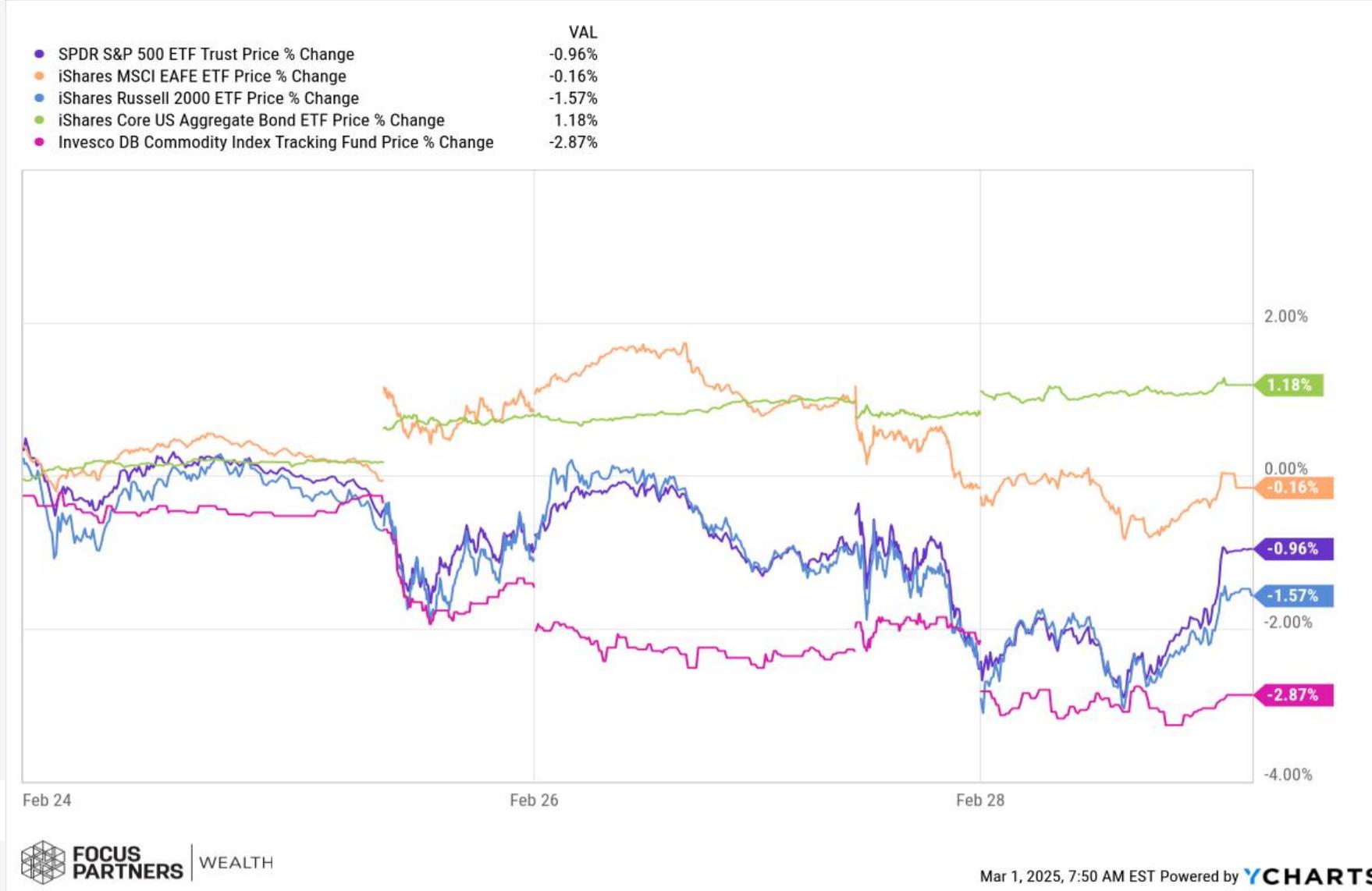


# Two-Minute Market Focus

March 1, 2025

Supporting Charts + Commentary

# Performance This Month



US Total Mkt Bonds

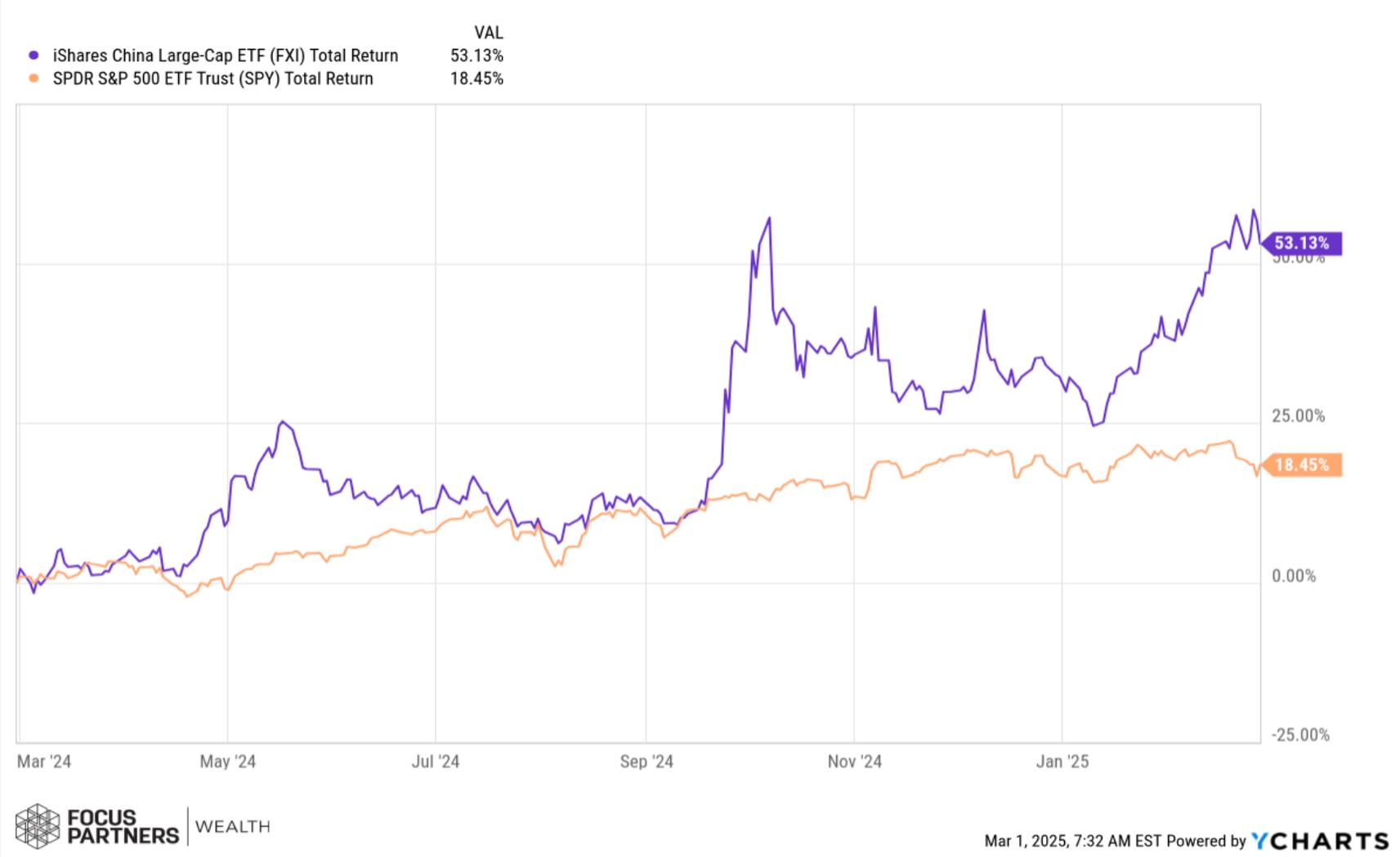
International Developed Mkt Stocks

US Large Stocks

US Small Company Stocks

Commodities

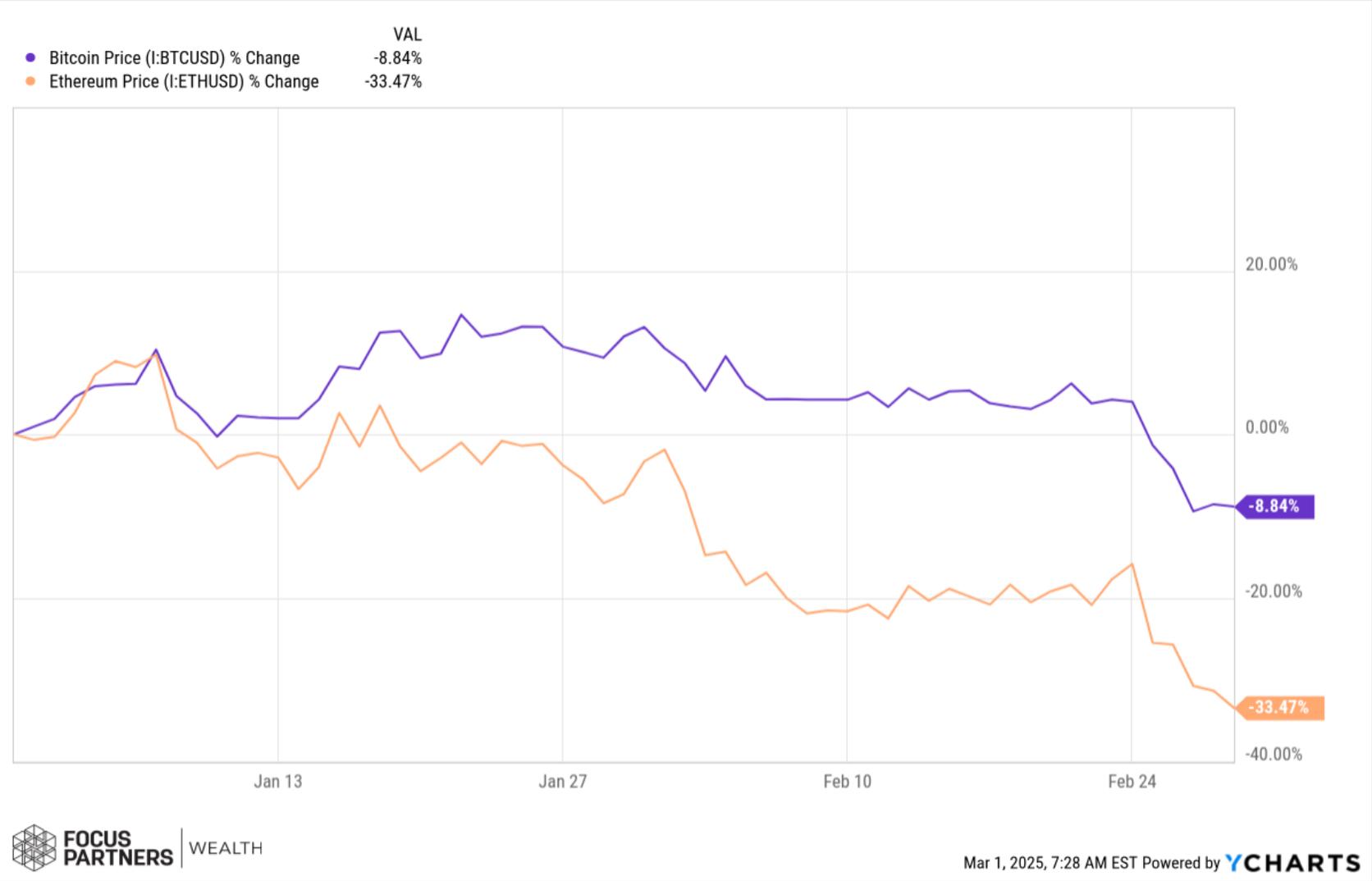
# Chart #1: Chinese Markets Have Started To Recover?



Source: Ycharts

Please see important disclosures at the end of this presentation.

# Chart #2: Digital Assets Showing Signs Of Liquidity Strain



Source: Ycharts

Please see important disclosures at the end of this presentation.

# Appendix

# Correction / Recession Indicators

Market Price Indicators		Economic Indicators		Sentiment Indicators	
Commodities Trend (50 Day Moving Average) <sup>1</sup>	<b>Rising</b>	Continued Unemployment Claims (mln) <sup>2</sup>	<b>2,171</b>	CNN Fear/Greed Index <sup>3</sup>	<b>Ex Fear</b>
S&P 500 Trend (200 Day Moving Average) <sup>1</sup>	<b>Rising</b>	GDP Nowcast (1.5-2.5% ave) <sup>5</sup>	<b>-1.5%</b>	AAll % Bulls Sentiment (39% ave) <sup>4</sup>	<b>19.4%</b>
High Yield Credit Spreads (579 bps ave) <sup>2</sup>	<b>281</b>	Case-Schiller 20 Mkt HPI (y/y) <sup>6</sup>	<b>4.37%</b>	Volatility Index (13-19 ave) <sup>1</sup>	<b>19.6</b>
BBB Credit Spreads (172 bps ave) <sup>2</sup>	<b>105</b>	US ISM Manufacturing (>50= expansion) <sup>2</sup>	<b>50.9</b>	CBOE Total Put/Call Ratio (range = 0.9 to 1.1) <sup>1</sup>	<b>0.92</b>
Yield Curve 10yr – 3M (175 bps ave) <sup>2</sup>	<b>-8</b>	US ISM Services (>50= expansion) <sup>2</sup>	<b>52.8</b>	% S&P 500 Stocks Above the 200 Day Moving Average (40-60 ave) <sup>1</sup>	<b>60%</b>
Yield Curve 10yr -2yr <sup>2</sup>	<b>25</b>	Headline Consumer Price Index (y/y) <sup>2</sup>	<b>3.00%</b>	Total Positive	<b>7 / 19</b>
NYSE Advance/Decline Line (month/month) <sup>1</sup>	<b>Advancing</b>	Leading Economic Index (m/m) <sup>2</sup>	<b>-0.3%</b>	Total Negative	<b>3 / 19</b>

Sources: (1) Stockcharts.com (!ADLINENYA, \$SPXA200R,), (2) YCharts. (3) CNN.com, (4) American Association of Individual Investors, (5) Atlanta Federal Reserve, (6) YCharts

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