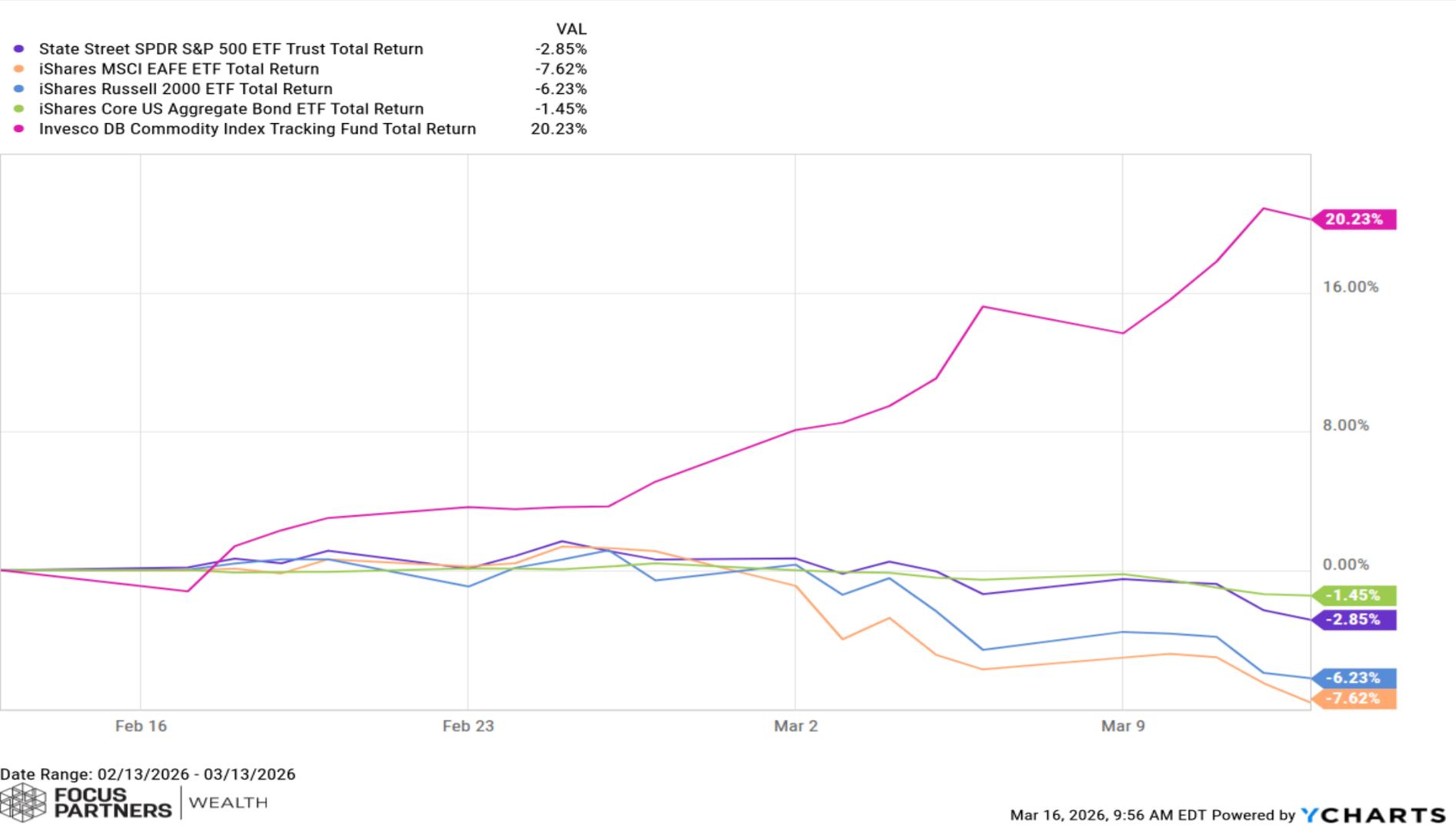


# Two-Minute Market Focus

March 16, 2026

Supporting Charts + Commentary

# 2026 Performance



Commodities

US Total Mkt Bonds

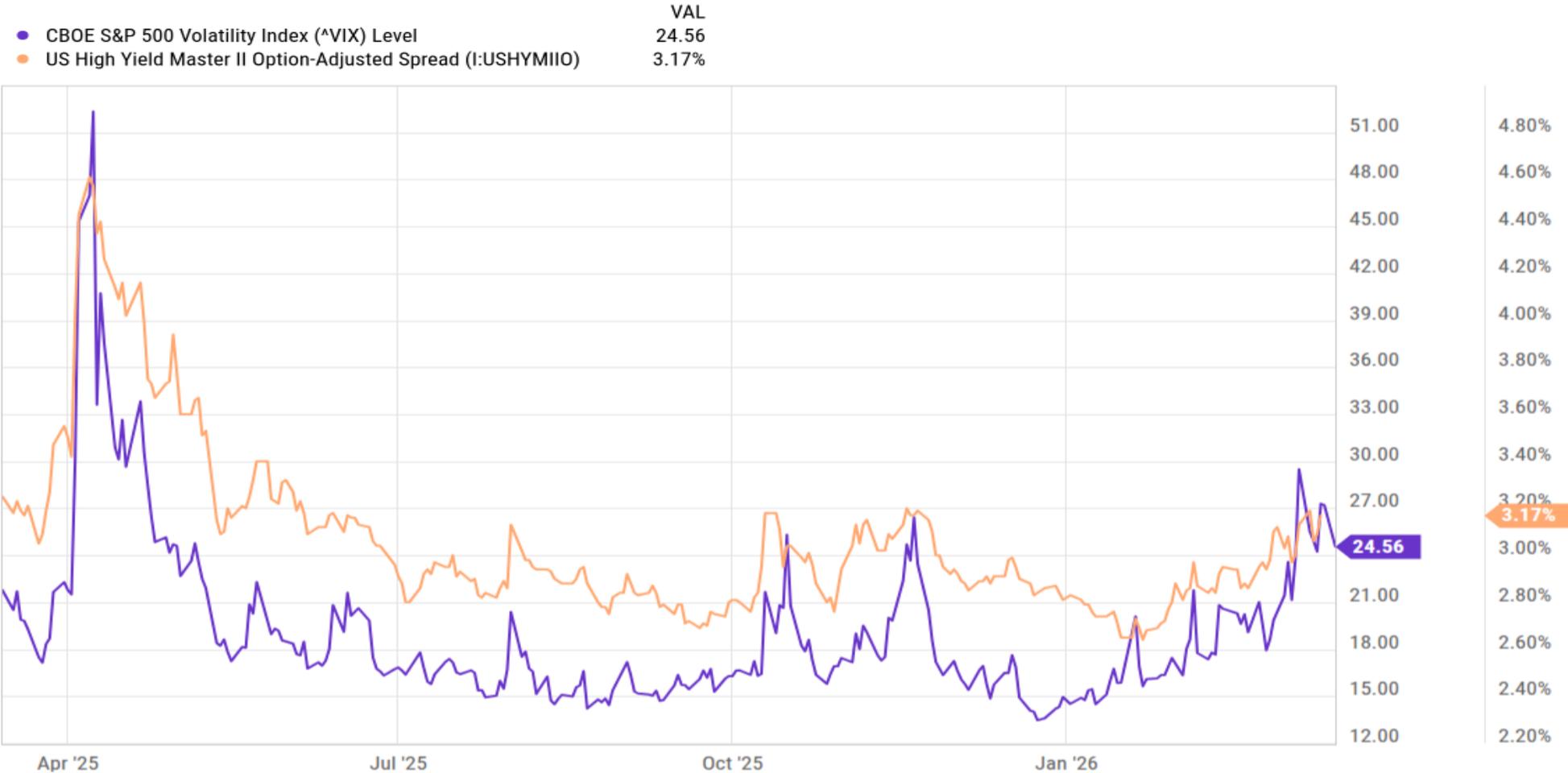
US Large Stocks

US Small Company Stocks

International Developed Mkt Stocks

Index returns are gross of fees. Past performance does not guarantee future results

# Chart #1: High Yield Credit and Volatility



Date Range: 03/14/2025 - 03/16/2026

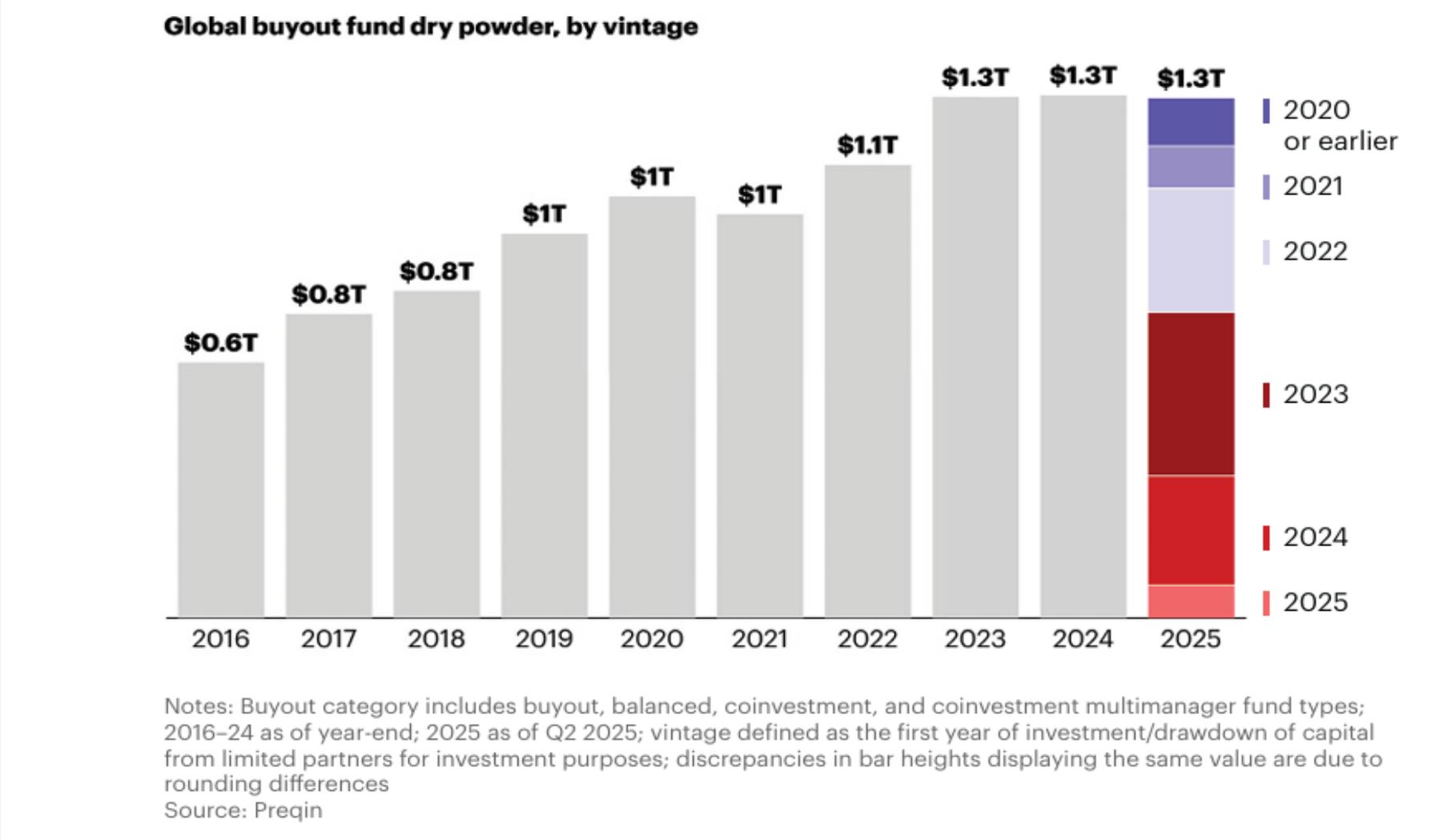


Mar 16, 2026, 9:57 AM EDT Powered by YCHARTS



Source: Ycharts as of 3/16/2026  
 Please see important disclosures at the end of this presentation

# Chart #2: Global Private Equity “Dry Powder”



# Appendix

# Correction / Recession Indicators

Market Price Indicators		Economic Indicators		Sentiment Indicators	
Commodities Trend (50 Day Moving Average) <sup>1</sup>	<b>Advancing</b>	Continued Unemployment Claims (mln) <sup>2</sup>	<b>2,151</b>	CNN Fear/Greed Index <sup>3</sup>	<b>Ext Fear</b>
S&P 500 Trend (200 Day Moving Average) <sup>1</sup>	<b>Advancing</b>	GDP Nowcast (1.5-2.5% ave) <sup>5</sup>	<b>3.0%</b>	AAll % Bulls Sentiment (39% ave) <sup>4</sup>	<b>31.9</b>
High Yield Credit Spreads (579 bps ave) <sup>2</sup>	<b>317</b>	Case-Schiller 20 Mkt HPI (y/y) <sup>6</sup>	<b>1.40%</b>	Volatility Index (13-19 ave) <sup>1</sup>	<b>24.1</b>
BBB Credit Spreads (172 bps ave) <sup>2</sup>	<b>112</b>	US ISM Manufacturing (>50= expansion) <sup>2</sup>	<b>52.4</b>	CBOE Total Put/Call Ratio (range = 0.9 to 1.1) <sup>1</sup>	<b>0.90</b>
Yield Curve 10yr – 3M (175 bps ave) <sup>2</sup>	<b>56</b>	US ISM Services (>50= expansion) <sup>2</sup>	<b>56.1</b>	% S&P 500 Stocks Above the 200 Day Moving Average (40-60 ave) <sup>1</sup>	<b>53</b>
Yield Curve 10yr -2yr <sup>2</sup>	<b>55</b>	Headline Consumer Price Index (y/y) <sup>2</sup>	<b>2.40%</b>	Total Positive	<b>7 / 19</b>
NYSE Advance/Decline Line (month/month) <sup>1</sup>	<b>Declining</b>	Leading Economic Index (m/m) <sub>2</sub>	<b>-0.1%</b>	Total Negative	<b>2 / 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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