

## Benchmark Returns

Benchmark	Returns as of 03/31/2021		Month End YTD as of 03/31/2021	Average Annual Total Returns as of 03/31/2021			
	1 Month	3 Month		1 Year	3 Year	5 Year	10 Year
Balanced Composite Index	1.57%	2.40%	2.40%	35.15%	12.81%	11.62%	10.04%
BloomBarc 1 Year Municipal Index	0.07%	0.20%	0.20%	1.91%	1.93%	1.41%	1.13%
BloomBarc 1-15 Year Municipal Index	0.47%	-0.32%	-0.32%	4.92%	4.44%	3.03%	3.72%
BloomBarc 1-5 Year Municipal Index	0.28%	0.00%	0.00%	3.68%	2.99%	2.00%	2.05%
BloomBarc CA Municipal Index	0.69%	-0.67%	-0.67%	4.96%	4.75%	3.37%	4.93%
BloomBarc GA Credit Idx Hedged USD	-0.91%	-3.08%	-3.08%	7.98%	5.60%	4.62%	4.79%
BloomBarc GA ex-USD FIAdjRIC Cp Hgd	0.11%	-2.22%	-2.22%	2.20%	4.18%	3.50%	—
BloomBarc MA Municipal Index	0.67%	-0.65%	-0.65%	4.35%	4.71%	3.21%	4.21%
BloomBarc Municipal Bond Index	0.62%	-0.35%	-0.35%	5.51%	4.91%	3.49%	4.54%
BloomBarc Municipal CA Intermed Idx	0.48%	-0.91%	-0.91%	4.45%	4.33%	2.79%	3.99%
BloomBarc NJ Municipal Index	0.64%	0.50%	0.50%	10.02%	6.14%	4.79%	5.23%
BloomBarc NY Municipal Index	0.63%	-0.39%	-0.39%	5.01%	4.49%	3.19%	4.25%
BloomBarc OH Municipal Index	0.52%	-0.57%	-0.57%	5.14%	4.86%	3.42%	4.55%
BloomBarc PA Municipal Index	0.64%	-0.08%	-0.08%	5.62%	5.41%	3.87%	4.81%
BloomBarc US 0-5 Year TIPS Index	0.43%	1.07%	1.07%	6.92%	3.78%	2.67%	1.69%
BloomBarc US 1-5 Year Credit Index	-0.29%	-0.57%	-0.57%	5.88%	4.31%	3.06%	2.90%
BloomBarc US 1-5 Year Treasury Idx	-0.22%	-0.59%	-0.59%	-0.05%	3.30%	1.91%	1.73%
BloomBarc US 1-5 Yr Corporate Index	-0.32%	-0.59%	-0.59%	7.13%	4.49%	3.25%	3.11%

  

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BloomBarc US 1-5 Yr Government Idx	-0.21%	-0.58%	-0.58%	-0.02%	3.29%	1.92%	1.72%
BloomBarc US 10+ Year Corp Index	-2.88%	-8.51%	-8.51%	9.17%	7.68%	6.88%	7.27%
BloomBarc US 5-10 Year Corp Index	-1.77%	-3.89%	-3.89%	10.19%	6.66%	4.89%	5.29%
BloomBarc US 5-10 Year Credit Index	-1.74%	-3.90%	-3.90%	9.46%	6.49%	4.72%	5.15%
BloomBarc US 5-10 Yr Treasury Index	-1.80%	-4.45%	-4.45%	-4.07%	4.81%	2.41%	3.59%
BloomBarc US Agg Float Adj Index	-1.31%	-3.56%	-3.56%	0.72%	4.69%	3.14%	3.47%
BloomBarc US GNMA Index	-0.24%	-0.98%	-0.98%	-0.36%	3.60%	2.22%	2.75%



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BloomBarc US Long Treasury Index	-4.99%	-13.51%	-13.51%	-15.80%	5.87%	3.13%	6.35%
BloomBarc US LongCredit A/Better Ix	-3.22%	-9.31%	-9.31%	3.49%	7.04%	5.80%	7.09%
BloomBarc US MBS Float Adj Index	-0.49%	-1.06%	-1.06%	-0.06%	3.69%	2.40%	2.78%
BloomBarc US Treas Bellwether:1Yr	0.03%	0.08%	0.08%	0.28%	2.15%	1.60%	0.97%
BloomBarc US Trsy Inflat Prtcd Idx	-0.19%	-1.47%	-1.47%	7.54%	5.68%	3.86%	3.44%
BloomBarc USD EmergMkt GovRIC Caplx	-1.46%	-5.17%	-5.17%	14.26%	4.21%	4.90%	—
Bloomberg Commodity Index TR	-2.15%	6.92%	6.92%	35.04%	-0.20%	2.31%	-6.28%
CA Tax-Exempt Money Mkt Funds Avg	—	—	—	—	—	—	—
Communication Services Spliced Idx	1.24%	8.26%	8.26%	71.64%	17.16%	9.17%	9.60%
Conservative Growth Composite Index	0.55%	0.26%	0.26%	21.71%	8.46%	7.89%	6.72%
Consumer Discretionary Spliced Idx	4.00%	7.34%	7.34%	106.89%	24.91%	20.73%	18.40%

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CRSP US Total Market Index	3.47%	6.43%	6.43%	62.75%	17.14%	16.67%	—
Dividend Growth Spliced Index	5.95%	4.42%	4.42%	44.99%	15.55%	14.89%	12.62%
FTSE All-World ex US Index	1.43%	3.71%	3.71%	50.58%	6.89%	10.05%	5.27%
FTSE All-World Index	2.82%	4.79%	4.79%	55.14%	12.40%	13.61%	9.51%
FTSE AW ex US High Div Yield Idx	3.69%	7.88%	7.88%	48.63%	4.13%	8.03%	4.20%
FTSE Emerging Index	-1.55%	2.79%	2.79%	56.22%	6.73%	11.69%	3.61%
FTSE Global All Cap Index Hdg.	3.54%	6.43%	6.43%	54.05%	13.76%	14.20%	10.83%
FTSE Global Small-Cap ex US Index	1.67%	4.80%	4.80%	66.16%	5.19%	9.17%	5.19%
FTSE High Dividend Yield Index	6.81%	11.03%	11.03%	47.66%	10.57%	11.44%	12.11%
Global Wellesley Income Comp Index	1.40%	1.29%	1.29%	19.90%	6.33%	—	—
Global Wellington Composite Index	1.94%	2.25%	2.25%	36.31%	10.61%	—	—
Growth Composite Index	1.98%	3.71%	3.71%	45.63%	11.83%	12.23%	9.74%
High-Yield Corporate Composite Idx	0.00%	0.30%	0.30%	20.78%	7.08%	7.33%	6.25%
iMoneyNet MFR Treasury Funds Avg	—	—	—	—	—	—	—
Income Composite Index	-0.16%	-1.46%	-1.46%	11.04%	6.57%	5.60%	5.18%
Information Technology Spliced Idx	0.65%	1.45%	1.45%	70.66%	29.58%	28.36%	20.30%
JP Morgan EMBI Global Diversified	-0.96%	-4.54%	-4.54%	16.00%	4.04%	5.05%	5.63%
Managed Allocation Composite Index	1.21%	2.49%	2.49%	35.17%	9.89%	9.99%	7.31%



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Moderate Growth Composite Index	1.27%	1.98%	1.98%	33.22%	10.22%	10.10%	8.36%
MSCI AC World Index ex USA Net	1.26%	3.49%	3.49%	49.41%	6.51%	9.76%	4.93%
MSCI US Broad Market Index	3.58%	6.41%	6.41%	63.13%	17.17%	16.69%	13.85%
MSCI US Prime Market 750 Index	3.72%	5.65%	5.65%	60.16%	17.41%	16.77%	14.06%
MSCI US Small Cap 1750 Index	2.28%	13.81%	13.81%	96.83%	15.23%	15.91%	12.16%
NASDAQ Intl Dividend Achievers Sel Ix	1.59%	1.36%	1.36%	43.84%	10.94%	10.95%	—
NASDAQ US Dividend Achievers Select	5.95%	4.42%	4.42%	44.99%	15.55%	14.89%	12.62%
NY Tax-Exempt Money Mkt Funds Avg	—	—	—	—	—	—	—
Real Estate Spliced Index	5.15%	8.73%	8.73%	36.68%	11.09%	6.23%	9.00%
Russell 1000 Growth Index	1.72%	0.94%	0.94%	62.74%	22.80%	21.05%	16.63%
Russell 1000 Index	3.78%	5.91%	5.91%	60.59%	17.31%	16.66%	13.97%
Russell 1000 Value Index	5.88%	11.26%	11.26%	56.09%	10.96%	11.74%	10.99%
Russell 2000 Growth Index	-3.15%	4.88%	4.88%	90.20%	17.16%	18.61%	13.02%
Russell 2000 Index	—	—	—	—	—	—	—
Russell 2000 Value Index	5.23%	21.17%	21.17%	97.05%	11.57%	13.56%	10.06%
Russell 2500 Growth Index	-3.34%	2.49%	2.49%	87.50%	19.96%	19.91%	14.21%
Russell 2500 Value Index	4.96%	16.83%	16.83%	87.47%	10.88%	12.15%	10.23%
Russell 3000 Index	3.58%	6.35%	6.35%	62.53%	17.12%	16.64%	13.79%

  

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Russell Midcap Growth Index	-1.91%	-0.57%	-0.57%	68.61%	19.41%	18.39%	14.11%
Russell Midcap Value Index	5.16%	13.05%	13.05%	73.76%	10.70%	11.60%	11.05%
S&P 500 Growth Index	2.64%	2.12%	2.12%	59.43%	20.58%	19.35%	16.16%
S&P 500 Index	4.38%	6.17%	6.17%	56.35%	16.78%	16.29%	13.91%
S&P 500 Value Index	6.26%	10.77%	10.77%	50.37%	11.83%	12.31%	11.15%
S&P Completion Index	-0.40%	7.75%	7.75%	97.84%	18.06%	17.89%	13.04%
S&P EPAC SmallCap Index	1.65%	3.66%	3.66%	63.20%	6.02%	10.06%	7.77%
S&P Global ex U.S. Property Index	1.47%	2.46%	2.46%	31.26%	1.28%	4.89%	4.92%
S&P MidCap 400 Growth Index	2.39%	8.56%	8.56%	77.05%	14.19%	15.46%	12.34%



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S&P MidCap 400 Index	4.67%	13.47%	13.47%	83.46%	13.40%	14.37%	11.92%
S&P MidCap 400 Value Index	6.88%	18.43%	18.43%	89.26%	12.06%	12.77%	11.21%
S&P National AMT-Free Muni Bond Idx	0.61%	-0.41%	-0.41%	4.98%	4.69%	3.32%	4.38%
S&P SmallCap 600 Growth Index	1.08%	12.27%	12.27%	86.77%	15.07%	16.87%	13.75%
S&P SmallCap 600 Index	3.33%	18.24%	18.24%	95.33%	13.71%	15.60%	12.97%
S&P SmallCap 600 Value Index	5.43%	24.17%	24.17%	103.29%	11.97%	14.03%	12.07%
Spl BloomBarc US 5-10Yr G/Cr FltAdj	-1.76%	-4.17%	-4.17%	2.27%	5.73%	3.59%	4.39%
Spl BloomBarc US Long Treasury Idx	-4.99%	-13.51%	-13.51%	-15.80%	5.87%	3.17%	6.30%
Spl BloomBarc US Treas 1-3 Yr Idx	-0.03%	-0.05%	-0.05%	0.34%	2.80%	1.73%	1.31%

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Spl BloomBarc US Treas 3-10 Yr Idx	-1.15%	-2.93%	-2.93%	-2.37%	4.48%	2.35%	3.07%
Spl BloomBarc US1-5YrGov/Cr FIAdjlx	-0.24%	-0.57%	-0.57%	1.90%	3.66%	2.33%	2.10%
Spl BloomBarc USLongGv/Cr FltAdj lx	-3.62%	-10.41%	-10.41%	-2.05%	7.14%	5.47%	6.98%
Spl Total International Stock Index	1.46%	3.82%	3.82%	51.97%	6.71%	9.96%	5.24%
Spliced Alternative Strategies Idx	—	—	—	—	—	—	—
Spliced BloomBarc USAgg Flt Adjlx	-1.31%	-3.56%	-3.56%	0.72%	4.69%	3.14%	3.47%
Spliced Developed ex US Index	2.49%	4.06%	4.06%	50.25%	6.70%	9.53%	5.99%
Spliced Emerging Markets Index	-1.40%	3.12%	3.12%	57.10%	6.47%	11.18%	3.33%
Spliced Energy Index	4.49%	9.18%	9.18%	26.86%	-10.23%	-2.23%	-4.43%
Spliced Equity Income Index	6.81%	11.03%	11.03%	47.66%	10.57%	11.44%	12.11%
Spliced European Stock Index	2.90%	4.18%	4.18%	48.13%	6.12%	8.68%	5.49%
Spliced Extended Market Index	-0.40%	7.75%	7.75%	97.84%	18.06%	17.89%	13.04%
Spliced Global Capital Cycles Index	1.62%	4.75%	4.75%	62.96%	8.68%	13.98%	-3.03%
Spliced Global Equity Index	2.67%	4.57%	4.57%	54.60%	12.07%	13.21%	9.14%
Spliced Growth Index	1.65%	1.50%	1.50%	65.02%	23.14%	20.64%	16.34%
Spliced Health Care Index	2.27%	0.44%	0.44%	30.21%	13.28%	11.54%	12.92%
Spliced Inst Total Stock Market Idx	3.47%	6.43%	6.43%	62.75%	17.14%	16.67%	13.81%
Spliced International Index	1.26%	3.49%	3.49%	49.41%	6.51%	9.76%	4.93%

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Spliced Large Cap Index	3.83%	5.66%	5.66%	58.78%	17.40%	16.75%	14.03%
Spliced Market Neutral Index USD	—	—	—	—	—	—	—
Spliced Mega Cap Growth Index	2.29%	1.57%	1.57%	63.79%	23.72%	21.35%	17.01%
Spliced Mega Cap Index	4.16%	5.33%	5.33%	56.49%	17.90%	17.15%	14.37%
Spliced Mega Cap Value Index	6.46%	10.15%	10.15%	48.00%	11.81%	12.84%	11.73%
Spliced Mid Cap Growth Idx	-1.13%	1.25%	1.25%	70.40%	19.24%	17.39%	13.10%
Spliced Mid Cap Index	2.37%	7.18%	7.18%	70.66%	14.67%	14.62%	12.33%
Spliced Mid Cap Value Index	6.04%	13.71%	13.71%	69.81%	9.84%	11.67%	11.36%
Spliced Pacific Stock Index	1.39%	2.65%	2.65%	50.54%	6.68%	10.80%	6.74%
Spliced Small and Mid Cap Index	2.66%	10.78%	10.78%	85.25%	15.63%	15.86%	12.72%
Spliced Small Cap Growth Index	-2.78%	2.55%	2.55%	83.12%	19.40%	19.04%	13.10%
Spliced Small Cap Index	1.61%	10.21%	10.21%	87.68%	14.94%	15.58%	12.12%
Spliced Small Cap Value Index	5.21%	16.83%	16.83%	89.72%	10.77%	12.41%	11.06%
Spliced Social Index	3.57%	4.70%	4.70%	60.57%	18.84%	18.16%	15.30%
Spliced Total Stock Market Index	3.47%	6.43%	6.43%	62.75%	17.14%	16.67%	13.80%
Spliced Total World Stock Index	2.65%	5.10%	5.10%	57.56%	12.30%	13.58%	9.53%
Spliced U.S. Government Money Market Funds Average	—	—	—	—	—	—	—
Spliced US IMI Consumer Stapl 25/50	8.00%	2.78%	2.78%	32.83%	12.42%	8.49%	11.85%

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Spliced US IMI Energy 25/50	2.96%	32.18%	32.18%	85.99%	-6.18%	-1.22%	-2.46%
Spliced US IMI Financials 25/50	5.79%	16.49%	16.49%	70.53%	9.40%	15.27%	11.98%
Spliced US IMI Health Care 25/50	1.95%	2.46%	2.46%	39.49%	16.14%	14.90%	16.06%
Spliced US IMI Industrials 25/50	7.59%	11.51%	11.51%	73.76%	12.75%	14.49%	12.47%
Spliced US IMI Materials 25/50	8.21%	10.35%	10.35%	83.10%	12.57%	14.15%	9.29%
Spliced US IMI Utilities 25/50	10.22%	3.02%	3.02%	19.02%	11.41%	8.96%	11.16%
Spliced Value Index	6.50%	10.99%	10.99%	51.35%	11.41%	12.74%	11.67%
STAR Composite Index	1.47%	2.57%	2.57%	35.62%	11.06%	10.69%	8.59%
Target Retirement 2015 Composite Ix	0.52%	0.36%	0.36%	19.84%	7.78%	7.73%	6.93%
Target Retirement 2020 Composite Ix	0.95%	1.33%	1.33%	27.44%	9.15%	9.23%	7.96%
Target Retirement 2025 Composite Ix	1.23%	1.91%	1.91%	32.91%	10.10%	10.29%	8.62%



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Target Retirement 2030 Composite Ix	1.50%	2.54%	2.54%	37.47%	10.73%	11.10%	9.13%
Target Retirement 2035 Composite Ix	1.76%	3.19%	3.19%	42.13%	11.32%	11.90%	9.64%
Target Retirement 2040 Composite Ix	2.03%	3.84%	3.84%	46.93%	11.90%	12.68%	10.11%
Target Retirement 2045 Composite Ix	2.30%	4.49%	4.49%	51.85%	12.50%	13.21%	10.36%
Target Retirement 2050 Composite Ix	2.34%	4.59%	4.59%	52.18%	12.58%	13.26%	10.39%
Target Retirement 2055 Composite Ix	2.34%	4.59%	4.59%	52.18%	12.58%	13.26%	10.39%
Target Retirement 2060 Composite Ix	2.34%	4.59%	4.59%	52.18%	12.58%	13.26%	—

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Target Retirement 2065 Composite Ix	2.34%	4.59%	4.59%	52.18%	12.58%	—	—
Target Retirement Income Compos. Ix	0.41%	0.11%	0.11%	17.35%	7.39%	6.65%	5.87%
Tax-Exempt Money Mkt Funds Average	—	—	—	—	—	—	—
Tax-Managed Balanced Compos. Index	2.15%	2.83%	2.83%	30.54%	11.41%	10.13%	9.16%
US Gov't Money Market Funds Average	—	—	—	—	—	—	—
Wellesley Income Composite Index	—	—	—	—	—	—	—
Wellington Composite Index	2.26%	2.35%	2.35%	35.98%	13.07%	12.06%	10.71%

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