

Benchmark Returns

Benchmark	Returns as of 06/30/2018		Month End YTD as of 06/30/2018	Average Annual Total Returns as of 06/30/2018			
	1 Month	3 Month		1 Year	3 Year	5 Year	10 Year
Balanced Composite Index	0.37%	2.31%	1.45%	8.68%	7.81%	8.99%	8.09%
BloomBarc 1 Year Municipal Index	0.35%	0.59%	0.97%	0.94%	0.86%	0.78%	1.36%
BloomBarc 1-15 Year Municipal Index	0.18%	0.85%	-0.07%	1.01%	2.29%	2.85%	3.89%
BloomBarc 1-5 Year Municipal Index	0.34%	0.71%	0.66%	0.54%	1.20%	1.42%	2.47%
BloomBarc CA Municipal Index	0.03%	0.97%	-0.11%	1.80%	2.85%	3.93%	4.73%
BloomBarc GA ex-USD FIAdjRIC Cp Hgd	0.48%	0.43%	1.41%	3.31%	3.67%	4.13%	—
BloomBarc MA Municipal Index	0.06%	0.72%	-0.48%	1.06%	2.54%	3.35%	4.28%
BloomBarc Municipal Bond Index	0.09%	0.87%	-0.25%	1.56%	2.85%	3.53%	4.43%
BloomBarc Municipal CA Intermed Idx	0.17%	1.05%	-0.03%	0.59%	2.13%	2.99%	4.38%
BloomBarc NJ Municipal Index	0.27%	1.21%	0.17%	4.22%	4.28%	4.00%	4.67%
BloomBarc NY Municipal Index	0.06%	0.77%	-0.44%	1.09%	2.67%	3.53%	4.28%
BloomBarc OH Municipal Index	0.06%	0.74%	-0.35%	1.16%	2.85%	3.79%	4.28%
BloomBarc PA Municipal Index	0.12%	0.96%	-0.27%	1.68%	3.11%	3.77%	4.61%
BloomBarc US 0-5 Year TIPS Index	0.16%	0.48%	0.70%	1.39%	1.12%	0.72%	—
BloomBarc US 1-5 Year Credit Index	-0.05%	0.26%	-0.44%	0.12%	1.49%	1.83%	3.32%
BloomBarc US 1-5 Year Treasury Idx	-0.01%	0.12%	-0.28%	-0.40%	0.48%	0.77%	1.79%
BloomBarc US 1-5 Yr Corporate Index	-0.09%	0.29%	-0.51%	0.15%	1.70%	2.03%	3.60%
BloomBarc US 1-5 Yr Government Idx	-0.01%	0.12%	-0.27%	-0.38%	0.49%	0.79%	1.82%

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BloomBarc US 10+ Year Corp Index	-1.40%	-2.83%	-6.77%	-1.75%	5.10%	5.47%	7.40%
BloomBarc US 5-10 Year Corp Index	-0.35%	-0.59%	-2.95%	-1.13%	2.81%	3.60%	5.81%
BloomBarc US 5-10 Year Credit Index	-0.29%	-0.59%	-2.87%	-1.07%	2.62%	3.48%	5.68%
BloomBarc US 5-10 Yr Treasury Index	-0.02%	-0.08%	-1.59%	-1.55%	0.98%	1.72%	3.78%
BloomBarc US Agg Float Adj Index	-0.14%	-0.20%	-1.67%	-0.45%	1.74%	2.26%	—
BloomBarc US GNMA Index	0.08%	0.42%	-0.86%	0.10%	1.27%	2.08%	3.56%
BloomBarc US Long Treasury Index	0.18%	0.31%	-3.00%	-0.13%	3.40%	4.55%	6.05%



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BloomBarc US LongCredit A/Better Ix	-1.10%	-2.33%	-6.42%	-1.49%	4.89%	5.48%	6.93%
BloomBarc US MBS Float Adj Index	0.05%	0.24%	-0.92%	0.15%	1.38%	2.17%	—
BloomBarc US Treas Bellwether:1Yr	0.12%	0.41%	0.79%	1.13%	0.77%	0.58%	0.83%
BloomBarc US Trsy Inflat Prtcd Idx	0.40%	0.77%	-0.02%	2.11%	1.93%	1.68%	3.03%
BloomBarc USD EmergMkt GovRIC Caplx	-0.76%	-2.61%	-4.12%	-1.35%	4.32%	4.54%	—
CA Tax-Exempt Money Mkt Funds Avg	—	—	—	—	—	—	—
Communication Services Spliced Idx	3.78%	2.25%	-5.19%	-4.27%	3.12%	5.22%	5.85%
Conservative Growth Composite Index	-0.12%	0.55%	-0.12%	5.21%	5.26%	6.16%	5.78%
Consumer Discretionary Spliced Idx	3.01%	7.35%	9.48%	21.09%	12.82%	14.94%	15.93%
Convertibles Composite Index	0.18%	2.87%	4.84%	9.73%	6.62%	8.85%	7.61%
CRSP US Total Market Index	0.69%	3.91%	3.29%	14.83%	11.60%	13.28%	—

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Dividend Growth Spliced Index	0.28%	1.10%	0.63%	11.87%	11.34%	11.34%	8.84%
FTSE All-World ex US Index	-1.93%	-2.67%	-3.83%	7.28%	5.28%	6.35%	2.97%
FTSE AW ex US High Div Yield Idx	-1.29%	-3.49%	-4.83%	4.21%	3.93%	5.10%	2.76%
FTSE Emerging Index	-3.91%	-8.22%	-6.90%	7.32%	4.26%	4.75%	2.29%
FTSE Global All Cap Index Hdg.	0.04%	3.14%	1.45%	11.97%	9.18%	11.27%	7.74%
FTSE Global Small-Cap ex US Index	-2.77%	-1.80%	-2.52%	10.16%	7.08%	8.12%	4.75%
FTSE High Dividend Yield Index	-0.33%	1.38%	-1.48%	9.50%	10.67%	11.43%	10.31%
Global Wellesley Income Comp Index	-0.20%	-0.26%	-2.01%	—	—	—	—
Global Wellington Composite Index	-0.17%	0.93%	-0.13%	—	—	—	—
Growth Composite Index	-0.30%	1.07%	0.38%	9.78%	8.02%	9.44%	7.48%
High-Yield Corporate Composite Idx	0.25%	0.59%	-0.48%	1.69%	4.57%	4.98%	7.18%
iMoneyNet MFR Treasury Funds Avg	—	—	—	—	—	—	—
Income Composite Index	-0.04%	0.28%	-0.42%	2.94%	3.81%	4.47%	4.90%
Information Technology Spliced Idx	-0.56%	6.35%	10.74%	30.20%	21.36%	21.32%	14.50%
JP Morgan EMBI Global Diversified	-1.19%	-3.54%	-5.23%	-1.60%	4.63%	5.15%	6.75%
Managed Payout Composite Index	-0.39%	0.82%	0.14%	7.77%	6.27%	6.96%	5.08%
Moderate Growth Composite Index	-0.21%	0.82%	0.14%	7.49%	6.66%	7.82%	6.81%
Money Market Funds Average	—	—	—	—	—	—	—



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			as of 06/30/2018	Returns as of 06/30/2018			
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MSCI US Broad Market Index	0.69%	3.94%	3.30%	14.84%	11.62%	13.36%	10.37%
MSCI US Prime Market 750 Index	0.66%	3.53%	2.90%	14.57%	11.75%	13.48%	10.25%
MSCI US Small Cap 1750 Index	0.89%	7.30%	6.58%	16.83%	10.73%	12.47%	11.27%
NASDAQ Intl Dividend Achievers Sel Ix	-0.57%	2.39%	-1.02%	7.99%	—	—	—
NASDAQ US Dividend Achievers Select	0.28%	1.10%	0.63%	11.87%	11.34%	11.34%	9.81%
NY Tax-Exempt Money Mkt Funds Avg	—	—	—	—	—	—	—
Real Estate Spliced Index	4.15%	8.90%	0.13%	2.48%	7.68%	8.03%	8.01%
Russell 1000 Growth Index	0.96%	5.76%	7.25%	22.51%	14.98%	16.36%	11.83%
Russell 1000 Index	0.65%	3.57%	2.85%	14.54%	11.64%	13.37%	10.20%
Russell 1000 Value Index	0.25%	1.18%	-1.69%	6.77%	8.26%	10.34%	8.49%
Russell 2000 Growth Index	0.78%	7.23%	9.70%	21.86%	10.60%	13.65%	11.24%
Russell 2000 Index	—	—	—	—	—	—	—
Russell 2000 Value Index	0.61%	8.30%	5.44%	13.10%	11.22%	11.18%	9.88%
Russell 2500 Growth Index	0.84%	5.53%	8.04%	21.53%	10.86%	13.87%	11.38%
Russell 2500 Value Index	0.53%	5.80%	3.00%	11.49%	9.76%	10.78%	10.10%
Russell 3000 Growth Index	0.95%	5.87%	7.44%	22.47%	14.63%	16.14%	11.78%
Russell 3000 Index	0.65%	3.89%	3.22%	14.78%	11.58%	13.29%	10.23%
Russell 3000 Value Index	0.28%	1.71%	-1.16%	7.25%	8.48%	10.40%	8.60%

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Russell Midcap Growth Index	0.39%	3.16%	5.40%	18.52%	10.73%	13.37%	10.45%
Russell Midcap Value Index	0.81%	2.41%	-0.16%	7.60%	8.80%	11.27%	10.06%
S&P 500 Growth Index	0.60%	5.25%	7.28%	20.63%	14.48%	15.99%	11.70%
S&P 500 Index	0.62%	3.43%	2.65%	14.37%	11.93%	13.42%	10.17%
S&P 500 Value Index	0.63%	1.40%	-2.22%	7.58%	8.82%	10.45%	8.44%
S&P Completion Index	0.87%	5.94%	6.07%	16.72%	10.23%	12.53%	10.66%
S&P EPAC SmallCap Index	-2.22%	-1.84%	-2.14%	11.27%	9.23%	11.05%	6.11%
S&P Global ex U.S. Property Index	-2.70%	-2.77%	-3.06%	8.17%	5.48%	5.48%	—
S&P MidCap 400 Growth Index	0.43%	3.31%	4.71%	15.69%	11.33%	13.14%	10.98%
S&P MidCap 400 Index	0.42%	4.29%	3.49%	13.50%	10.89%	12.69%	10.78%



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S&P MidCap 400 Value Index	0.42%	5.35%	2.18%	11.17%	10.08%	11.96%	10.44%
S&P National AMT-Free Muni Bond Idx	0.08%	0.82%	-0.35%	1.51%	2.80%	3.32%	4.21%
S&P SmallCap 600 Growth Index	1.38%	8.97%	11.60%	22.50%	14.37%	15.54%	12.66%
S&P SmallCap 600 Index	1.13%	8.77%	9.39%	20.50%	13.84%	14.60%	12.25%
S&P SmallCap 600 Value Index	0.89%	8.58%	7.14%	18.46%	13.26%	13.58%	11.77%
Spl BloomBarc US 5-10Yr G/Cr FltAdj	-0.15%	-0.32%	-2.19%	-1.30%	1.78%	2.58%	4.68%
Spl BloomBarc US Long Treasury Idx	0.18%	0.31%	-3.00%	-0.13%	3.40%	4.56%	—
Spl BloomBarc US Treas 1-3 Yr Idx	0.01%	0.21%	0.05%	0.02%	0.42%	0.59%	—

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Spl BloomBarc US Treas 3-10 Yr Idx	-0.03%	-0.04%	-1.18%	-1.27%	0.81%	1.45%	—
Spl BloomBarc US1-5YrGov/Cr FIAdjlx	-0.02%	0.17%	-0.33%	-0.20%	0.84%	1.13%	2.24%
Spl BloomBarc USLongGv/Cr FltAdj lx	-0.62%	-1.45%	-4.98%	-0.78%	4.34%	5.10%	6.79%
Spl Total International Stock Index	-2.03%	-2.58%	-3.69%	7.58%	5.47%	6.54%	2.77%
Spliced BloomBarc USAgg Flt Adjlx	-0.14%	-0.20%	-1.67%	-0.45%	1.74%	2.26%	3.74%
Spliced Developed ex US Index	-1.47%	-1.08%	-2.84%	7.74%	5.75%	7.01%	3.12%
Spliced Emerging Markets Index	-4.43%	-8.36%	-7.17%	6.53%	3.49%	4.28%	1.90%
Spliced Energy Index	0.65%	10.25%	6.07%	23.98%	5.20%	2.06%	-1.37%
Spliced Equity Income Index	-0.33%	1.38%	-1.48%	9.50%	10.67%	11.43%	10.31%
Spliced European Stock Index	-0.69%	-1.00%	-2.79%	6.29%	4.88%	6.77%	2.66%
Spliced Extended Market Index	0.87%	5.94%	6.07%	16.72%	10.23%	12.53%	10.66%
Spliced Glbl Custom Metals & Mining	-1.47%	1.54%	-3.90%	16.12%	11.09%	3.69%	-3.63%
Spliced Global Equity Index	-0.54%	0.53%	-0.43%	10.73%	8.19%	9.41%	5.80%
Spliced Growth Index	1.20%	5.90%	7.17%	19.37%	13.35%	15.40%	11.24%
Spliced Health Care Index	1.18%	2.51%	1.50%	5.29%	3.24%	10.60%	10.72%
Spliced Inst Total Stock Market Idx	0.69%	3.91%	3.29%	14.83%	11.60%	13.28%	10.34%
Spliced International Index	-1.88%	-2.61%	-3.77%	7.28%	5.07%	5.99%	2.02%
Spliced Large Cap Index	0.66%	3.44%	2.74%	14.45%	11.77%	13.40%	10.21%

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Spliced Market Neutral Index USD	—	—	—	—	—	—	—



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Spliced Mega Cap Growth Index	1.29%	6.41%	7.65%	20.58%	14.45%	16.18%	11.70%
Spliced Mega Cap Index	0.61%	3.61%	2.77%	14.91%	12.28%	13.60%	10.23%
Spliced Mega Cap Value Index	-0.01%	1.21%	-1.36%	10.09%	10.39%	11.52%	8.91%
Spliced Mid Cap Growth Idx	0.96%	3.92%	5.63%	15.16%	9.10%	12.43%	9.07%
Spliced Mid Cap Index	0.93%	2.58%	2.60%	12.12%	9.25%	12.35%	10.14%
Spliced Mid Cap Value Index	0.94%	1.39%	0.01%	9.51%	9.40%	12.25%	11.04%
Spliced NJ Tax-Ex Money Mkt Fds Avg	—	—	—	—	—	—	—
Spliced PA Tax-Ex Money Mkt Fds Avg	—	—	—	—	—	—	—
Spliced Pacific Stock Index	-2.94%	-2.52%	-2.97%	9.86%	7.24%	7.43%	4.11%
Spliced Small and Mid Cap Index	0.79%	4.78%	4.81%	15.65%	10.49%	12.94%	10.87%
Spliced Small Cap Growth Index	1.19%	7.34%	9.59%	21.42%	10.54%	12.31%	11.00%
Spliced Small Cap Index	0.73%	6.20%	5.97%	16.47%	10.43%	12.39%	11.20%
Spliced Small Cap Value Index	0.35%	5.26%	3.06%	12.52%	10.34%	12.43%	11.27%
Spliced Social Index	0.50%	4.06%	3.33%	15.65%	12.00%	14.36%	10.96%
Spliced Total Stock Market Index	0.69%	3.91%	3.29%	14.83%	11.60%	13.28%	10.33%
Spliced Total World Stock Index	-0.61%	0.73%	-0.13%	11.34%	8.65%	9.96%	6.30%
Spliced US IMI Consumer Stapl 25/50	4.54%	-0.42%	-6.79%	-2.23%	5.60%	8.57%	10.27%

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Spliced US IMI Energy 25/50	0.69%	14.35%	7.55%	22.37%	2.95%	1.56%	0.24%
Spliced US IMI Financials 25/50	-1.87%	-2.29%	-2.80%	9.98%	13.02%	13.33%	8.11%
Spliced US IMI Health Care 25/50	1.62%	4.28%	3.98%	9.51%	6.08%	14.64%	13.56%
Spliced US IMI Industrials 25/50	-2.50%	-1.99%	-3.77%	7.66%	11.52%	12.87%	9.87%
Spliced US IMI Materials 25/50	-0.28%	2.59%	-2.90%	9.86%	9.41%	11.08%	6.22%
Spliced US IMI Utilities 25/50	2.43%	4.63%	1.12%	4.88%	12.56%	10.90%	7.24%
Spliced Value Index	0.17%	1.26%	-1.06%	10.22%	10.37%	11.69%	9.27%
STAR Composite Index	-0.08%	1.26%	0.43%	7.81%	6.87%	7.93%	6.98%
Target Retirement 2015 Composite Ix	-0.11%	0.63%	0.06%	5.64%	5.33%	6.64%	6.00%
Target Retirement 2020 Composite Ix	-0.18%	0.76%	0.13%	6.97%	6.29%	7.67%	6.59%
Target Retirement 2025 Composite Ix	-0.22%	0.86%	0.18%	7.93%	6.90%	8.35%	6.89%
Target Retirement 2030 Composite Ix	-0.26%	0.96%	0.28%	8.80%	7.41%	8.96%	7.13%
Target Retirement 2035 Composite Ix	-0.29%	1.05%	0.36%	9.65%	7.91%	9.56%	7.46%



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Target Retirement 2040 Composite Ix	-0.33%	1.14%	0.44%	10.51%	8.40%	10.07%	7.78%
Target Retirement 2045 Composite Ix	-0.35%	1.20%	0.49%	10.93%	8.68%	10.24%	7.86%
Target Retirement 2050 Composite Ix	-0.35%	1.20%	0.49%	10.93%	8.68%	10.24%	7.86%
Target Retirement 2055 Composite Ix	-0.35%	1.20%	0.49%	10.93%	8.68%	10.24%	—
Target Retirement 2060 Composite Ix	-0.35%	1.20%	0.49%	10.93%	8.68%	10.24%	—

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Target Retirement 2065 Composite Ix	-0.35%	1.20%	0.49%	10.93%	—	—	—
Target Retirement Income Compos. Ix	-0.06%	0.50%	-0.03%	4.20%	4.33%	4.99%	5.17%
Tax-Exempt Money Mkt Funds Average	—	—	—	—	—	—	—
Tax-Managed Balanced Compos. Index	0.42%	2.25%	1.55%	7.77%	7.11%	8.21%	7.59%
US Gov't Money Market Funds Average	—	—	—	—	—	—	—
Wellesley Income Composite Index	—	—	—	—	—	—	—
Wellington Composite Index	0.26%	2.01%	0.82%	8.95%	8.67%	9.80%	8.43%

Index performance is provided as a benchmark. It is not illustrative of any particular investment. An investment cannot be made in an index.