

Glassman Wealth Services Historical Returns Chart



1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	
DJ Wilshire REITs 36.87	Russell 1000 Value 35.18	Russell 1000 Growth 38.71	MSCI Emerging Mkts 66.41	DJ UBS Commodity 31.84	Russell 2000 Value 14.03	DJ UBS Commodity 25.91	MSCI Emerging Mkts 56.58	DJ Wilshire REITs 34.78	MSCI Emerging Mkts 34.54	DJ Wilshire REITs 35.86	MSCI Emerging Mkts 39.78	DJ CS Mgd Futures Index 18.33	MSCI Emerging Mkts 79.02	Russell 2000 Growth 29.09	DJ Wilshire REITs 10.84
DJ UBS Commodity 23.17	S&P 500 33.36	S&P 500 28.58	Russell 2000 Growth 43.09	DJ Wilshire REITs 30.74	DJ Wilshire REITs 10.49	DJ CS Mgd Futures Index 18.33	Russell 2000 Growth 48.54	MSCI Emerging Mkts 25.95	DJ UBS Commodity 21.36	MSCI Emerging Mkts 32.59	DJ UBS Commodity 16.22	Barclays IT Gvt/Credit 5.08	Russell 1000 Growth 37.21	DJ Wilshire REITs 28.07	Russell 2000 Value 9.80
Russell 1000 Growth 23.12	Russell 2000 Value 31.79	DJ CS Mgd Futures Index 20.64	Russell 1000 Growth 33.16	Russell 2000 Value 22.83	LB IT Gvt/Credit 8.98	LB IT Gvt/Credit 9.82	Russell 2000 47.25	Russell 2000 Value 22.25	DJ Wilshire REITs 14.04	MSCI EAFE 26.86	Russell 1000 Growth 11.81	U.S. 30 Day TBill 1.35	Russell 2000 Growth 34.47	Russell 2000 26.85	MSCI Emerging Mkts 8.99
S&P 500 23.07	Russell 1000 Growth 30.49	MSCI EAFE 20.33	MSCI EAFE 27.30	LB Municipals 11.70	LB Municipals 5.08	LB Municipals 9.60	Russell 2000 Value 46.03	MSCI EAFE 20.70	MSCI EAFE 14.02	Russell 2000 Value 23.48	MSCI EAFE 11.63	U.S. Inflation -.04	MSCI EAFE 32.46	Russell 2000 Value 24.50	Russell 2000 7.64
Russell 1000 Value 21.64	Russell 2000 22.36	Russell 1000 Value 15.63	HFRI FoF Composite 26.47	LB IT Gvt/Credit 10.10	U.S. 30 Day TBill 3.83	DJ Wilshire REITs 2.65	MSCI EAFE 39.17	Russell 2000 18.33	HFRI FoF Composite 7.5	Russell 1000 Value 22.25	HFRI FoF Composite 10.25	Barclays Municipals -2.47	DJ Wilshire REITs 28.46	MSCI Emerging Mkts 19.20	Russell 1000 Value 7.62
Russell 2000 Value 21.37	DJ Wilshire REITs 19.80	LB IT Gvt/Credit 8.42	DJ UBS Commodity 24.35	Russell 1000 Value 7.01	HFRI FoF Composite 2.8	U.S. Inflation 2.48	DJ Wilshire REITs 37.06	Russell 1000 Value 16.49	Russell 1000 Value 7.05	Russell 2000 18.37	LB IT Gvt/Credit 7.39	HFRI FoF Composite -21.37	Russell 2000 27.17	DJ UBS Commodity 16.83	DJ CS Mgd Futures Index 7.27
Russell 2000 16.49	HFRI FoF Composite 16.2	LB Municipals 6.48	Russell 2000 21.26	U.S. 30 Day TBill 5.89	Russell 2000 2.49	U.S. 30 Day TBill 1.65	Russell 1000 Value 30.03	Russell 2000 Growth 14.31	Russell 1000 Growth 5.26	S&P 500 15.80	Russell 2000 Growth 7.05	Russell 2000 Value -28.92	S&P 500 26.46	Russell 1000 Growth 16.71	S&P 500 6.76
HFRI FoF Composite 14.39	Russell 2000 Growth 12.95	U.S. 30 Day TBill 4.86	S&P 500 21.05	DJ CS Mgd Futures Index 4.24	DJ CS Mgd Futures Index 1.90	HFRI FoF Composite 1.02	S&P 500 28.70	S&P 500 10.87	S&P 500 4.91	Russell 2000 Growth 13.35	DJ CS Mgd Futures Index 6.01	Russell 2000 -33.79	Russell 2000 Value 20.58	Russell 1000 Value 15.51	DJ UBS Commodity 6.33
DJ CS Mgd Futures Index 11.97	LB Municipals 9.20	U.S. Inflation 1.61	Russell 1000 Value 7.35	HFRI FoF Composite 4.07	U.S. Inflation 1.60	MSCI Emerging Mkts -6.00	DJ UBS Commodity 23.93	DJ UBS Commodity 9.15	Russell 2000 Value 4.71	HFRI FoF Composite 10.39	S&P 500 5.49	DJ UBS Commodity -35.85	Russell 1000 Value 19.69	S&P 500 15.06	HFRI FoF Composite 6.27
Russell 2000 Growth 11.26	LB IT Gvt/Credit 7.87	Russell 2000 Growth 1.23	U.S. 30 Day TBill 4.68	U.S. Inflation 3.44	MSCI Emerging Mkts -2.37	Russell 2000 Value -11.43	Russell 1000 Growth 29.75	HFRI FoF Composite 6.86	Russell 2000 4.55	Russell 1000 Growth 9.07	U.S. 30 Day TBill 4.56	Russell 1000 Value -36.85	DJ UBS Commodity 18.91	DJ CS Mgd Futures Index 12.22	Russell 1000 Growth 5.73
MSCI EAFE 6.36	U.S. 30 Day TBill 5.26	Russell 2000 -2.55	U.S. Inflation 2.68	Russell 2000 -3.02	Russell 2000 Growth -9.23	Russell 1000 Value 15.52	DJ CS Mgd Futures Index 14.15	Russell 1000 Growth 6.30	Russell 2000 Growth 4.15	DJ CS Mgd Futures Index 8.05	U.S. Inflation 4.10	S&P 500 -37	Barclays Municipals 12.91	MSCI EAFE 8.21	Barclays IT Gvt/Credit 5.71
MSCI Emerging Mkts 6.03	DJ CS Mgd Futures Index 3.12	HFRI FoF Composite -5.11	LB IT Gvt/Credit 0.39	S&P 500 -9.11	Russell 1000 Value 5.59	MSCI EAFE -15.66	HFRI FoF Composite 11.61	DJ CS Mgd Futures Index 5.97	LB Municipals 3.53	LB Municipals 4.85	LB Municipals 3.36	Russell 1000 Growth -38.44	HFRI FoF Composite 11.47	Barclays IT Gvt/Credit 5.89	Barclays Municipals 5.17
U.S. 30 Day TBill 5.21	MSCI EAFE 2.06	Russell 2000 Value -6.45	Russell 2000 Value 1.49	MSCI EAFE -13.96	S&P 500 -11.89	Russell 2000 20.49	LB Municipals 5.32	LB Municipals 4.47	U.S. Inflation 3.34	U.S. 30 Day TBill 4.75	Russell 1000 Value 0.17	Russell 2000 Growth -38.54	Barclays IT Gvt/Credit 5.24	HFRI FoF Composite 5.60	MSCI EAFE 5.09
LB Municipals 4.44	U.S. Inflation 1.70	DJ Wilshire REITs -17.43	LB Municipals -2.07	Russell 1000 Growth -22.42	DJ UBS Commodity -19.51	S&P 500 -22.10	LB IT Gvt/Credit 4.30	U.S. Inflation 3.34	U.S. 30 Day TBill 2.93	LB IT Gvt/Credit 4.07	Russell 2000 1.57	DJ Wilshire REITs -39.2	U.S. Inflation 2.78	Barclays Municipals 2.38	Russell 2000 Growth 4.89
LB IT Gvt/Credit 4.06	DJ UBS Commodity -3.39	MSCI Emerging Mkts -25.34	DJ Wilshire REITs -3.19	Russell 2000 Growth -22.43	Russell 1000 Growth -20.42	Russell 1000 Growth -27.88	U.S. Inflation 2.04	LB IT Gvt/Credit 3.04	LB IT Gvt/Credit 1.57	DJ UBS Commodity 2.07	Russell 2000 Value 9.78	MSCI EAFE -43.06	U.S. 30 Day TBill .09	U.S. Inflation 1.39	U.S. 30 Day TBill 3.04
U.S. Inflation 3.38	MSCI Emerging Mkts -11.59	DJ UBS Commodity -27.03	DJ CS Mgd Futures Index -4.69	MSCI Emerging Mkts -30.61	MSCI EAFE -21.21	Russell 2000 Growth -30.26	U.S. 30 Day TBill 1.02	U.S. 30 Day TBill 1.20	DJ CS Mgd Futures Index -1.1	U.S. Inflation 2.52	DJ Wilshire REITs -17.56	MSCI Emerging Mkts -53.18	DJ CS Mgd Futures Index -6.57	U.S. 30 Day TBill .12	U.S. Inflation 2.42

15 year Annualized Returns

Source: Ibbotson Associates &