

Stock Index Performance

Index	Week	YTD	12-mo.	2025	5-yr.
Dow Jones Industrial Avg. (51,032)	0.91%	6.86%	22.92%	14.92%	10.19%
S&P 500 (7,580)	1.44%	11.27%	29.78%	17.88%	14.15%
NASDAQ 100 (30,333)	2.89%	20.45%	42.95%	21.02%	18.17%
S&P 500 Growth	2.66%	14.02%	35.95%	22.18%	16.26%
S&P 500 Value	-0.03%	7.98%	22.82%	13.19%	11.03%
S&P MidCap 400 Growth	1.94%	17.89%	30.21%	7.46%	8.40%
S&P MidCap 400 Value	0.88%	8.55%	20.60%	7.58%	7.66%
S&P SmallCap 600 Growth	0.78%	15.93%	28.32%	5.37%	5.76%
S&P SmallCap 600 Value	0.93%	15.08%	37.91%	6.70%	6.09%
Russell 2000	1.77%	18.15%	42.53%	12.81%	6.61%
MSCI EAFE	1.07%	9.37%	22.85%	31.22%	8.72%
MSCI World (ex US)	2.01%	14.36%	32.43%	32.39%	8.80%
MSCI World	1.35%	10.49%	27.53%	21.09%	11.94%
MSCI Emerging Markets	3.96%	25.61%	52.64%	33.57%	7.79%
S&P GSCI	-5.01%	37.66%	50.32%	7.12%	16.70%

Source: Bloomberg. Returns are total returns. **5-yr. return is an average annual.** One-week, YTD, 12-mo. and 5-yr. performance returns calculated through 5/29/26. An index cannot be purchased directly by investors. Past performance is no guarantee of future results.

S&P Sector Performance

Index	Week	YTD	12-mo.	2025	5-yr.
Communication Services	-0.01%	9.31%	41.64%	33.55%	14.88%
Consumer Discretionary	1.51%	4.11%	16.73%	6.04%	8.58%
Consumer Staples	-3.23%	7.49%	4.19%	3.90%	7.64%
Energy	-5.43%	26.04%	41.54%	8.67%	21.34%
Financials	-0.69%	-5.32%	3.10%	15.02%	8.26%
Health Care	-0.22%	-2.96%	15.06%	14.60%	5.67%
Industrials	0.82%	11.99%	23.06%	19.42%	12.29%
Information Technology	4.56%	23.81%	55.37%	24.04%	24.64%
Materials	1.27%	11.94%	19.63%	10.54%	5.15%
Real Estate	-1.34%	10.59%	10.55%	3.15%	4.04%
Utilities	-2.04%	4.84%	12.76%	16.04%	9.77%

Source: Bloomberg. Returns are total returns. **5-yr. return is an average annual.** One-week, YTD, 12-mo. and 5-yr. performance returns calculated through 5/29/26. An index cannot be purchased directly by investors. Past performance is no guarantee of future results. On 9/28/18, the Global Industry Classification Standard (GICS) was reconstituted and the Telecommunications Services sector was renamed Communication Services. GICS sector information for periods prior to 9/28/18 may not necessarily be comparable to the reconstituted sectors.

Bond Index Performance

Index	Week	YTD	12-mo.	2025	5-yr.
U.S. Treasury: Intermediate	0.55%	0.14%	3.75%	6.51%	0.86%
GNMA 30 Year	0.81%	1.03%	6.95%	8.07%	0.62%
U.S. Aggregate	0.83%	0.38%	5.35%	7.30%	0.17%
U.S. Corporate High Yield	0.55%	1.68%	7.58%	8.62%	4.39%
U.S. Corporate Investment Grade	0.97%	0.67%	6.29%	7.77%	0.63%
Municipal Bond: Long Bond (22+)	1.59%	2.20%	8.17%	1.95%	-0.20%
Global Aggregate	1.00%	0.50%	3.40%	8.17%	-1.54%

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Key Rates

Fed Funds	3.50% - 3.75%	2-yr T-Note	4.00%
CPI - Headline	3.80%	5-yr T-Note	4.14%
CPI - Core	2.80%	10-yr T-Note	4.44%
Money Market Accts.	0.45%	30-yr T-Bond	4.97%
1-yr CD	1.97%	30-yr Fixed Mortgage	6.60%
3-yr CD	1.66%	Prime Rate	6.75%
5-yr CD	1.71%	Bond Buyer 40	4.63%

Sources: Bankrate.com, Federal Reserve Bank NY, & US Bureau of Labor Statistics. Prime rate as of 5/26/26. All other data as of 5/29/26. National average banking rates are displayed for the Money Market Accts, 1-yr CD, 3-yr CD and 5-yr CD.

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Market Indicators

Investment Grade Spread (A2)	88 bps
ICE BofA US High Yield Constrained Index Spread	272 bps

Source: Bloomberg. As of 5/29/26.

Weekly Fund Flows

Estimated Flows to Long-Term Mutual Funds for the Week Ended 5/20/26

	Current Week	Previous
Domestic Equity	-\$11.749 Billion	\$10.863 Billion
Foreign Equity	-\$1.534 Billion	\$2.502 Billion
Taxable Bond	\$26.290 Billion	\$22.102 Billion
Municipal Bond	\$3.374 Billion	\$2.958 Billion

Change in Money Market Fund Assets for the Week Ended 5/27/26

	Current Week	Previous
Retail	\$4.03 Billion	\$4.04 Billion
Institutional	\$9.36 Billion	\$12.84 Billion

Source: Investment Company Institute.

Factoids for the Week of May 25th, 2026

Monday, May 25, 2026

Holiday – No Factoid

Tuesday, May 26, 2026

The Federal Bureau of Investigation's (FBI) Internet Crime Complaint Center reported that it received more than 22,000 complaints of AI-related scams in 2025, accounting for total losses of nearly \$893 million, according to *The Wall Street Journal*. This is the first year the FBI has separately reported AI-related cybercrime. Cybercriminals are shifting their target groups rapidly. Reports of cybercrime (all cybercrime, including AI-related) among people aged 19 years or younger surged by 74% year-over-year in 2025.

Wednesday, May 27, 2026

CommercialCafe reported that the U.S. industrial vacancy rate stood at 9.1% in April 2026, an increase of 30 basis points year-over-year. Average national in-place rents for industrial space increased by 5.3% year-over-year to \$9.08 per square foot during the month. At 16.1% and 5.1%, respectively, California's Central Valley region and Kansas City had the highest and lowest industrial vacancy rates in April.

Thursday, May 28, 2026

Fidelity Investments reported that the average 401(k) balance for accounts it services stood at \$141,000 in Q1'26, an increase of 11% year-over-year. The average value of assets held in individual retirement accounts increased by 7% over the period to \$131,380. Higher savings rates and equity market performance contributed to the increase in 401(k) account balances. Fidelity noted that the average 401(k) savings rate stood at a record 14.4% in Q1'26.

Friday, May 29, 2026

A record 274 climbers summited Mount Everest via the southern face of its peak on 5/20/26, according to the Associated Press. Earlier that week, Kami Rita Sherpa scaled the peak for the 32nd time, breaking his own record, while Pasang Dawa Sherpa, who has the second highest number of summits, scaled the peak for the 30th time.