 TR USD	6.2	6.2	56.4	16.8	16.3	13.9	8.5
<b>Large Cap Growth</b>							
Russell 1000 Growth TR USD	0.9	0.9	62.7	22.8	21.0	16.6	9.6
S&P 500 Growth TR USD	2.1	2.1	59.4	20.6	19.3	16.2	9.6
<b>Large Cap Value</b>							
Russell 1000 Value TR USD	11.3	11.3	56.1	11.0	11.7	11.0	7.7
S&P 500 Value TR USD	10.8	10.8	50.4	11.8	12.3	11.1	7.0
<b>Small Cap</b>							
Russell 2000 TR USD	12.7	12.7	94.8	14.8	16.4	11.7	9.8
S&P SmallCap 600 TR USD	18.2	18.2	95.3	13.7	15.6	13.0	11.1
<b>Small Cap Growth</b>							
Russell 2000 Growth TR USD	4.9	4.9	90.2	17.2	18.6	13.0	9.7
S&P SmallCap 600 Growth TR USD	12.3	12.3	86.8	15.1	16.9	13.7	11.6
<b>Small Cap Value</b>							
Russell 2000 Value TR USD	21.2	21.2	97.1	11.6	13.6	10.1	9.5
S&P SmallCap 600 Value TR USD	24.2	24.2	103.3	12.0	14.0	12.1	10.4
<b>International Equity Indices</b>							
MSCI EAFE NR USD	3.5	3.5	44.6	6.0	8.8	5.5	5.5
MSCI EM NR USD	2.3	2.3	58.4	6.5	12.1	3.7	10.0
MSCI World ex USA NR USD	4.0	4.0	45.9	6.3	8.9	5.2	5.6
MSCI World Ex USA Small Cap NR USD	4.9	4.9	65.2	6.9	10.6	7.1	9.1
<b>Alternative Indices</b>							
Bloomberg Commodity TR USD	6.9	6.9	35.0	-0.2	2.3	-6.3	0.2
DJ US Select REIT TR USD	10.0	10.0	36.7	7.6	3.9	7.9	9.6
S&P GSCI TR USD	13.5	13.5	50.2	-4.9	1.2	-8.6	-2.5
<b>Fixed Income Indices</b>							
BBgBarc Municipal 3 Yr 2-4 TR USD	0.1	0.1	3.5	2.8	1.9	1.8	2.8
BBgBarc Municipal 7 Yr 6-8 TR USD	-0.5	-0.5	5.6	4.7	3.0	3.9	4.4
BBgBarc US Agency TR USD	-1.6	-1.6	-0.3	3.8	2.5	2.4	3.8
BBgBarc US Agg Bond TR USD	-3.4	-3.4	0.7	4.7	3.1	3.4	4.5
BBgBarc US Govt/Credit Interm TR USD	-1.9	-1.9	2.0	4.4	2.8	2.9	4.0
BBgBarc US Govt/Credit TR USD	-4.3	-4.3	0.9	5.0	3.4	3.7	4.6
BBgBarc US Treasury US TIPS TR USD	-1.5	-1.5	7.5	5.7	3.9	3.4	5.1
FTSE WGBI 1-3 Yr Hdg USD	0.0	0.0	0.6	2.5	1.8	1.5	2.4

The performance data quoted represents past performance. Past performance does not guarantee future results. Please review the additional disclosures included on the last page of this report.

## Eye on the Indices

As of 3/31/2021

	Return									
	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011
<b>Total Market</b>										
NASDAQ Composite TR USD	44.9	36.7	-2.8	29.6	8.9	7.0	14.7	40.1	17.5	-0.8
Russell 3000 TR USD	20.9	31.0	-5.2	21.1	12.7	0.5	12.6	33.6	16.4	1.0
Wilshire 5000 Total Mkt TR USD	20.8	31.0	-5.3	21.0	13.4	0.7	12.7	33.1	16.1	1.0
<b>Large Cap</b>										
DJ Industrial Average TR USD	9.7	25.3	-3.5	28.1	16.5	0.2	10.0	29.7	10.2	8.4
Russell 1000 TR USD	21.0	31.4	-4.8	21.7	12.1	0.9	13.2	33.1	16.4	1.5
S&P 500 TR USD	18.4	31.5	-4.4	21.8	12.0	1.4	13.7	32.4	16.0	2.1
<b>Large Cap Growth</b>										
Russell 1000 Growth TR USD	38.5	36.4	-1.5	30.2	7.1	5.7	13.0	33.5	15.3	2.6
S&P 500 Growth TR USD	33.5	31.1	0.0	27.4	6.9	5.5	14.9	32.8	14.6	4.7
<b>Large Cap Value</b>										
Russell 1000 Value TR USD	2.8	26.5	-8.3	13.7	17.3	-3.8	13.5	32.5	17.5	0.4
S&P 500 Value TR USD	1.4	31.9	-9.0	15.4	17.4	-3.1	12.4	32.0	17.7	-0.5
<b>Small Cap</b>										
Russell 2000 TR USD	20.0	25.5	-11.0	14.6	21.3	-4.4	4.9	38.8	16.3	-4.2
S&P SmallCap 600 TR USD	11.3	22.8	-8.5	13.2	26.6	-2.0	5.8	41.3	16.3	1.0
<b>Small Cap Growth</b>										
Russell 2000 Growth TR USD	34.6	28.5	-9.3	22.2	11.3	-1.4	5.6	43.3	14.6	-2.9
S&P SmallCap 600 Growth TR USD	19.6	21.1	-4.1	14.8	22.2	2.8	3.9	42.7	14.6	3.6
<b>Small Cap Value</b>										
Russell 2000 Value TR USD	4.6	22.4	-12.9	7.8	31.7	-7.5	4.2	34.5	18.1	-5.5
S&P SmallCap 600 Value TR USD	2.5	24.5	-12.6	11.5	31.3	-6.7	7.5	40.0	18.2	-1.4
<b>International Equity Indices</b>										
MSCI EAFE NR USD	7.8	22.0	-13.8	25.0	1.0	-0.8	-4.9	22.8	17.3	-12.1
MSCI EM NR USD	18.3	18.4	-14.6	37.3	11.2	-14.9	-2.2	-2.6	18.2	-18.4
MSCI World ex USA NR USD	7.6	22.5	-14.1	24.2	2.7	-3.0	-4.3	21.0	16.4	-12.2
MSCI World Ex USA Small Cap NR USD	12.8	25.4	-18.1	31.0	4.3	5.5	-5.3	25.6	17.5	-15.8
<b>Alternative Indices</b>										
Bloomberg Commodity TR USD	-3.1	7.7	-11.2	1.7	11.8	-24.7	-17.0	-9.5	-1.1	-13.3
DJ US Select REIT TR USD	-11.2	23.1	-4.2	3.8	6.7	4.5	32.0	1.2	17.1	9.4
S&P GSCI TR USD	-23.7	17.6	-13.8	5.8	11.4	-32.9	-33.1	-1.2	0.1	-1.2
<b>Fixed Income Indices</b>										
BBgBarc Municipal 3 Yr 2-4 TR USD	3.0	3.7	1.8	1.6	0.1	1.2	1.2	1.3	1.9	3.5
BBgBarc Municipal 7 Yr 6-8 TR USD	5.1	6.7	1.7	4.5	-0.5	3.3	6.1	-1.0	4.2	10.1
BBgBarc US Agency TR USD	5.5	5.9	1.3	2.1	1.4	1.0	3.6	-1.4	2.2	4.8
BBgBarc US Agg Bond TR USD	7.5	8.7	0.0	3.5	2.6	0.5	6.0	-2.0	4.2	7.8
BBgBarc US Govt/Credit Interm TR USD	6.4	6.8	0.9	2.1	2.1	1.1	3.1	-0.9	3.9	5.8
BBgBarc US Govt/Credit TR USD	8.9	9.7	-0.4	4.0	3.0	0.1	6.0	-2.4	4.8	8.7
BBgBarc US Treasury US TIPS TR USD	11.0	8.4	-1.3	3.0	4.7	-1.4	3.6	-8.6	7.0	13.6
FTSE WGBI 1-3 Yr Hdg USD	2.3	3.3	2.1	0.9	1.2	0.7	1.0	0.8	1.4	1.4

The performance data quoted represents past performance. Past performance does not guarantee future results. Please review the additional disclosures included on the last page of this report.

## Eye on the Indices

As of 3/31/2021

The performance data quoted represents past performance. Past performance does not guarantee future results. Current performance may be lower or higher than the performance information quoted.

Returns are shown in percent and those of one year or longer have been annualized.

Returns listed assume reinvestment of all dividend and capital gain distributions; they do not reflect the deduction of any fees charged by an independent investment advisor or other service provider to an individual account. Such fee, if taken into consideration, will reduce the performance quoted above.

Investors cannot invest directly in an index. Indexes are unmanaged and reflect reinvested dividends and/or distributions, but do not reflect sales charges, commissions, expenses or taxes.

Index used for comparison is deemed the best available and may differ from prospectus index. Some indexes are not available for full period of the fund.

This information is being provided as a convenience and is not an offer to sell. Information from sources deemed reliable, but its accuracy cannot be guaranteed. The Fund and Index providers listed in this report are unaffiliated with Buckingham Strategic Partners. Please contact your financial advisor if you have any questions about your investments. Source: Morningstar Direct

© 2020 Buckingham Wealth Partners, LLC. Buckingham Strategic Wealth, LLC and Buckingham Strategic Partners, LLC (collectively, Buckingham Wealth Partners). IRN-20-1142