

Two-Minute Market Focus

March 17, 2025

Supporting Charts + Commentary

Performance This Month

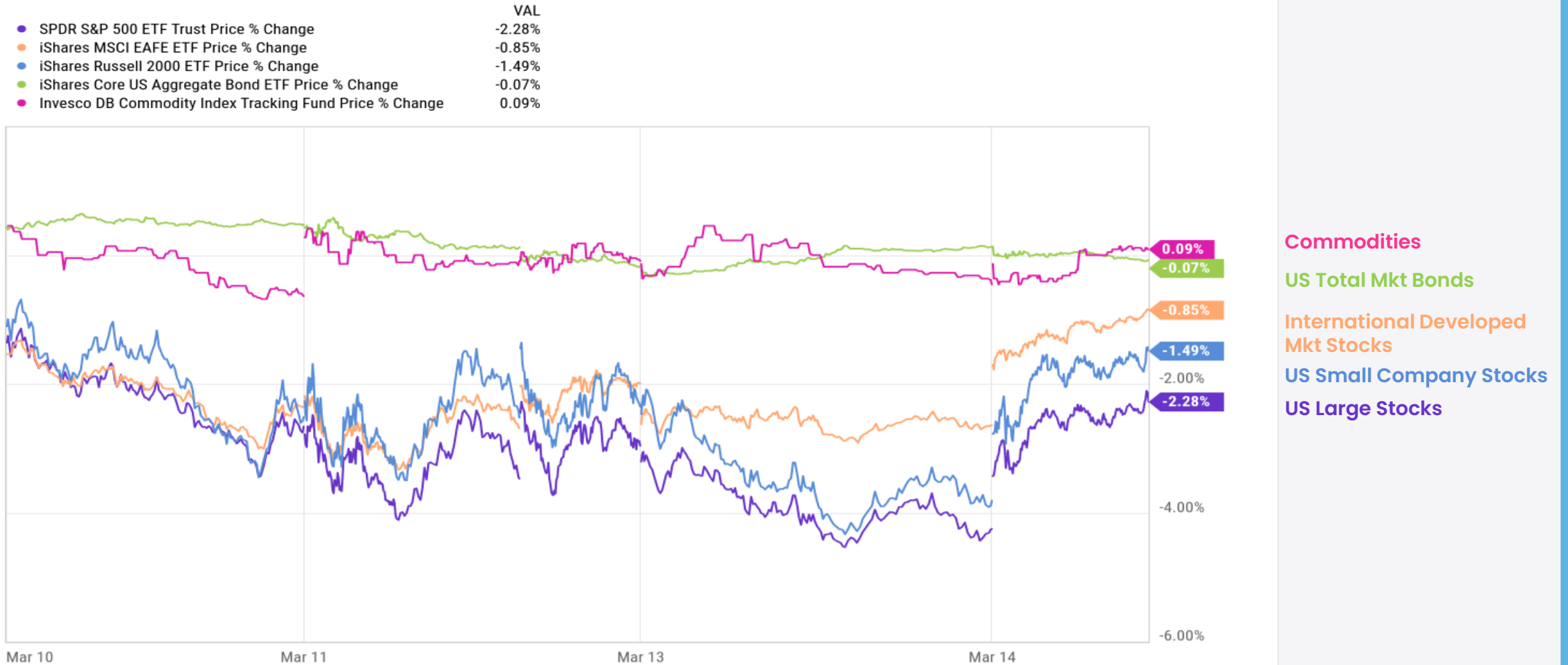
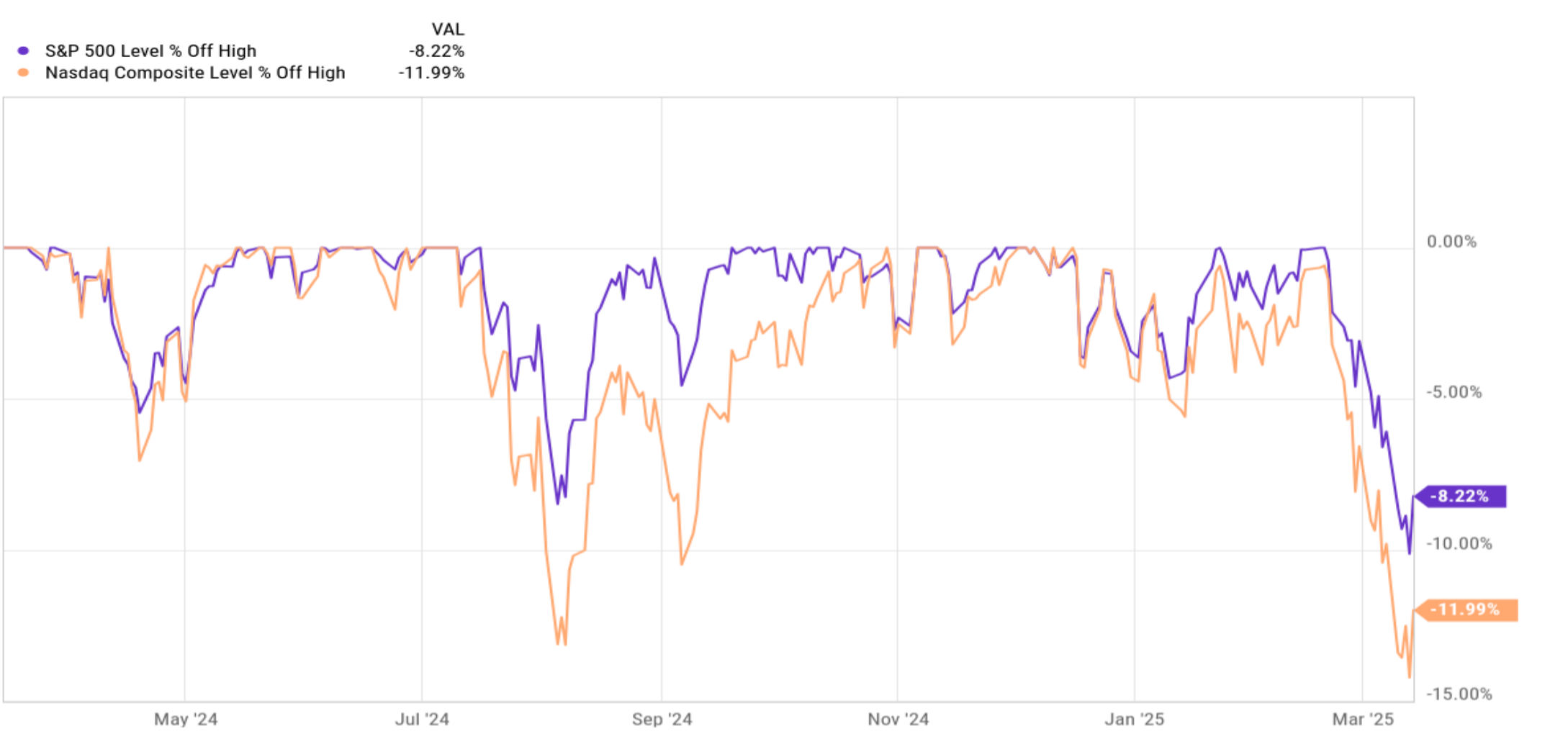


Chart #1: US Stocks And The Current Drawdown



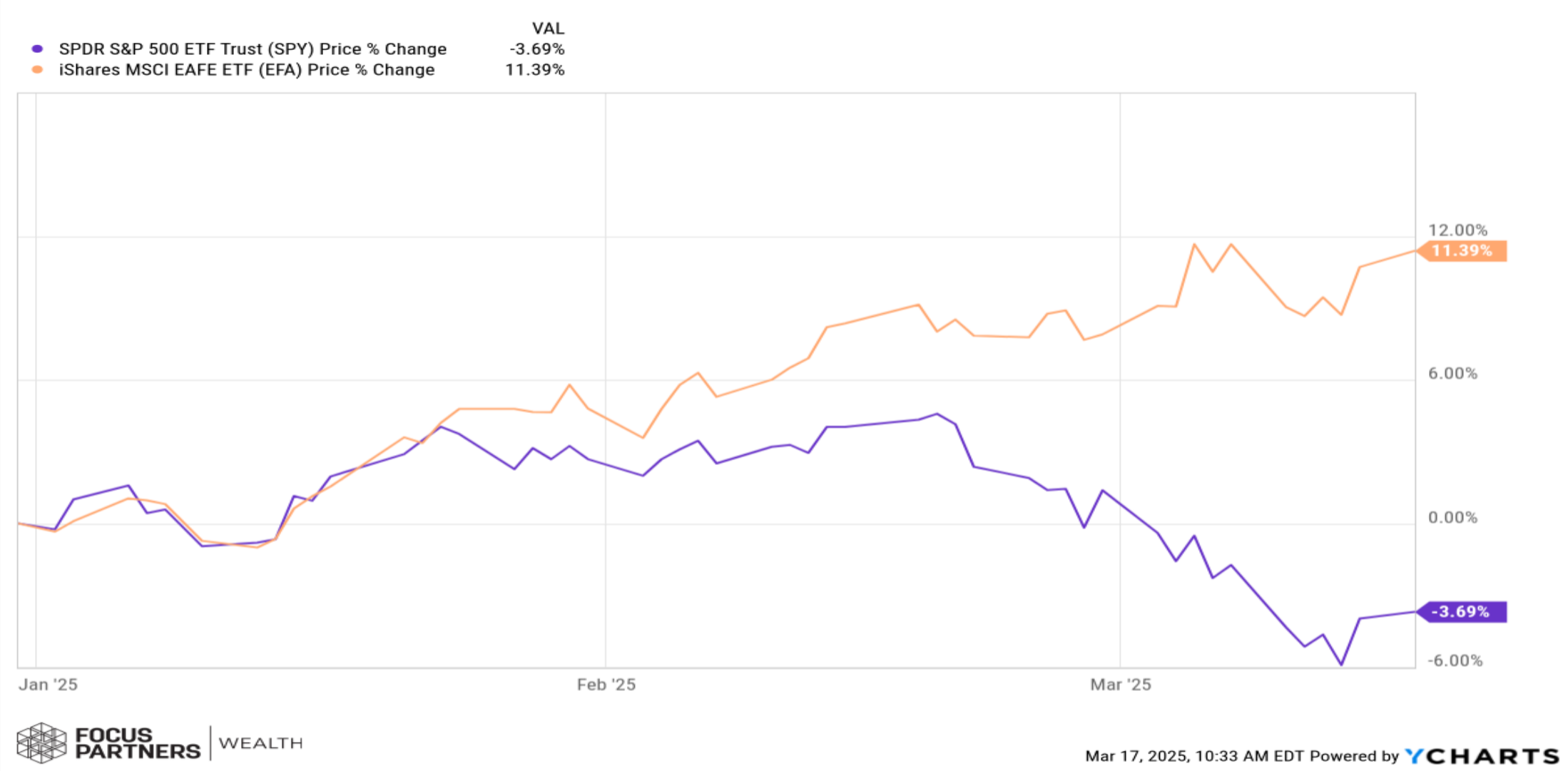
Mar 17, 2025, 10:32 AM EDT Powered by YCHARTS

Source: Ycharts, YTD through 3/14/2025

Please see important disclosures at the end of this presentation.



Chart #2: International Developed Stocks Powering Up



Source: Ycharts, YTD through 3/14/2025

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Appendix

Correction / Recession Indicators

Market Price Indicators		Economic Indicators		Sentiment Indicators	
Commodities Trend (50 Day Moving Average) ¹	Rising	Continued Unemployment Claims (mln) ²	1,870	CNN Fear/Greed Index ³	Ext Fear
S&P 500 Trend (200 Day Moving Average) ¹	Declining	GDP Nowcast (1.5-2.5% ave) ⁵	-2.4%	AAll % Bulls Sentiment (39% ave) ⁴	19.1%
High Yield Credit Spreads (579 bps ave) ²	340	Case-Schiller 20 Mkt HPI (y/y) ⁶	4.53%	Volatility Index (13-19 ave) ¹	21.7
BBB Credit Spreads (172 bps ave) ²	120	US ISM Manufacturing (>50= expansion) ²	50.3	CBOE Total Put/Call Ratio (range = 0.9 to 1.1) ¹	0.96
Yield Curve 10yr – 3M (175 bps ave) ²	-2	US ISM Services (>50= expansion) ²	53.5	% S&P 500 Stocks Above the 200 Day Moving Average (40-60 ave) ¹	40%
Yield Curve 10yr -2yr ²	29	Headline Consumer Price Index (y/y) ²	3.00%	Total Positive	8 / 19
NYSE Advance/Decline Line (month/month) ¹	Declining	Leading Economic Index (m/m) ₂	-0.3%	Total Negative	4 / 19

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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