

| Under A Buttonwood Tree | | Asset Category Returns Since 2011 | | | | | | | | | | | | | 1/31/24 | Data provided by YCHARTS | |
|-------------------------|------------------------------------|-----------------------------------|-------|--------|--------|--------|--------|---------|--------|-------|--------|-------|--------|----------|------------|--------------------------|--|
| ETF | Asset Category | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 YTD | Cumulative | Annualized | |
| | Domestic Equities | | | | | | | | | | | | | | | | |
| VTI | US Total Market | 1.0% | 16.5% | 33.5% | 12.5% | 0.4% | 12.8% | 21.2% | -5.2% | 30.7% | 21.0% | 25.7% | -19.5% | 1.1% | 368.4% | 12.5% | |
| QQQ | NASDAQ 100 | 3.4% | 18.1% | 36.6% | 19.2% | 9.4% | 7.1% | 32.7% | -0.1% | 39.0% | 48.6% | 27.4% | -32.6% | 1.8% | 763.9% | 17.9% | |
| SPY | Large Cap S&P 500 | 1.9% | 16.0% | 32.3% | 13.5% | 1.3% | 12.0% | 21.7% | -4.6% | 31.2% | 18.4% | 28.7% | -18.2% | 1.6% | 389.9% | 12.9% | |
| VTV | Large Cap Value | 1.1% | 15.2% | 33.1% | 13.2% | -1.0% | 17.1% | 17.1% | -5.4% | 25.7% | 2.3% | 26.5% | -2.1% | 0.9% | 295.6% | 11.1% | |
| VUG | Large Cap Growth | 1.8% | 17.0% | 32.5% | 13.6% | 3.2% | 6.3% | 27.7% | -3.3% | 37.0% | 40.2% | 27.3% | -33.2% | 2.2% | 496.2% | 14.6% | |
| IWM | Small Cap Russel 2000 | -4.4% | 16.7% | 38.7% | 5.0% | -4.5% | 21.6% | 14.6% | -11.1% | 25.4% | 20.0% | 14.5% | -20.5% | -3.9% | 195.8% | 8.6% | |
| IWO | Small Cap Growth | -3.0% | 14.8% | 43.3% | 5.9% | -1.3% | 11.7% | 22.3% | -9.4% | 28.5% | 34.7% | 2.5% | -26.3% | -3.1% | 209.7% | 9.0% | |
| IWN | Small Cap Value | -5.8% | 18.0% | 34.3% | 4.1% | -7.7% | 32.0% | 7.7% | -13.0% | 22.0% | 4.7% | 28.0% | -14.8% | -4.6% | 170.0% | 7.9% | |
| VIG | Dividend Paying Stocks | 6.2% | 11.6% | 28.9% | 10.1% | -1.9% | 12.0% | 22.2% | -2.1% | 29.6% | 15.4% | 23.8% | -9.8% | 1.2% | 327.8% | 11.7% | |
| | Domestic Fixed Income | | | | | | | | | | | | | | | | |
| BND | Total Bond Market | 7.9% | 3.9% | -2.1% | 5.8% | 0.6% | 2.5% | 3.6% | -0.1% | 8.8% | 7.7% | -1.9% | -13.1% | -0.2% | 30.6% | 2.1% | |
| TLT | Long Duration Treasuries | 34.0% | 2.6% | -13.4% | 27.3% | -1.8% | 1.2% | 9.2% | -1.6% | 14.1% | 18.2% | -4.6% | -31.2% | -2.2% | 43.8% | 2.8% | |
| IEF | Medium Duration Treasuries | 15.6% | 3.7% | -6.1% | 9.1% | 1.5% | 1.0% | 2.6% | 1.0% | 8.0% | 10.0% | -3.3% | -15.2% | 0.1% | 31.8% | 2.1% | |
| SHY | Short Duration Treasuries | 1.4% | 0.3% | 0.2% | 0.4% | 0.4% | 0.8% | 0.3% | 1.5% | 3.4% | 3.0% | -0.7% | -3.9% | 0.3% | 12.0% | 0.9% | |
| BIL | 1-3mo Treasury Bills | 0.0% | 0.0% | -0.1% | -0.1% | -0.1% | 0.1% | 0.7% | 1.7% | 2.0% | 0.4% | -0.1% | 1.4% | 0.4% | 11.8% | 0.9% | |
| TIP | TIPS | 13.3% | 6.4% | -8.5% | 3.6% | -1.8% | 4.7% | 2.9% | -1.4% | 8.3% | 10.8% | 5.7% | -12.2% | 0.3% | 38.3% | 2.5% | |
| HYG | High Yield Bonds | 6.8% | 11.7% | 5.8% | 1.9% | -5.0% | 13.4% | 6.1% | -2.0% | 14.1% | 4.5% | 3.7% | -11.0% | 0.1% | 76.8% | 4.5% | |
| LQD | Investment Grade Bonds | 9.7% | 10.6% | -2.0% | 8.2% | -1.3% | 6.2% | 7.1% | -3.8% | 17.4% | 11.0% | -1.8% | -17.9% | -0.4% | 58.9% | 3.6% | |
| PFF | Preferred Stocks | -2.0% | 18.2% | -1.0% | 14.1% | 4.3% | 1.3% | 8.1% | -4.6% | 15.9% | 7.9% | 7.1% | -18.2% | 2.8% | 75.3% | 4.4% | |
| CWB | Convertible Bonds | -7.7% | 15.9% | 20.5% | 7.7% | -0.8% | 10.6% | 15.7% | -2.0% | 22.4% | 53.4% | 2.2% | -20.8% | -1.4% | 196.2% | 8.7% | |
| | International Equities | | | | | | | | | | | | | | | | |
| VXUS | World Markets (as of 1/25/2011) | -14.4% | 18.6% | 14.6% | -4.7% | -4.2% | 4.8% | 27.5% | -14.4% | 21.8% | 10.7% | 9.0% | -16.1% | -1.7% | 66.8% | 4.0% | |
| VEA | Developed Markets | -12.3% | 18.6% | 21.8% | -6.0% | -0.4% | 2.7% | 26.4% | -14.8% | 22.6% | 9.7% | 11.7% | -15.4% | -1.1% | 94.7% | 5.2% | |
| EEM | Emerging Markets | -18.8% | 19.1% | -3.7% | -3.9% | -16.2% | 10.9% | 37.3% | -15.3% | 18.2% | 17.0% | -3.6% | -20.6% | -4.5% | 6.5% | 0.5% | |
| VGK | European Markets | -11.6% | 21.6% | 24.4% | -7.1% | -1.9% | -0.4% | 27.0% | -14.9% | 24.9% | 5.5% | 16.9% | -16.0% | -1.2% | 100.9% | 5.5% | |
| VPL | Asia/Pacific Markets | -13.8% | 15.9% | 17.9% | -4.8% | 2.0% | 5.4% | 28.9% | -14.4% | 18.2% | 16.7% | 1.1% | -15.2% | -0.9% | 80.0% | 4.6% | |
| | International Fixed Income | | | | | | | | | | | | | | | | |
| BWX | Government Treasury Bonds | 4.0% | 5.8% | -3.6% | -2.5% | -6.7% | 0.6% | 9.9% | -1.9% | 5.6% | 9.5% | -8.7% | -19.7% | -3.1% | -9.5% | -0.8% | |
| EMLC | Emerging Markets Tsy Bonds | -3.1% | 16.9% | -9.9% | -5.0% | -15.1% | 9.0% | 13.8% | -7.6% | 10.4% | 3.1% | -9.7% | -10.6% | -1.5% | -5.0% | -0.4% | |
| WIP | Govt Inflation Linked Bonds | 2.1% | 14.8% | -5.9% | -0.2% | -10.6% | 4.6% | 12.7% | -6.0% | 8.6% | 8.4% | -4.1% | -15.6% | -4.4% | 8.3% | 0.6% | |
| PICB | Int'l Corporate Bonds | 1.0% | 15.8% | 2.5% | -1.2% | -9.3% | -0.8% | 14.4% | -7.3% | 9.4% | 12.9% | -6.9% | -22.6% | -2.4% | 9.6% | 0.7% | |
| IHY | Int'l High Yield (as Of 4/12/2012) | --- | 10.5% | 7.2% | -5.1% | -3.2% | 11.4% | 12.5% | -4.5% | 12.8% | 8.6% | -2.8% | -14.3% | -0.9% | 42.3% | 3.0% | |
| | Real Estate | | | | | | | | | | | | | | | | |
| VNQ | REITs | 8.6% | 17.6% | 2.3% | 30.4% | 2.4% | 8.6% | 4.9% | -6.0% | 28.9% | -4.7% | 40.5% | -26.2% | -5.1% | 152.9% | 7.4% | |
| VNQI | International REITs | -16.9% | 43.0% | 2.3% | 2.2% | -1.8% | 2.0% | 26.9% | -9.4% | 21.6% | -7.2% | 5.9% | -22.9% | -4.6% | 35.5% | 2.3% | |
| | Commodities | | | | | | | | | | | | | | | | |
| DBC | Commodity Index | -2.6% | 3.5% | -7.6% | -28.1% | -27.6% | 18.6% | 4.9% | -11.6% | 11.8% | -7.8% | 41.4% | 19.3% | 1.3% | -12.0% | -1.0% | |
| GLD | Gold | 9.6% | 6.6% | -28.3% | -2.2% | -10.7% | 8.0% | 12.8% | -1.9% | 17.9% | 24.8% | -4.1% | -0.8% | -1.4% | 35.8% | 2.4% | |
| DBA | Agriculture | -10.7% | -3.2% | -13.2% | 2.6% | -17.2% | -3.1% | -6.1% | -8.7% | -0.7% | -2.5% | 22.4% | 2.5% | 4.3% | -27.9% | -2.5% | |
| DBE | Energy | 2.8% | 1.2% | 4.3% | -40.1% | -35.9% | 23.3% | 5.2% | -12.9% | 19.7% | -25.9% | 57.6% | 33.8% | 4.1% | -19.6% | -1.7% | |
| DBB | Metals | -23.7% | 3.4% | -12.5% | -5.7% | -25.3% | 25.6% | 30.1% | -19.5% | -1.2% | 15.5% | 29.0% | -11.8% | -3.0% | -18.5% | -1.6% | |
| | Other | | | | | | | | | | | | | | | | |
| UUP | US Dollar vs Int'l Basket | -1.1% | -2.9% | -1.3% | 11.4% | 7.0% | 3.2% | -9.1% | 7.1% | 4.1% | -6.7% | 5.7% | 9.5% | 2.7% | 35.7% | 2.4% | |
| I:BTCUSD | Bitcoin (as of 7/13/2014) | | | | -46.0% | 37.8% | 129.4% | 1250.6% | -71.1% | 85.3% | 308.8% | 60.6% | -64.8% | 158.3% | 7251.8% | 57.0% | |
| | Highest Return | 34.0% | 43.0% | 43.3% | 30.4% | 37.8% | 129.4% | 1250.6% | 7.1% | 85.3% | 308.8% | 60.6% | 33.8% | 158.3% | | | |
| | Lowest Return | -23.7% | -3.2% | -28.3% | -46.0% | -35.9% | -3.1% | -9.1% | -71.1% | -1.2% | -25.9% | -9.7% | -64.8% | -5.1% | | | |