

Stock Index Performance

Index	Week	YTD	12-mo.	2025	5-yr.
Dow Jones Industrial Avg (52,573)	-1.56%	10.64%	15.88%	14.92%	10.79%
S&P 500 (7,657)	-0.78%	12.77%	17.61%	17.88%	13.03%
NASDAQ 100 (29,368)	-0.58%	16.84%	23.20%	21.02%	14.61%
S&P 500 Growth	-0.90%	13.40%	17.90%	22.18%	13.33%
S&P 500 Value	-0.63%	11.98%	17.24%	13.19%	11.93%
S&P MidCap 400 Growth	-1.76%	15.40%	15.17%	7.46%	7.53%
S&P MidCap 400 Value	-1.94%	11.27%	11.71%	7.58%	9.03%
S&P SmallCap 600 Growth	-2.25%	18.51%	17.83%	5.37%	5.90%
S&P SmallCap 600 Value	-2.10%	19.19%	22.36%	6.70%	8.34%
Russell 2000	-2.38%	17.95%	21.41%	12.81%	6.91%
MSCI EAFE	-1.38%	12.51%	18.59%	31.22%	8.85%
MSCI World (ex US)	-1.09%	16.16%	23.60%	32.39%	9.03%
MSCI World	-0.98%	12.46%	17.46%	21.09%	11.21%
MSCI Emerging Markets	-0.23%	24.32%	33.90%	33.57%	8.20%
S&P GSCI	4.29%	58.67%	61.83%	7.12%	19.02%

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 9/11/26. 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	1.06%	2.45%	9.71%	33.55%	11.20%
Consumer Discretionary	-1.21%	-2.53%	-1.06%	6.04%	5.89%
Consumer Staples	-0.62%	8.36%	6.10%	3.90%	7.09%
Energy	2.06%	47.43%	51.19%	8.67%	27.07%
Financials	-1.50%	5.48%	7.62%	15.02%	10.76%
Health Care	-3.54%	7.84%	20.58%	14.60%	6.22%
Industrials	-1.64%	11.80%	14.36%	19.42%	12.86%
Information Technology	-0.17%	23.65%	30.78%	24.04%	21.50%
Materials	-2.70%	12.86%	10.88%	10.54%	6.05%
Real Estate	-1.03%	10.53%	7.30%	3.15%	2.24%
Utilities	-1.60%	0.66%	2.52%	16.04%	7.62%

Source: FTSE Russell, MSCI, Nasdaq, S&P. Returns are total returns. 5-yr. return is an average annual. One-week, YTD, 12-mo. and 5-yr. performance returns calculated through 9/11/26. 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	-0.74%	-0.77%	0.11%	6.51%	0.59%
GNMA 30 Year	-1.45%	-1.07%	0.05%	8.07%	0.16%
U.S. Aggregate	-1.04%	-1.43%	-0.73%	7.30%	-0.50%
U.S. Corporate High Yield	-0.54%	2.01%	3.54%	8.62%	3.93%
U.S. Corporate Investment Grade	-0.93%	-1.52%	-1.09%	7.77%	-0.35%
Municipal Bond: Long Bond (22+)	-1.63%	-1.60%	0.08%	1.95%	-1.13%
Global Aggregate	-0.77%	-0.90%	-0.93%	8.17%	-1.87%

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 9/11/26. An index cannot be purchased directly by investors. Past performance is no guarantee of future results.

Key Rates

Fed Funds	3.50% - 3.75%	2-yr T-Note	4.63%
CPI - Headline	3.40%	5-yr T-Note	4.78%
CPI - Core	2.40%	10-yr T-Note	4.97%
Money Market Accts.	0.45%	30-yr T-Bond	5.35%
1-yr CD	2.05%	30-yr Fixed Mortgage	6.88%
3-yr CD	1.70%	Prime Rate	6.75%
5-yr CD	1.75%	Bond Buyer 40	5.09%

Sources: Bankrate.com, Federal Reserve Bank NY, & US Bureau of Labor

Statistics. Prime rate as of 9/8/26. All other data as of 9/11/26. 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)	97 bps
ICE BofA US High Yield Constrained Index Spread	265 bps

Source: Intercontinental Exchange, Inc. (ICE). As of 9/11/26.

Weekly Fund Flows

Estimated Flows to Long-Term Mutual Funds for the Week Ended 9/2/26

	Current Week	Previous
Domestic Equity	-\$5.138 Billion	-\$18.344 Billion
Foreign Equity	-\$325 Million	\$2.195 Billion
Taxable Bond	\$12.922 Billion	\$10.979 Billion
Municipal Bond	-\$242 Million	\$2.483 Billion

Change in Money Market Fund Assets for the Week Ended 9/9/26

	Current Week	Previous
Retail	\$0.89 Billion	\$11.10 Billion
Institutional	-\$6.99 Billion	\$33.66 Billion

Source: Investment Company Institute.

Factoids for the Week of September 7th, 2026

Monday, August 31, 2026

No factoid - Holiday

Tuesday, September 8, 2026

S&P Global reported that 372 large U.S. corporations filed for bankruptcy protection in the first half of 2026, up slightly from 371 a year earlier, keeping filings at their highest level since 2010. Industrial companies filed the most bankruptcies (50) over the period, followed by consumer discretionary companies (35) and healthcare (26).

Wednesday, September 9, 2026

Realtor.com reported that homes listed for sale in the U.S. were on the market for a median of 60 days in August 2026, unchanged from August 2025 and in line with pre-pandemic norms. Nationally, 20.4% of listed properties had their prices cut in August, representing the highest share of cuts so far this year.

Thursday, September 10, 2026

SIFMA Research reported that the 22 banks it uses as a proxy for the U.S. financial system held total assets of \$23.6 trillion in Q2'26, up 10.5% year-over-year (YoY). Total revenue for the group increased 20.2% YoY to \$270.8 billion, while net income available to common shareholders surged 55.8% YoY to \$74.9 billion.

Friday, September 11, 2026

FactSet reported that 1,195 merger and acquisition (M&A) deals were announced in the U.S. market in July 2026, down 13.6% from 1,383 deals in the previous month. Aggregate M&A spending also declined month-over-month, falling from \$374.4 billion in June 2026 to \$202.0 billion in July 2026.