## **Historical Index Analysis**











Graphs show values over the last 2 years

Index Returns S&P 500														
	S&P 500									S&P MARC5	Dynamo		Barclays Focus50	
			1-year	1-year	2-year	1-year	1-year	1-year						
	Starting	1-year	Daily	Monthly	Monthly	Monthly Cap			1-year	1-year	1-year	2-year	1-year	2-year
Issue Date	Index Value	PTP	Avg	Avg	Avg**		2.00% Cap		PTP	PTP	PTP	PTP**	PTP	PTP**
7/1/2022	3785.38	17.57%	5.88%	6.59%	17.01%	-11.38%	-8.38%	-2.38%	16.57%	0.16%	0.68%	-1.52%	-1.91%	-2.32%
8/1/2022	4130.29	11.11%	-1.78%	-1.39%	8.64%	-11.38%	-8.38%	-2.38%	12.97%	-0.25%	1.42%	-1.97%	-3.13%	-1.36%
9/1/2022	3955.00	13.97%	3.24%	4.15%	15.24%	-8.91%	-5.91%	0.09%	13.30%	0.81%	0.80%	-2.35%	-3.01%	1.68%
10/1/2022	3585.62	19.59%	15.10%	16.51%	29.65%	-4.44%	-1.44%	4.56%	10.38%	0.33%	-0.06%	-0.56%	-2.89%	4.63%
11/1/2022	3871.98	8.31%	7.80%	8.59%	22.03%	-8.14%	-5.64%	-0.64%	2.29%	0.31%	-2.20%	-3.25%	-4.80%	0.51%
12/1/2022	4080.11	11.95%	3.43%	4.04%	17.80%	-8.14%	-5.64%	-0.64%	7.40%	1.45%	-2.24%	-1.70%	-3.92%	1.32%
1/1/2023	3839.50	24.23%	11.52%	12.58%	27.40%	-0.74%	2.26%	8.26%	19.86%	3.46%	-1.39%	-4.74%	-2.21%	-1.83%
2/1/2023	4076.60	18.86%	6.75%	7.61%	22.00%	-0.74%	1.85%	6.85%	16.80%	1.51%	-3.15%	-5.70%	-1.79%	-0.83%
3/1/2023	3970.15	28.36%	11.44%	12.86%	27.35%	3.37%	6.46%	12.46%	26.35%	3.78%	-2.70%	-5.62%	0.57%	2.92%
4/1/2023	4109.31	27.86%	10.15%	11.36%	24.56%	3.37%	6.46%	12.46%	28.24%	3.52%	-2.20%	-7.35%	0.77%	2.20%
5/1/2023	4169.48	20.78%	10.52%	11.48%	24.16%	-2.25%	0.83%	6.83%	17.66%	1.38%	-4.76%	-10.29%	-2.15%	0.15%
6/1/2023	4179.83	26.26%	12.51%	13.39%	25.58%	-1.00%	2.59%	9.59%	23.22%	3.57%	-1.61%	-8.53%	0.95%	2.12%
7/1/2023	4450.38	22.70%	7.58%	8.39%	19.59%	-1.00%	2.59%	9.59%	19.55%	4.58%	-2.19%	-9.39%	-0.42%	0.54%
8/1/2023	4588.96	20.34%	6.24%	6.81%		-1.37%	1.72%	7.72%	17.72%	5.06%	-3.34%		1.83%	
9/1/2023	4507.66	25.31%	10.17%	10.85%		1.90%	5.49%	11.77%	20.17%	7.27%	-3.12%		4.84%	
10/1/2023	4288.05	34.38%	18.03%	19.39%		8.27%	12.36%	18.67%	31.46%	12.17%	-0.50%		7.74%	
11/1/2023	4193.80	36.04%	23.90%	25.08%		9.48%	13.57%	19.87%	32.64%	10.51%	-1.08%		5.58%	
12/1/2023	4567.80	32.06%	16.41%	17.51%		9.48%	13.57%	19.87%	29.33%	8.05%	0.55%		5.46%	
1/1/2024	4769.83	23.31%	13.75%	14.47%		5.48%	9.07%	14.37%	14.00%	3.87%	-3.40%		0.39%	
2/1/2024	4845.65	24.66%	13.95%	14.74%		5.48%	9.48%	15.49%	14.11%	5.41%	-2.64%		0.97%	
3/1/2024	5096.27	16.84%	9.93%	10.50%		2.56%	6.06%	11.06%	4.95%	5.95%	-3.01%		2.33%	
4/1/2024	5254.35	6.80%	7.42%	7.74%		-4.70%	-1.70%	2.31%	-3.07%	4.37%	-5.27%		1.43%	
5/1/2024	5035.69	10.59%	12.53%	13.30%		-1.30%	1.70%	5.71%	0.32%	6.00%	-5.80%		2.35%	
6/1/2024	5277.51	12.02%	8.81%	9.11%		-1.30%	1.70%	5.71%	-1.07%	4.47%	-7.03%		1.16%	
7/1/2024	5460.48	13.63%	5.60%	6.59%		-1.30%	1.70%	5.71%	0.10%	4.76%	-7.37%		0.96%	
YTD thru 6/30/2025		5.5%							-0.2%	3.9%	-3.4%		0.9%	
Average since 2000*		7.3%	7.3%	3.9%	7.4%	-7.6%	-5.0%	-0.9%	12.2%	4.5%	3.1%	6.1%	4.5%	9.3%

\* For Dynamo, this is the average growth since 4/30/2004. For MARC5, this is the average growth since 12/30/2003. For Barclays Focus50, this is the average growth since 12/1/2003. For S&P 500 Dynamic Intraday, this is the average growth since 12/30/2005.

\*\* This represents growth over a 2-year period. To compare returns with a 1-year period, these numbers should be annualized.

Monthly cap returns for both a 1.50%, 2.00% & 3.00% Monthly Cap are shown above. All other crediting methods do not reflect any caps, spreads or participation rates and are actual index returns over the time

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