

Benchmark Returns

Benchmark	Returns as of 06/30/2021		Month End YTD as of 06/30/2021	Average Annual Total Returns as of 06/30/2021			
	1 Month	3 Month		1 Year	3 Year	5 Year	10 Year
Balanced Composite Index	1.85%	5.75%	8.29%	24.84%	14.06%	12.29%	10.55%
BloomBarc 1 Year Municipal Index	-0.01%	0.10%	0.31%	0.79%	1.76%	1.36%	1.09%
BloomBarc 1-15 Year Municipal Index	0.13%	0.90%	0.57%	3.08%	4.45%	2.82%	3.52%
BloomBarc 1-5 Year Municipal Index	0.01%	0.30%	0.30%	1.57%	2.85%	1.91%	1.92%
BloomBarc CA Municipal Index	0.26%	1.34%	0.66%	3.39%	4.88%	3.11%	4.59%
BloomBarc GA Credit Idx Hedged USD	1.02%	2.10%	-1.04%	3.11%	6.44%	4.46%	4.83%
BloomBarc GA ex-USD FIAdjRIC Cp Hgd	0.41%	0.26%	-1.97%	0.15%	4.12%	3.01%	—
BloomBarc MA Municipal Index	0.20%	1.17%	0.51%	3.16%	4.87%	2.92%	3.99%
BloomBarc Municipal Bond Index	0.27%	1.42%	1.06%	4.17%	5.10%	3.25%	4.28%
BloomBarc Municipal CA Intermed Idx	0.04%	0.66%	-0.26%	1.92%	4.19%	2.58%	3.68%
BloomBarc NJ Municipal Index	0.51%	1.98%	2.50%	9.00%	6.41%	4.46%	5.05%
BloomBarc NY Municipal Index	0.33%	1.88%	1.48%	4.53%	4.88%	3.06%	4.08%
BloomBarc OH Municipal Index	0.20%	1.34%	0.76%	3.59%	5.07%	3.15%	4.23%
BloomBarc PA Municipal Index	0.37%	1.56%	1.48%	4.80%	5.62%	3.63%	4.62%
BloomBarc US 0-5 Year TIPS Index	0.03%	1.69%	2.78%	5.95%	4.19%	2.84%	1.70%
BloomBarc US 1-5 Year Credit Index	-0.13%	0.61%	0.04%	1.81%	4.43%	2.92%	2.79%
BloomBarc US 1-5 Year Treasury Idx	-0.26%	0.10%	-0.48%	-0.35%	3.30%	1.77%	1.59%



BloomBarc US 1-5 Yr Corporate Index -0.12% 0.70% 0.10% 2.17% 4.63% 3.11% 3.01%

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BloomBarc US 1-5 Yr Government Idx	-0.26%	0.10%	-0.47%	-0.32%	3.29%	1.78%	1.59%
BloomBarc US 10+ Year Corp Index	3.70%	6.64%	-2.44%	4.54%	11.07%	6.88%	7.68%
BloomBarc US 5-10 Year Corp Index	0.94%	2.85%	-1.15%	3.02%	7.88%	4.79%	5.31%
BloomBarc US 5-10 Year Credit Index	0.92%	2.79%	-1.22%	2.81%	7.68%	4.63%	5.14%
BloomBarc US 5-10 Yr Treasury Index	0.37%	1.84%	-2.69%	-3.14%	5.48%	2.32%	3.40%
BloomBarc US Agg Float Adj Index	0.77%	1.96%	-1.67%	-0.33%	5.44%	3.07%	3.44%
BloomBarc US GNMA Index	-0.03%	-0.02%	-1.00%	-0.95%	3.45%	2.04%	2.46%
BloomBarc US Long Treasury Index	3.57%	6.46%	-7.92%	-10.58%	7.99%	3.13%	6.66%
BloomBarc US LongCredit A/Better lx	3.47%	6.32%	-3.58%	1.24%	10.11%	5.85%	7.38%
BloomBarc US MBS Float Adj Index	-0.05%	0.28%	-0.78%	-0.39%	3.71%	2.24%	2.58%
BloomBarc US Treas Bellwether:1Yr	-0.02%	0.02%	0.10%	0.25%	2.02%	1.52%	0.95%
BloomBarc US Trsy Inflat Prtcd Idx	0.61%	3.25%	1.73%	6.51%	6.53%	4.17%	3.40%
BloomBarc USD EmergMkt GovRIC Caplx	0.79%	4.22%	-1.17%	7.13%	6.59%	4.73%	—
Bloomberg Commodity Index TR	1.85%	13.30%	21.15%	45.61%	3.90%	2.40%	-4.44%
CA Tax-Exempt Money Mkt Funds Avg	—	—	—	—	—	—	—
Communication Services Spliced Idx	4.07%	10.98%	20.15%	55.85%	20.41%	10.01%	10.30%



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Conservative Growth Composite Index 0.91% 3.76% 4.03% 15.10% 9.60% 8.23% 6.99%

Consumer Discretionary Spliced Idx 3.11% 6.51% 14.32% 59.93% 24.58% 22.60% 18.74%

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CRSP US Total Market Index	2.55%	8.29%	15.25%	44.35%	18.76%	17.91%	14.69%
Dividend Growth Spliced Index	-0.10%	5.79%	10.46%	34.52%	17.30%	15.48%	13.09%
FTSE All-World ex US Index	-0.66%	5.52%	9.43%	36.44%	9.80%	11.35%	5.78%
FTSE All-World Index	1.23%	7.35%	12.49%	39.62%	14.89%	14.97%	10.25%
FTSE AW ex US High Div Yield Idx	-1.54%	5.11%	13.39%	38.47%	7.14%	9.35%	4.58%
FTSE Emerging Index	-0.02%	5.18%	8.12%	38.81%	11.69%	12.45%	4.33%
FTSE Global All Cap Index Hdg.	2.00%	6.88%	13.75%	38.42%	15.11%	15.42%	11.68%
FTSE Global Small-Cap ex US Index	-0.51%	7.02%	12.15%	44.44%	8.25%	10.79%	5.90%
FTSE High Dividend Yield Index	-1.16%	4.54%	16.07%	37.17%	11.71%	11.48%	12.35%
Global Wellesley Income Comp Index	0.02%	2.82%	4.15%	13.88%	7.42%	—	—
Global Wellington Composite Index	1.20%	5.57%	7.95%	25.68%	12.28%	—	—
Growth Composite Index	1.15%	6.10%	10.04%	32.37%	13.66%	13.18%	10.32%
High-Yield Corporate Composite Idx	1.20%	2.44%	2.75%	12.64%	7.74%	7.01%	6.38%
iMoneyNet MFR Treasury Funds Avg	—	—	—	—	—	—	—
Income Composite Index	0.79%	2.60%	1.11%	7.22%	7.38%	5.67%	5.28%



Information Technology Spliced Idx	7.32%	11.50%	13.12%	44.34%	31.63%	31.69%	21.77%
JP Morgan EMBI Global Diversified	0.73%	4.06%	-0.66%	7.53%	6.71%	4.86%	5.65%
Managed Allocation Composite Index	1.10%	5.52%	8.15%	25.85%	11.58%	10.65%	7.87%

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Moderate Growth Composite Index	1.03%	4.93%	7.01%	23.47%	11.70%	10.73%	8.76%
MSCI AC World Index ex USA Net	-0.65%	5.48%	9.16%	35.72%	9.38%	11.08%	5.45%
MSCI US Broad Market Index	2.59%	8.42%	15.37%	44.64%	18.83%	17.98%	14.77%
MSCI US Prime Market 750 Index	2.69%	8.75%	14.90%	42.86%	19.36%	18.15%	15.00%
MSCI US Small Cap 1750 Index	1.71%	5.25%	19.78%	64.08%	14.49%	16.31%	12.87%
NASDAQ Intl Dividend Achievers Sel Ix	0.35%	6.38%	7.83%	32.76%	12.36%	11.52%	—
NASDAQ US Dividend Achievers Select	-0.10%	5.79%	10.46%	34.52%	17.30%	15.48%	13.09%
NY Tax-Exempt Money Mkt Funds Avg	—	—	—	—	—	—	—
Real Estate Spliced Index	2.63%	11.69%	21.44%	34.50%	12.03%	7.18%	9.82%
Russell 1000 Growth Index	6.27%	11.93%	12.99%	42.50%	25.14%	23.66%	17.87%
Russell 1000 Index	2.51%	8.54%	14.95%	43.07%	19.16%	17.99%	14.90%
Russell 1000 Value Index	-1.15%	5.21%	17.05%	43.68%	12.42%	11.87%	11.61%
Russell 2000 Growth Index	4.69%	3.92%	8.98%	51.36%	15.94%	18.76%	13.52%
Russell 2000 Index	1.94%	4.29%	17.54%	62.03%	13.52%	16.47%	12.34%



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Russell 2000 Value Index	-0.61%	4.56%	26.69%	73.28%	10.27%	13.62%	10.85%
Russell 2500 Growth Index	5.37%	6.04%	8.67%	49.63%	20.15%	20.68%	14.83%
Russell 2500 Value Index	-1.32%	5.00%	22.68%	63.23%	10.60%	12.29%	10.93%
Russell 3000 Index	2.47%	8.24%	15.11%	44.16%	18.73%	17.89%	14.70%

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Russell Midcap Growth Index	6.80%	11.07%	10.44%	43.77%	22.39%	20.52%	15.13%
Russell Midcap Value Index	-1.16%	5.66%	19.45%	53.06%	11.86%	11.79%	11.75%
S&P 500 Growth Index	5.68%	11.93%	14.31%	41.36%	23.08%	21.83%	17.29%
S&P 500 Index	2.33%	8.55%	15.25%	40.79%	18.67%	17.65%	14.84%
S&P 500 Value Index	-1.17%	4.99%	16.30%	39.54%	13.14%	12.54%	11.85%
S&P Completion Index	3.46%	7.12%	15.42%	61.60%	18.50%	18.73%	13.93%
S&P EPAC SmallCap Index	-1.17%	5.31%	9.16%	42.23%	8.53%	11.83%	8.14%
S&P Global ex U.S. Property Index	-0.82%	4.57%	7.13%	25.81%	3.76%	5.65%	5.17%
S&P MidCap 400 Growth Index	1.07%	3.43%	12.28%	45.43%	14.23%	15.25%	12.63%
S&P MidCap 400 Index	-1.02%	3.64%	17.59%	53.24%	13.17%	14.29%	12.40%
S&P MidCap 400 Value Index	-2.81%	3.84%	22.97%	61.43%	11.52%	12.81%	11.88%
S&P National AMT-Free Muni Bond Idx	0.26%	1.53%	1.12%	4.04%	4.93%	3.09%	4.09%
S&P SmallCap 600 Growth Index	1.56%	3.76%	16.49%	57.49%	13.21%	16.91%	13.95%



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S&P SmallCap 600 Index	0.33%	4.51%	23.56%	67.40%	12.20%	15.82%	13.49%
S&P SmallCap 600 Value Index	-0.69%	5.17%	30.59%	77.26%	10.78%	14.42%	12.88%
Spl BloomBarc US 5-10Yr G/Cr FltAdj	0.63%	2.30%	-1.96%	-0.18%	6.65%	3.50%	4.29%
Spl BloomBarc US Long Treasury Idx	3.57%	6.46%	-7.92%	-10.58%	7.99%	3.19%	6.62%
Spl BloomBarc US Treas 1-3 Yr Idx	-0.17%	-0.04%	-0.09%	0.05%	2.72%	1.61%	1.22%

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Spl BloomBarc US Treas 3-10 Yr Idx	0.00%	1.09%	-1.87%	-2.04%	4.87%	2.21%	2.87%
Spl BloomBarc US1-5YrGov/Cr FlAdjlx	-0.22%	0.27%	-0.30%	0.40%	3.70%	2.18%	1.98%
Spl BloomBarc USLongGv/Cr FltAdj lx	3.56%	6.44%	-4.64%	-1.86%	9.93%	5.45%	7.30%
Spl Total International Stock Index	-0.64%	5.67%	9.70%	37.20%	9.64%	11.29%	5.79%
Spliced Alternative Strategies Idx	0.00%	0.01%	0.03%	0.08%	3.10%	3.89%	—
Spliced BloomBarc USAgg Flt Adjlx	0.77%	1.96%	-1.67%	-0.33%	5.44%	3.07%	3.44%
Spliced Developed ex US Index	-0.95%	5.69%	9.98%	36.43%	9.08%	11.00%	6.42%
Spliced Emerging Markets Index	0.24%	5.70%	8.99%	39.54%	11.65%	12.10%	4.02%
Spliced Energy Index	0.46%	4.84%	14.46%	12.90%	-11.72%	-3.08%	-3.46%
Spliced Equity Income Index	-1.16%	4.54%	16.07%	37.17%	11.71%	11.48%	12.35%
Spliced European Stock Index	-1.61%	7.56%	12.06%	37.16%	9.09%	10.95%	6.01%
Spliced Extended Market Index	3.46%	7.12%	15.42%	61.60%	18.50%	18.73%	13.93%



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Spliced Global Capital Cycles Index	-1.03%	6.72%	11.78%	39.83%	10.49%	11.03%	-1.89%
Spliced Global Equity Index	1.32%	7.39%	12.30%	39.26%	14.57%	14.61%	9.90%
Spliced Growth Index	5.99%	11.71%	13.39%	42.83%	25.35%	23.09%	17.52%
Spliced Health Care Index	2.89%	9.38%	9.86%	23.48%	15.76%	12.36%	13.08%
Spliced Inst Total Stock Market Idx	2.55%	8.29%	15.25%	44.35%	18.76%	17.91%	14.72%
Spliced International Index	-0.65%	5.48%	9.16%	35.72%	9.38%	11.08%	5.45%

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Spliced Large Cap Index	2.72%	8.78%	14.94%	42.26%	19.38%	18.15%	14.98%
Spliced Market Neutral Index USD	0.00%	0.01%	0.03%	0.08%	1.31%	1.14%	0.59%
Spliced Mega Cap Growth Index	5.96%	12.03%	13.78%	42.45%	25.86%	23.95%	18.22%
Spliced Mega Cap Index	2.92%	9.05%	14.86%	41.28%	19.92%	18.60%	15.33%
Spliced Mega Cap Value Index	-0.84%	5.35%	16.04%	39.46%	13.32%	13.12%	12.37%
Spliced Mid Cap Growth Idx	5.61%	10.27%	11.65%	43.86%	21.62%	19.27%	14.17%
Spliced Mid Cap Index	1.81%	7.59%	15.31%	46.93%	16.51%	15.78%	13.16%
Spliced Mid Cap Value Index	-1.94%	4.85%	19.23%	50.11%	11.08%	12.12%	11.96%
Spliced Pacific Stock Index	-0.21%	2.08%	4.78%	32.88%	8.34%	11.08%	6.96%
Spliced Small and Mid Cap Index	1.43%	6.49%	17.97%	56.23%	16.25%	16.57%	13.49%
Spliced Small Cap Growth Index	4.77%	5.81%	8.52%	45.79%	18.83%	19.37%	13.80%



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Spliced Small Cap Index	1.43%	5.59%	16.38%	56.47%	14.73%	15.94%	12.87%
Spliced Small Cap Value Index	-0.94%	5.40%	23.14%	65.61%	10.82%	12.78%	11.86%
Spliced Social Index	3.27%	9.31%	14.45%	42.25%	20.81%	19.92%	16.33%
Spliced Total Stock Market Index	2.55%	8.29%	15.25%	44.35%	18.76%	17.91%	14.71%
Spliced Total World Stock Index	1.14%	7.19%	12.65%	40.91%	14.65%	14.89%	10.25%
Spliced U.S. Government Money Market Funds Average	—	—	—	—	—	—	—
Spliced US IMI Consumer Stapl 25/50	-0.66%	3.17%	6.04%	25.24%	13.76%	8.12%	11.58%
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Spliced US IMI Energy 25/50	5.27%	12.82%	49.13%	57.40%	-6.59%	-0.98%	-0.75%
Spliced US IMI Financials 25/50	-2.77%	7.68%	25.44%	61.69%	13.00%	16.35%	13.37%
Spliced US IMI Health Care 25/50	3.37%	8.50%	11.18%	29.96%	17.68%	15.42%	16.24%
Spliced US IMI Industrials 25/50	-1.88%	4.22%	16.22%	53.18%	15.08%	15.09%	13.09%
Spliced US IMI Materials 25/50	-5.11%	5.04%	15.91%	52.41%	13.46%	14.22%	9.99%
Spliced US IMI Utilities 25/50	-1.81%	-0.36%	2.65%	15.78%	9.62%	7.35%	10.56%
Spliced Value Index	-1.19%	5.25%	16.82%	41.31%	12.86%	13.05%	12.31%
STAR Composite Index	1.17%	5.24%	7.95%	25.06%	12.50%	11.41%	9.04%
Target Retirement 2015 Composite Ix	0.77%	3.41%	3.78%	13.75%	8.77%	8.04%	7.18%
Target Retirement 2020 Composite Ix	0.90%	4.22%	5.61%	19.17%	10.38%	9.72%	8.31%



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Target Retirement 2025 Composite Ix	1.01%	4.83%	6.83%	23.06%	11.52%	10.92%	9.05%
Target Retirement 2030 Composite Ix	1.07%	5.29%	7.96%	26.38%	12.29%	11.86%	9.64%
Target Retirement 2035 Composite Ix	1.11%	5.73%	9.10%	29.72%	13.02%	12.77%	10.21%
Target Retirement 2040 Composite Ix	1.16%	6.17%	10.25%	33.13%	13.73%	13.68%	10.73%
Target Retirement 2045 Composite Ix	1.20%	6.61%	11.40%	36.62%	14.47%	14.31%	11.03%
Target Retirement 2050 Composite Ix	1.21%	6.69%	11.58%	37.02%	14.58%	14.38%	11.06%
Target Retirement 2055 Composite Ix	1.21%	6.69%	11.58%	37.02%	14.58%	14.38%	11.06%
Target Retirement 2060 Composite Ix	1.21%	6.69%	11.58%	37.02%	14.58%	14.38%	—

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Target Retirement 2065 Composite Ix	1.21%	6.69%	11.58%	37.02%	14.58%	—	—
Target Retirement Income Compos. Ix	0.74%	3.23%	3.34%	12.22%	8.35%	6.91%	6.02%
Tax-Exempt Money Mkt Funds Average	—	—	—	—	—	—	—
Tax-Managed Balanced Compos. Index	1.32%	4.69%	7.65%	21.80%	12.29%	10.64%	9.49%
US Gov't Money Market Funds Average	—	—	—	—	—	—	—
Wellesley Income Composite Index	0.44%	3.53%	4.31%	12.74%	8.81%	6.77%	7.35%
Wellington Composite Index	1.97%	6.58%	9.09%	25.69%	14.74%	12.92%	11.31%

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