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Unemployment: Jobs data was generally positive this week. Initial Jobless Claims fell from 214K to 213K. Continuing Jobless Claims dropped from 1,871K to 1,850K. JOLTS job openings rose from 6.550M to 6.946M, better than expected.



Consumer Goods & Materials: Core Personal Consumption Expenditure Price Index (PCE) rose 0.4% in January (MoM), in line with the forecast. The annual measure increased 3.1% as expected. Core PCE excludes volatile food and energy prices and is the Fed's preferred measure of inflation.



Consumer Price Index: Consumer Price Index (CPI) increased 0.3% in February (MoM), which was up from January and in line with the forecast. The annual measure rose 2.4%.



Housing and Building: Existing Home Sales rose 1.7% in February (MoM). The annualized measure increased 4.09M, up from 4.02M in January and better than expected.



Yield Curve: The yield curve flattened this week. The 2-year yield jumped from 3.56% to 3.73%. The benchmark 10-year yield rose from 4.15% to 4.28%.



GDP: Gross Domestic Product (QoQ)(Q4) second release numbers point to a decrease from 4.4% (Q3) to 0.7% (Q4), lower than forecast.



Manufacturing & Services: ISM Manufacturing PMI eased slightly from 52.6 to 52.4 (MoM)(Feb), but still beat the forecast. Services PMI rose from 53.8 to 56.1 (MoM)(Feb), the highest since 2022. 50 is the contraction / expansion line.



S&P 500: The S&P 500 fell 107.83 points this week, closing at 6,632.19 (down % YTD). The CBOE Volatility Index (VIX) fell from 27.7 to 23.8.



U. Of Michigan Consumer Sentiment: Preliminary Consumer Sentiment projects a decrease from 56.6 (Feb) to 55.5 (Mar).

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