

YCHARTS

Monthly Market Wrap

September 2025

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Released October 2, 2025

The Effect of Missing the Best Market Days



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Asset Class Performance

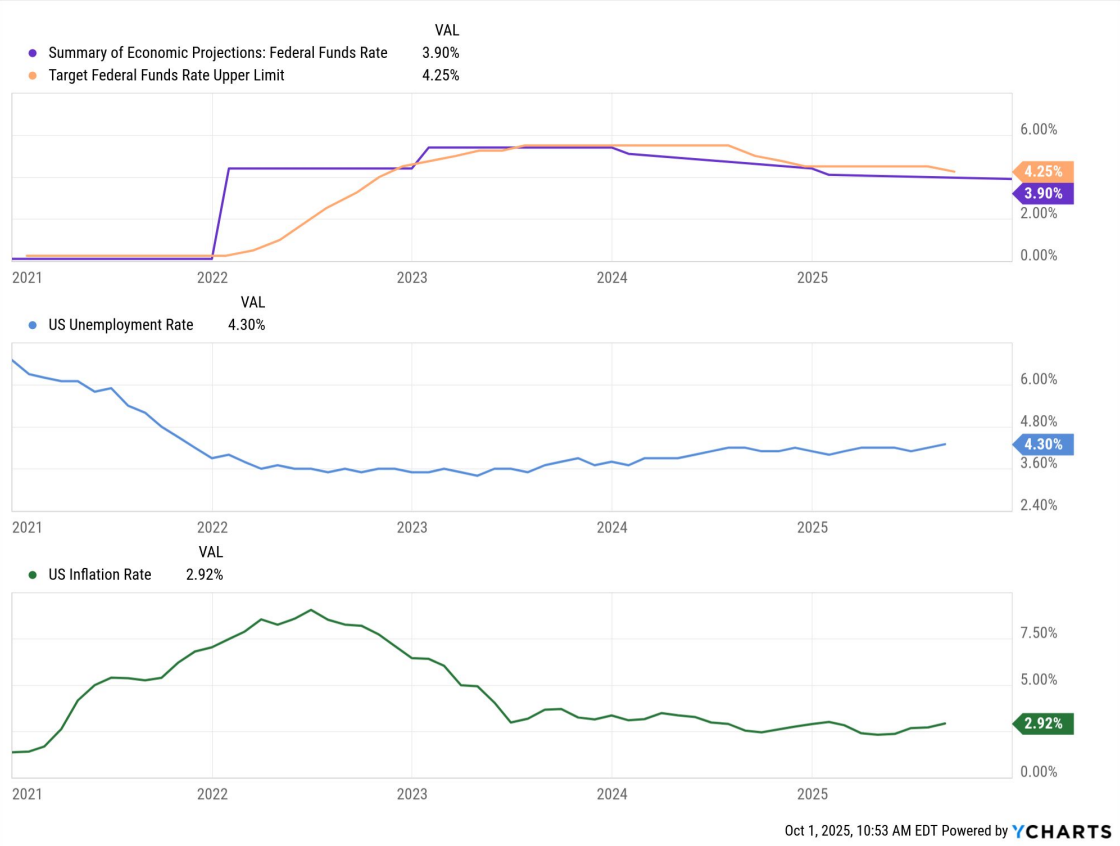
YTD Total Return	1 month Total Return	3 month Total Return	6 month Total Return	1 year Total Return	3 year Total Return	5 year Total Return	10 year Total Return
Emerging Markets 28.2%	Emerging Markets 7.2%	US Small 12.4%	US Growth 30.2%	US Growth 25.5%	US Growth 31.6%	US Growth 17.6%	US Growth 18.8%
World exUSA 25.9%	US Growth 5.3%	Emerging Markets 10.9%	Emerging Markets 24.5%	Emerging Markets 18.2%	S&P 500 24.9%	Commodities 17.6%	S&P 500 15.3%
US Growth 17.2%	S&P 500 3.7%	US Growth 10.5%	US Small 21.9%	S&P 500 17.6%	World exUSA 22.3%	S&P 500 16.5%	US Value 10.7%
S&P 500 14.8%	US Small 3.1%	S&P 500 8.1%	S&P 500 20.0%	World exUSA 16.7%	Emerging Markets 18.8%	US Value 13.9%	US Small 9.8%
US Value 11.7%	Muni Bonds 2.3%	World exUSA 5.4%	World exUSA 18.4%	US Small 10.8%	US Value 17.0%	World exUSA 12.2%	World exUSA 9.0%
US Small 10.4%	World exUSA 2.2%	US Value 5.3%	US Value 9.3%	Commodities 10.1%	US Small 15.2%	US Small 11.6%	Emerging Markets 8.4%
US Real Estate 6.2%	US Value 1.5%	Commodities 4.1%	Aggregate Bonds 3.3%	US Value 9.4%	US Real Estate 9.3%	Emerging Markets 7.5%	US Real Estate 6.8%
Aggregate Bonds 6.1%	Aggregate Bonds 1.1%	US Real Estate 3.1%	Muni Bonds 2.9%	Aggregate Bonds 2.9%	Aggregate Bonds 4.9%	US Real Estate 7.0%	Commodities 4.1%
Commodities 6.1%	US Treasuries 0.8%	Muni Bonds 3.0%	US Real Estate 2.7%	US Treasuries 2.1%	Muni Bonds 4.7%	Muni Bonds 0.9%	Muni Bonds 2.3%
US Treasuries 5.4%	Commodities 0.6%	Aggregate Bonds 2.0%	US Treasuries 2.4%	Muni Bonds 1.4%	Commodities 4.7%	Aggregate Bonds -0.4%	Aggregate Bonds 1.8%
Muni Bonds 2.6%	US Real Estate 0.1%	US Treasuries 1.5%	Commodities 1.1%	US Real Estate -2.0%	US Treasuries 3.6%	US Treasuries -1.3%	US Treasuries 1.2%

Past performance is no guarantee of future results. You cannot invest directly in an index.

*Data as of 9/30/2025

Asset	Index
US Real Estate	Dow Jones US Real Estate Index Total Return
US Growth Stocks	Russell 1000 Growth Total Return
Commodities	S&P GSCI Total Return
US Small Cap	Russell 2000 Total Return
S&P 500	S&P 500 Total Return
US Value Stocks	Russell 1000 Value Total Return
World ex USA	MSCI World Ex USA Total Return
Emerging Markets	MSCI Emerging Markets Total Return
Aggregate Bonds	Barclays US Aggregate Total Return
Muni Bonds	Barclays Municipal Bond Total Return
US Treasuries	Barclays US Treasury Total Return

Off the YCharts! Fed Rate Cuts Take Effect



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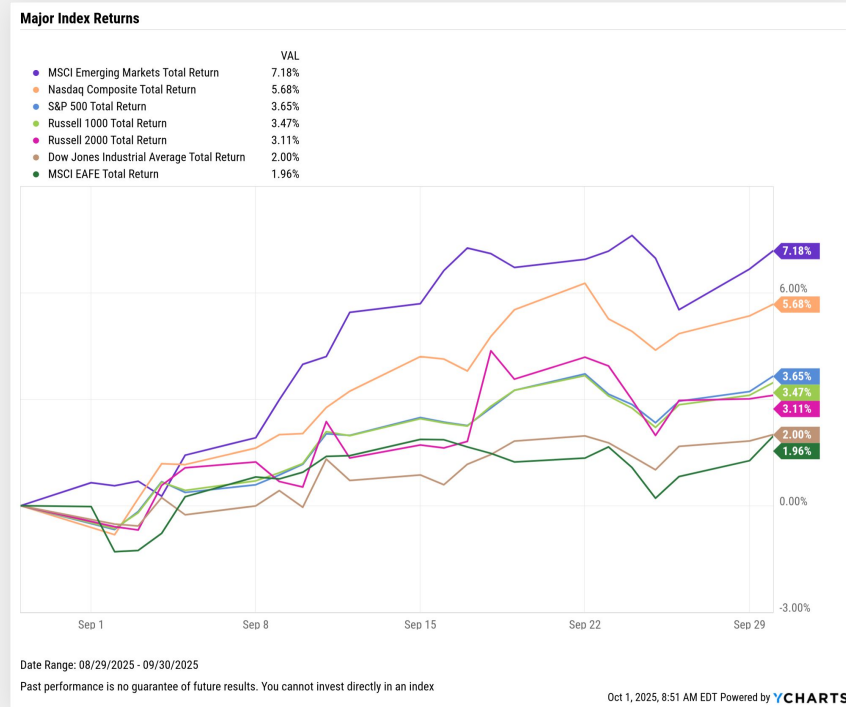
Equity Performance

Charts and tables highlighting the performance of stock market indices, sectors, and individual securities

Key Stock Market Index Performance

September 2025:

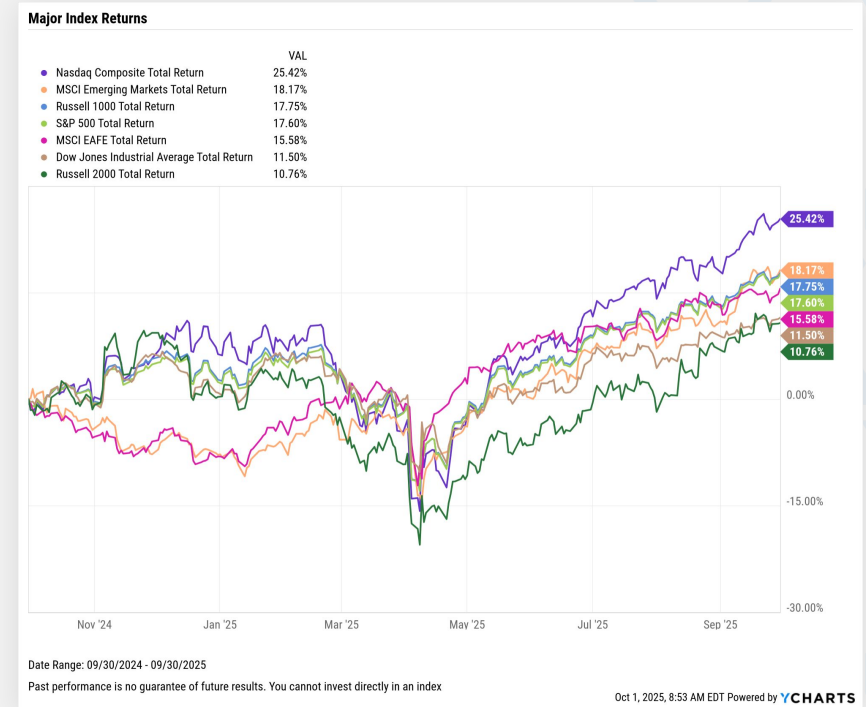
All indices positive, led by emerging markets up 7.2%



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Trailing Twelve Months (TTM):

Nasdaq up 25%, all indices positive by over 10% TTM



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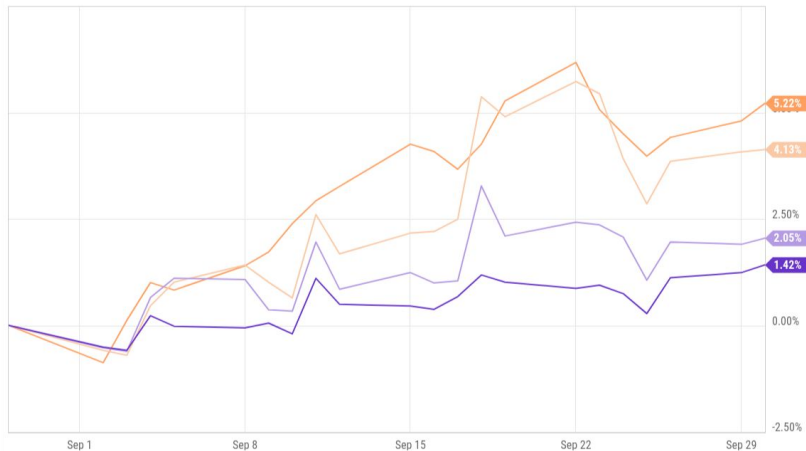
Value vs. Growth Performance

September 2025:

Large-cap Growth soars for second straight month, all equity styles positive

Value vs. Growth Performance

	VAL
• iShares Russell 1000 Growth (IWF) Total Return	5.22%
• iShares Russell 2000 Growth ETF (IWO) Total Return	4.13%
• iShares Russell 2000 Value ETF (IWN) Total Return	2.05%
• iShares Russell 1000 Value ETF (IWD) Total Return	1.42%



Date Range: 08/29/2025 - 09/30/2025

For informational purposes only. Past performance is no guarantee of future results

Oct 1, 2025, 11:57 AM EDT Powered by YCHARTS

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Trailing Twelve Months (TTM):

Large-cap Growth leads with 25.3% gain, Small-cap Growth remains second

Value vs. Growth Performance

	VAL
• iShares Russell 1000 Growth (IWF) Total Return	25.28%
• iShares Russell 2000 Growth ETF (IWO) Total Return	13.51%
• iShares Russell 1000 Value ETF (IWD) Total Return	9.25%
• iShares Russell 2000 Value ETF (IWN) Total Return	7.85%



Date Range: 09/30/2024 - 09/30/2025

For informational purposes only. Past performance is no guarantee of future results

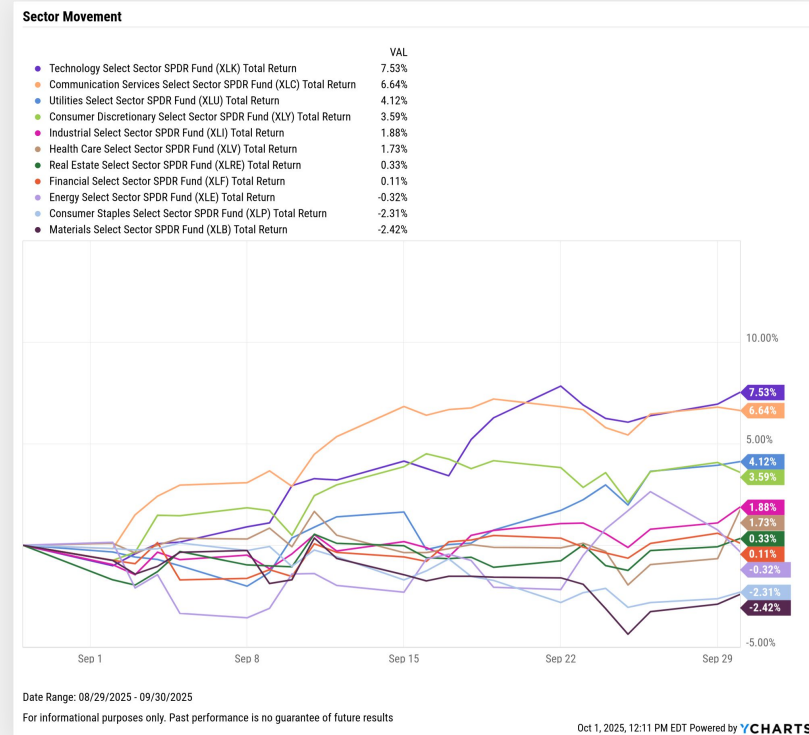
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Domestic Sector Performance

September 2025:

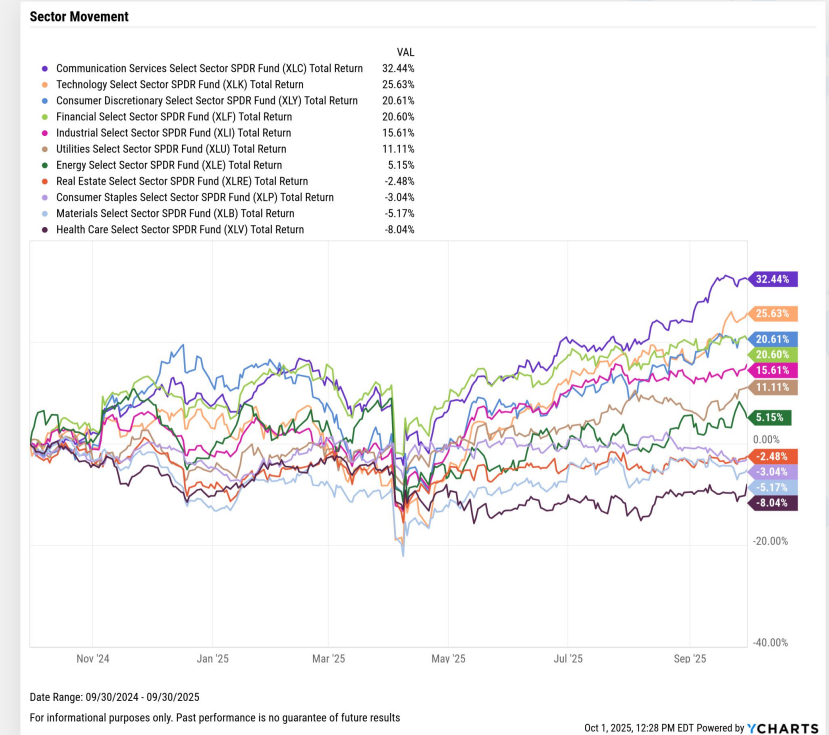
Technology leads all sectors up 7.5%; Materials lag



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Trailing Twelve Months (TTM):

Four sectors up 20% or more TTM, Health Care down 8%



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Best-Performing S&P 500 Stocks of the Month

Ticker	Name	Sep Price Returns	2025 Price Returns	Industry	Sector
WBD	Warner Bros. Discovery, Inc.	▲ 67.8%	▲ 84.8%	Entertainment	Communication Services
APP	Applovin Corp.	▲ 50.1%	▲ 121.9%	Software	Information Technology
WDC	Western Digital Corp.	▲ 49.4%	▲ 166.5%	Semiconductors & Semi Equipment	Information Technology
STX	Seagate Technology Holdings	▲ 41.0%	▲ 173.5%	Semiconductors & Semi Equipment	Information Technology
MU	Micron Technology, Inc.	▲ 40.6%	▲ 98.8%	Semiconductors & Semi Equipment	Information Technology
INTC	Intel Corp.	▲ 37.8%	▲ 67.3%	Semiconductors & Semi Equipment	Information Technology
HOOD	Robinhood Markets, Inc.	▲ 37.6%	▲ 284.3%	Capital Markets	Financials
LRCX	Lam Research Corp.	▲ 33.7%	▲ 85.4%	Semiconductors & Semi Equipment	Information Technology
TSLA	Tesla, Inc.	▲ 33.2%	▲ 10.1%	Automobiles	Consumer Discretionary
PSKY	Paramount Skydance Corp.	▲ 28.7%	▲ 80.9%	Media	Communication Services

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Worst-Performing S&P 500 Stocks of the Month

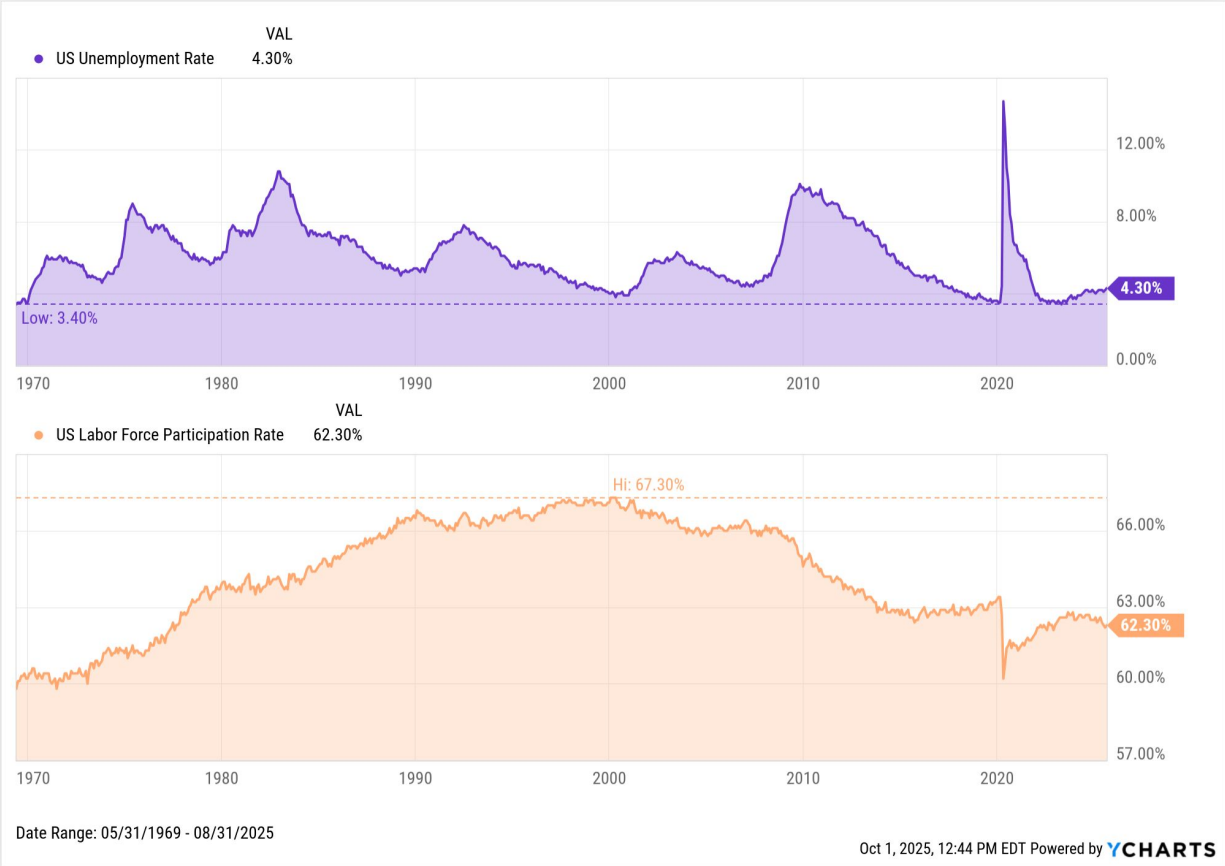
Ticker	Name	Sep Price Returns	2025 Price Returns	Industry	Sector
KMX	CarMax, Inc.	▼ -26.9%	▼ -45.1%	Specialty Retail	Communication Services
FDS	FactSet Research Systems, Inc.	▼ -23.3%	▼ -40.3%	Capital Markets	Information Technology
KVUE	Kenvue, Inc.	▼ -21.6%	▼ -24.0%	Personal Care Products	Information Technology
SNPS	Synopsys, Inc.	▼ -18.2%	▲ 1.7%	Software	Information Technology
STZ	Constellation Brands, Inc.	▼ -16.8%	▼ -39.1%	Beverages	Financials
DECK	Deckers Outdoor Corp.	▼ -15.3%	▼ -50.1%	Textiles, Apparel & Luxury Goods	Health Care
EPAM	EPAM Systems, Inc.	▼ -14.5%	▼ -35.5%	IT Services	Information Technology
HUM	Humana, Inc.	▼ -14.3%	▲ 2.5%	Health Care Providers & Services	Health Care
DLTR	Dollar Tree, Inc.	▼ -13.6%	▲ 25.9%	Consumer Staples Distribution & Retail	Industrials
LYB	LyondellBasell Industries NV	▼ -13.0%	▼ -34.0%	Chemicals	Utilities

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Economic Data

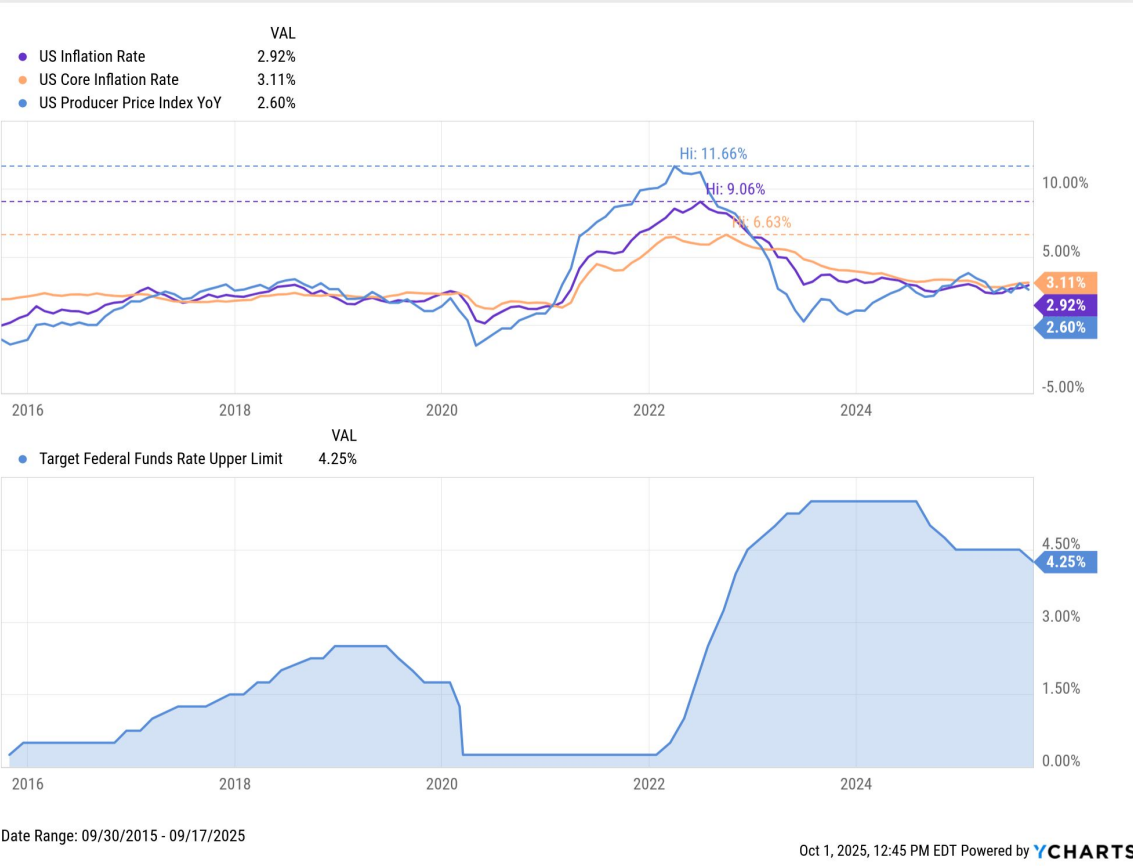
Select charts and data highlighting the major economic events of the past month

Employment



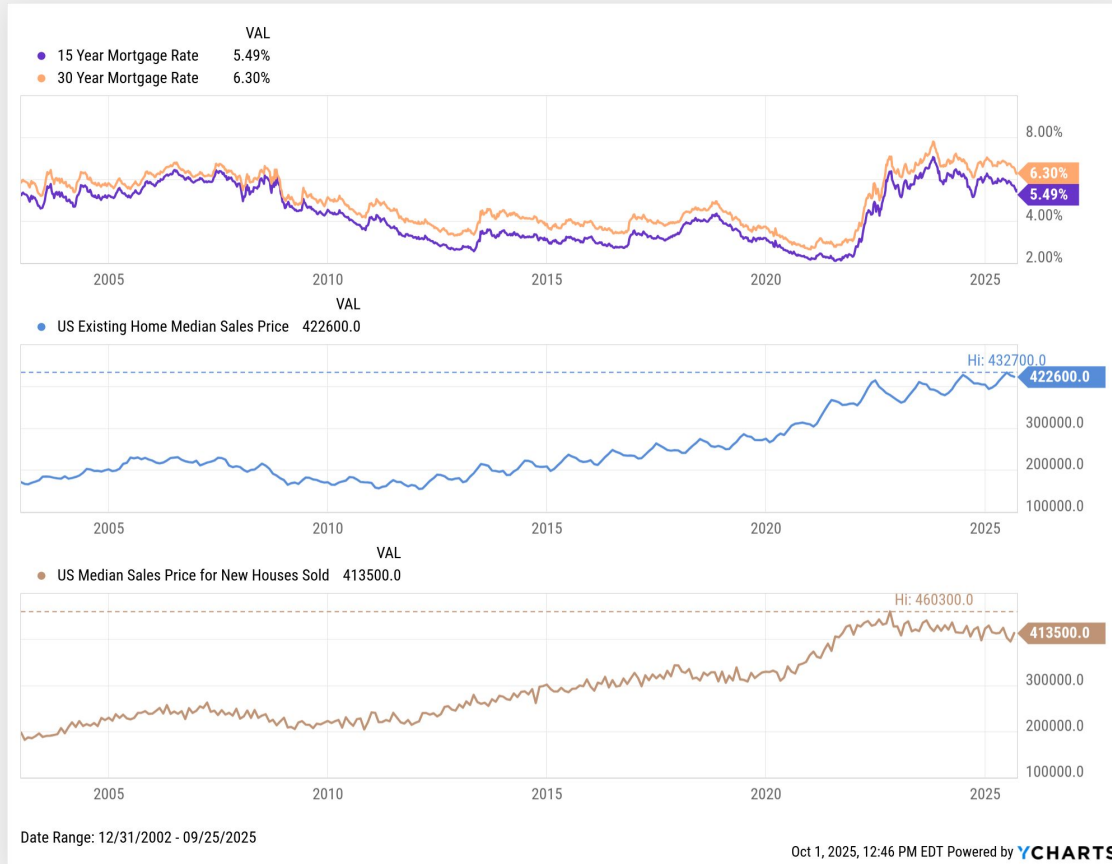
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Inflation vs. Fed Funds Rate



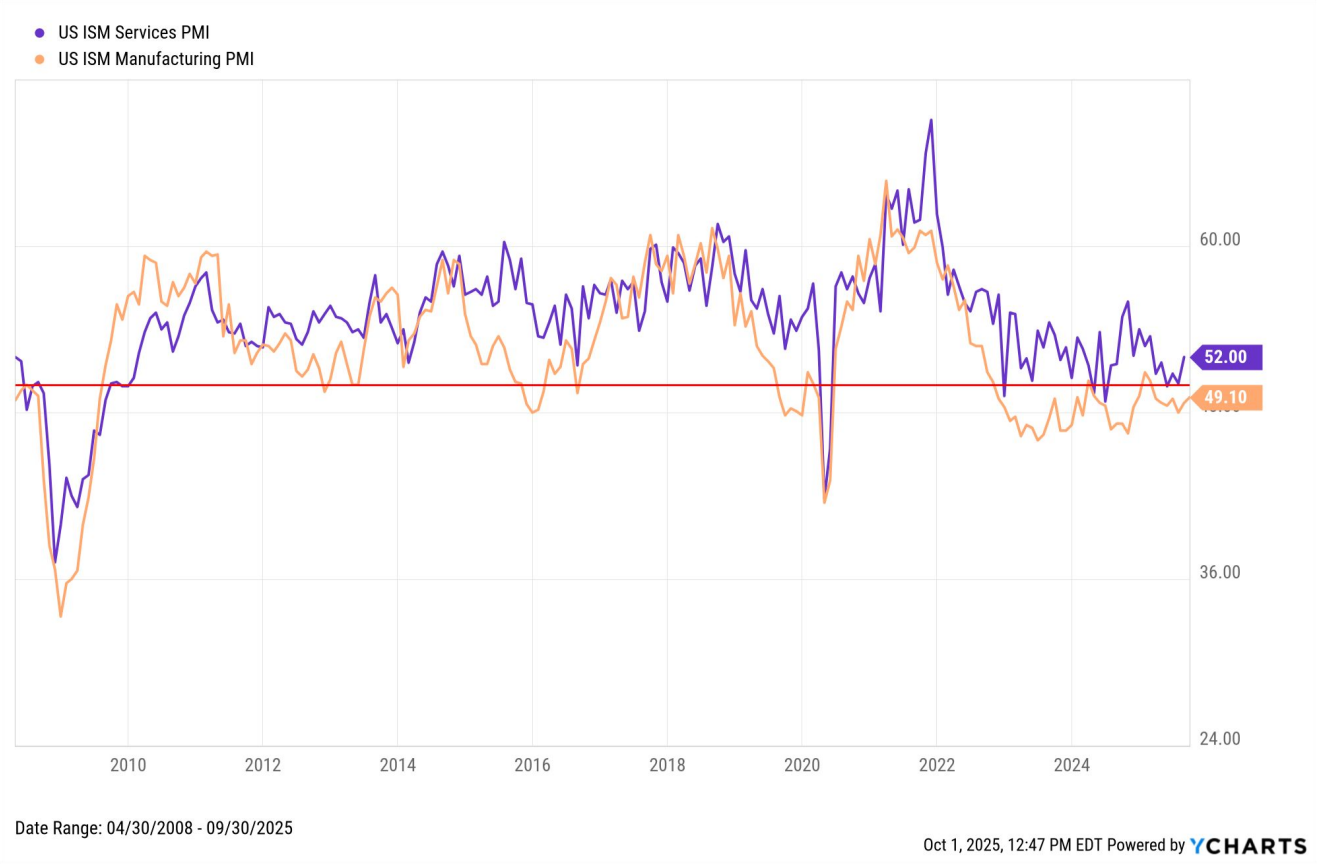
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Housing Prices and Mortgage Rates



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Services Sector Sizeable Move Into Expansion Territory



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A 12% Month Pushes Gold to New ATHs



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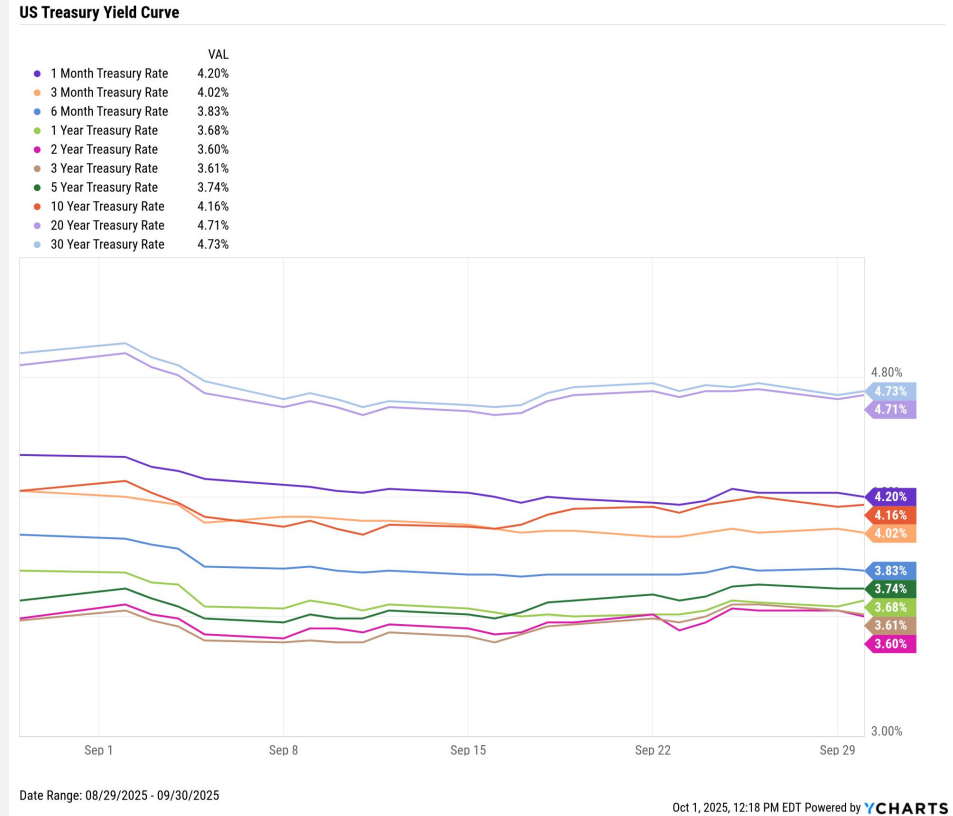
Fixed Income

Featuring the US Treasury Yield Curve, plus performance of select bond ETFs

US Treasury Yield Curve

Duration	Rate	MoM Δ
1-Month	4.20%	▼ 21 bps
3-Month	4.02%	▼ 21 bps
6-Month	3.83%	▼ 18 bps
1-Year	3.68%	▼ 15 bps
2-Year	3.60%	▲ 1 bps
3-Year	3.61%	▲ 3 bps
5-Year	3.74%	▲ 6 bps
10-Year	4.16%	▼ 7 bps
20-Year	4.71%	▼ 15 bps
30-Year	4.73%	▼ 19 bps

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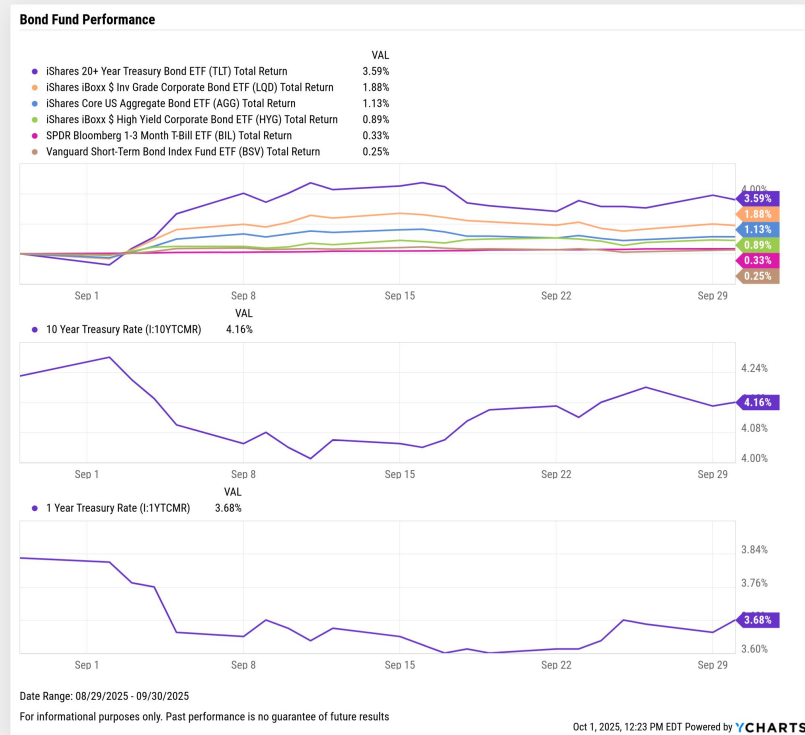


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Bond Fund Performance

September 2025:

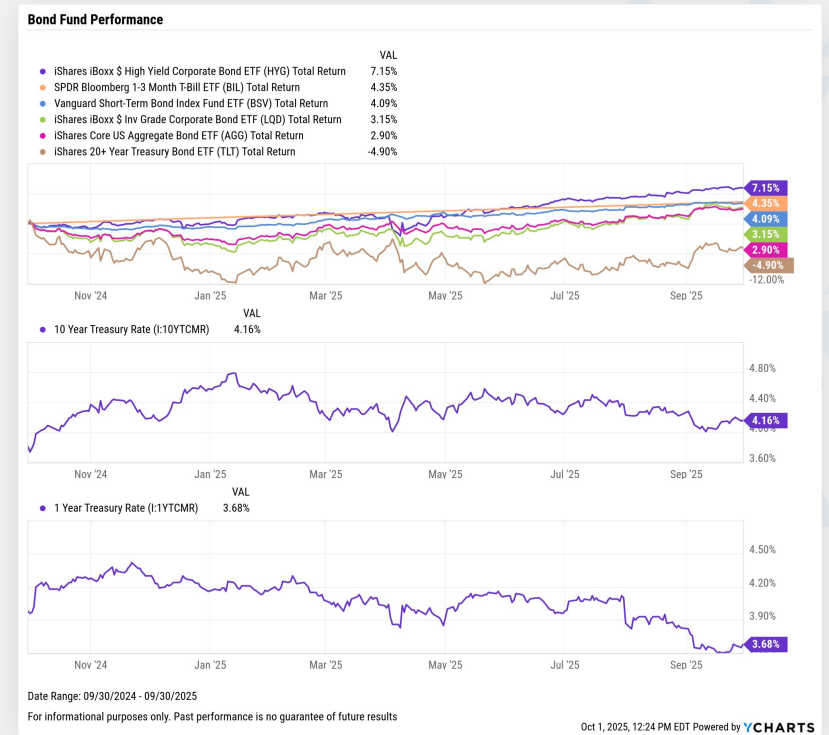
Yields decrease across the curve-ends, TLT up 3.6%



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Trailing Twelve Months (TTM):

High-yield corporate bond up 7.1% TTM; TLT down 4.9%



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