

SORT BY: **Highest Return**

TIME FRAME: **YTD**

| | INDEX | INDEX CLOSING PRICES | | YTD RETURN |
|----|--|----------------------|-----------|---------------|
| | | Jan-21 | Feb-21 | |
| 1 | BNP Paribas High Dividend Plus | 196.98 | 275.83 | 40.03% |
| 2 | S&P 500 Sector Rotator Daily RC2 5% ER | 224.52 | 277.99 | 23.82% |
| 3 | Russell 2000 | 1,945.91 | 2,126.16 | 9.26% |
| 4 | Janus SG Market Consensus II | 247.53 | 263.48 | 6.44% |
| 5 | iShares US Real Estate | 82.74 | 87.34 | 5.56% |
| 6 | NASDAQ-100 | 12,698.45 | 13,403.39 | 5.55% |
| 7 | S&P 400 | 2,269.45 | 2,388.77 | 5.26% |
| 8 | NASDAQ FC INDEX | 249.52 | 258.54 | 3.61% |
| 9 | Deutsche Bank CROCI US II TR | 22,582.75 | 23,299.70 | 3.17% |
| 10 | Dow Jones Real Estate RC 10% | 1,250.42 | 1,287.25 | 2.95% |
| 11 | S&P 500 Total Return | 7,645.27 | 7,804.31 | 2.08% |
| 12 | PIMCO Global Optima | 369.79 | 377.33 | 2.04% |
| 13 | iShares Core S&P 500 | 370.22 | 377.60 | 1.99% |
| 14 | citi Flexible Allocation 6 ER | 350.80 | 357.79 | 1.99% |
| 15 | S&P 500 | 3,700.65 | 3,773.86 | 1.98% |
| 16 | iShares MSCI ACWI | 90.22 | 91.98 | 1.95% |
| 17 | Annuity Linked TVI | 290.22 | 295.19 | 1.71% |
| 18 | Morgan Stanley Dynamic Rotator | 315.14 | 320.26 | 1.62% |
| 19 | PIMCO Global Elite Markets | 298.58 | 302.87 | 1.44% |
| 20 | JP Morgan ETF Efficiente 5 | 141.56 | 143.28 | 1.22% |
| 21 | Morgan Stanley Diversified Select | 269.34 | 272.60 | 1.21% |
| 22 | Barclays Shiller Global | 229.15 | 231.80 | 1.16% |
| 23 | Merrill Lynch GPA | 212.71 | 215.01 | 1.08% |
| 24 | S&P 500 RC 7.5% | 293.06 | 296.08 | 1.03% |
| 25 | Morgan Stanley Target Equity Balance | 295.24 | 298.21 | 1.01% |
| 26 | PIMCO Tactical Balance ER | 215.90 | 218.06 | 1.00% |
| 27 | S&P 500 RC 10% | 3,957.44 | 3,996.95 | 1.00% |
| 28 | JP Morgan Sector Rotator 5 | 159.36 | 160.88 | 0.95% |
| 29 | PIMCO Tactical Balance | 252.41 | 254.76 | 0.93% |
| 30 | BNP Paribas Momentum Multi Asset 5 | 273.30 | 275.83 | 0.93% |
| 31 | AI Powered US Equity Index | 2,455.22 | 2,476.74 | 0.88% |
| 32 | Goldman Sachs Voyager | 107.92 | 108.85 | 0.86% |
| 33 | JP Morgan Mozaic II | 379.91 | 382.71 | 0.74% |
| 34 | S&P 500 Economic Cycle Factor Rotator | 382.35 | 385.08 | 0.71% |
| 35 | Goldman Sachs Dynamo Strategy | 195.83 | 197.18 | 0.69% |
| 36 | Morgan Stanley Dynamic Balance | 270.08 | 271.93 | 0.68% |
| 37 | S&P 500 RC 8% | 3,955.42 | 3,982.16 | 0.68% |
| 38 | Deutsche Bank CROCI Sectors II 5.5% VCI | 3,650.18 | 3,673.98 | 0.65% |
| 39 | Bloomberg Dynamic Balance I | 916.01 | 921.72 | 0.62% |
| 40 | S&P 500 RC 5% TR | 234.02 | 235.46 | 0.62% |
| 41 | S&P 500 RC 5% ER | 152.51 | 153.44 | 0.61% |
| 42 | RBA Select Equity Yield CIBC 5% | 157.78 | 158.73 | 0.60% |
| 43 | Morgan Stanley Dynamic Allocation | 1,295.38 | 1,303.11 | 0.60% |
| 44 | Barclays Atlas 5 | 284.08 | 285.76 | 0.59% |
| 45 | Morgan Stanley Dynamic Contribution | 285.03 | 286.66 | 0.57% |
| 46 | NYSE ZEBRA EDGE | 311.97 | 313.36 | 0.45% |
| 47 | Barclays Armour II | 249.83 | 250.70 | 0.35% |
| 48 | Goldman Sachs Momentum Builder Multi-Asset Class | 197.17 | 197.85 | 0.34% |
| 49 | Goldman Sachs Motif Capital Aging of America | 117.84 | 118.24 | 0.34% |
| 50 | Deutsche Bank CROCI Sectors III 5.5% VCI | 3,618.69 | 3,630.94 | 0.34% |

**For agent use and allocation recommendation purposes only. The Index Resource Center LLC and all affiliated companies will not be responsible for inaccuracies in this report. Rates are based on index movements starting ten years ago on the first business day of the month stated on this report moving forward ten years. Initial method rates are used. Future carrier rate changes are not considered. Crediting methods represented in this report may not be available in all states. The carrier(s) (insurance company/companies) listed on this report do not represent, nor claim any assistance to the methods used, the data used, or the calculations used for the data on this report. Rates are all based upon maximum premium bands and maximum bonus. Bonuses may vary by annuitant age and state approval. Some indexes use hypothetical backtesting to achieve the ten years of performance.*

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|----|--|----------------------|---|-----------|---------------|
| | | Jan-21 | — | Feb-21 | |
| 51 | AQR DynamiQ Allocation | 188.60 | — | 189.23 | 0.34% |
| 52 | S&P US Retiree Spending | 506.28 | — | 507.98 | 0.34% |
| 53 | Morgan Stanley 3D | 613.03 | — | 615.08 | 0.33% |
| 54 | Bloomberg Dynamic Balance II | 273.61 | — | 274.34 | 0.27% |
| 55 | JP Morgan Strategic Balanced | 222.79 | — | 223.38 | 0.26% |
| 56 | Fidelity Multifactor Yield 5% ER | 279.16 | — | 279.64 | 0.17% |
| 57 | Morgan Stanley Global Opportunities | 274.50 | — | 274.79 | 0.11% |
| 58 | S&P 500 Aristocrates TR | 2,937.32 | — | 2,938.90 | 0.05% |
| 59 | Bloomberg Dynamic Balance II ER | 238.36 | — | 238.47 | 0.05% |
| 60 | Credit Suisse Momentum | 2,502.90 | — | 2,503.29 | 0.02% |
| 61 | S&P 500 Aristocrates ER | 1,721.17 | — | 1,721.43 | 0.02% |
| 62 | Hang Seng | 26,567.68 | — | 26,567.68 | 0.00% |
| 63 | Nikkei 225 | 26,787.54 | — | 26,787.54 | 0.00% |
| 64 | 10 Year Treasury | 0.64 | — | 0.64 | 0.00% |
| 65 | Dow Jones Real Estate | 333.16 | — | 333.16 | 0.00% |
| 66 | EuroStoxx 50 | 3,525.24 | — | 3,525.24 | 0.00% |
| 67 | BNP Paribas MAD 5 | 265.51 | — | 265.47 | -0.01% |
| 68 | Dow Jones Industrial Average | 30,223.89 | — | 30,211.91 | -0.04% |
| 69 | Wisdom Tree Siegel Strategic Value | 247.37 | — | 247.20 | -0.07% |
| 70 | iShares MSCI EAFE | 73.34 | — | 73.25 | -0.12% |
| 71 | AB All Market Index | 238.87 | — | 238.36 | -0.21% |
| 72 | Societe Generale Columbia Adaptive Risk Allocation | 278.62 | — | 278.02 | -0.22% |
| 73 | Morningstar Dividend Yield Focus TV 5 TR USD | 169.82 | — | 169.43 | -0.23% |
| 74 | CIBC Balanced Asset 10 | 385.79 | — | 384.88 | -0.24% |
| 75 | Barclays Low Vol 5 | 203.42 | — | 202.92 | -0.24% |
| 76 | Barclays Shiller CAPE | 535.32 | — | 533.84 | -0.28% |
| 77 | US Innovative Leaders 5 | 255.26 | — | 254.47 | -0.31% |
| 78 | CS Tactical Multi Asset | 260.39 | — | 259.47 | -0.35% |
| 79 | Fidelity AIM Dividend | 264.39 | — | 263.32 | -0.40% |
| 80 | Merrill Lynch Strategic Balanced | 1,701.47 | — | 1,693.74 | -0.45% |
| 81 | Merrill Lynch RPM | 264.66 | — | 263.05 | -0.61% |
| 82 | Janus SG Market Consensus | 265.23 | — | 263.48 | -0.66% |
| 83 | First Trust Capital Strength Barclays 5% | 208.63 | — | 207.14 | -0.72% |
| 84 | S&P 500 MARC 5% | 387.90 | — | 384.10 | -0.98% |
| 85 | Smart Passage SG | 538.70 | — | 533.20 | -1.02% |
| 86 | Bank of America Destinations | 234.68 | — | 232.08 | -1.11% |
| 87 | Barclays Focus50 | 258.23 | — | 255.32 | -1.13% |
| 88 | Franklin US | 378.28 | — | 373.85 | -1.17% |
| 89 | Deutsche Bank Momentum Asset Allocator 5.5% VCI | 185.31 | — | 183.10 | -1.19% |
| 90 | Barclays Trailblazer | 211.58 | — | 208.95 | -1.24% |
| 91 | Janus SG Guidance | 287.79 | — | 282.54 | -1.83% |
| 92 | London Gold | 1,943.20 | — | 1,862.95 | -4.13% |
| 93 | SPDR Gold | 182.33 | — | 174.23 | -4.44% |
| 94 | iShares Gold Trust | 18.55 | — | 17.71 | -4.53% |
| 95 | #N/A | #N/A | — | #N/A | #N/A |
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