Factoids for the week of August 1-5, 2016

Monday, August 1, 2016
The price of crude oil closed at $41.60 per barrel on 7/29/16. This year’s bull market in crude oil began after its price hit a multi-year low of $26.21 on 2/11/16. The price of crude oil reached a 2016-high of $51.23 on 6/8/16, or a gain of 95.5% from the low on 2/11/16, according to Bloomberg. From 6/8/16 through 7/29/16, however, the price pulled back by 18.8%, which is close to bear market territory (price decline of 20% or more). The sell-off reduced the gain to 58.7%. The current bull market in crude oil has lasted 170 days (as of 7/29/16). Since 1983, the average bull market in crude oil has lasted 209 days, with an average price gain of 62.8%, according to Bespoke Investment Group.

Tuesday, August 2, 2016
In July, the dividend-payers (417) in the S&P 500 (equal weight) posted a total return of 3.89% vs. 6.68% for the non-payers (88), according to S&P Dow Jones Indices. There are currently 505 stocks in the index. Year-to-date, the payers were up 13.66%, vs. a gain of 6.95% for the non-payers. For the 12-month period ended July 2016, payers were up 9.55%, vs. a gain of 0.10% for the non-payers. The number of dividend increases in July totaled 31, up from 24 in July 2015. Year-to-date, there were 224 increases, down from 237 a year ago. Year-to-date, there were 11 dividend cuts, which matched the 11 cuts at this point a year ago. As of the close of July 2016, Financials contributed 16.98% of the S&P 500 Index’s dividend payout, the most of any sector. Information Technology had the second-highest contribution level at 15.42%.

Wednesday, August 3, 2016
Year-to-date through July, the FTSE NAREIT All Equity REITs Index posted a total return of 18.10%, compared to 7.66% for the S&P 500 Index, according to Morningstar. Alexander Goldfarb, managing director at Sandler O’Neil & Partners, noted that REITs are yielding 8.95% vs. 1.44% for Treasuries with a similar maturity. Year-to-date, the FTSE NAREIT All Equity REITs Index was 3.47%, compared to 2.10% for the S&P 500 Index. As of the close of July, the FTSE NAREIT All Equity REITs Index, on a price-only basis, stood at an all-time high, according to Bloomberg. Investors funneled an estimated net $4.6 billion into Real Estate mutual funds and exchange traded funds in the first half of 2016, according to Morningstar. Investors were up 21.12%, according to Morningstar. Alexander Goldfarb, managing director at Sandler O’Neil & Partners, noted that REITs are yielding 8.95% vs. 1.44% for Treasuries with a similar maturity. Year-to-date, the FTSE NAREIT All Equity REITs Index was 3.47%, compared to 2.10% for the S&P 500 Index. As of the close of July, the FTSE NAREIT All Equity REITs Index, on a price-only basis, stood at an all-time high, according to Bloomberg. Investors funneled an estimated net $4.6 billion into Real Estate mutual funds and exchange traded funds in the first half of 2016, according to Morningstar. Alexander Goldfarb, managing director at Sandler O’Neil & Partners, noted that REITs are yielding 8.95% vs. 1.44% for Treasuries with a similar maturity. Year-to-date, the FTSE NAREIT All Equity REITs Index was 3.47%, compared to 2.10% for the S&P 500 Index. As of the close of July, the FTSE NAREIT All Equity REITs Index, on a price-only basis, stood at an all-time high, according to Bloomberg. Investors funneled an estimated net $4.6 billion into Real Estate mutual funds and exchange traded funds in the first half of 2016, according to Morningstar.

Thursday, August 4, 2016
International Data Corporation’s (IDC) Worldwide Quarterly Mobile Phone Tracker reported that smartphone vendors shipped a total of 343.3 million units worldwide in Q2’16, up 0.3% from the 342.4 million units shipped in Q2’15, according to its own release. Shipments were up 3.1% from the 333.1 million registered in Q1’16.

Friday, August 5, 2016
A survey by T. Rowe Price revealed that 76% of parents are willing to delay their retirement to pay for their kids’ college education, and 68% of those polled said they would get a second or part-time job to help their kids get through college, according to its own release. Only 12% of parents believe they can pay the entire cost of college. The College Board reported that the average total cost of a four-year education at an in-state university is $80,000.