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Unemployment: Jobs data was generally negative this week. Initial Jobless claims increased from 208K to 214K. Continuing Claims rose from 1,809K to 1,821K.

Consumer Goods & Materials: Producer Price Index (PPI) held steady in March at 0.5% (MoM), which was lower than expected. The annual measure increased 4.0%, up from February but below the forecast.

Retail Sales: U.S. retail sales rose 1.7% in March (MoM), the strongest monthly increase since 2023. Excluding volatile gas, autos, and food, the measure rose by 0.6%. Retail Sales are a key gauge of consumer spending, which drives the majority of overall economic activity.

Housing and Building: Existing Home Sales fell 3.6% in March (MoM). The annualized number of homes sold was 3.98M, which was fewer than expected.

Yield Curve: The yield curve flattened this week. The 2-year yield rose from 3.71% to 3.78%. The benchmark 10-year yield increased from 4.26% to 4.31%.

GDP: Final GDP numbers for Q4 confirm a slowdown from 4.4% (QoQ)(Q3) to 0.5%, a larger decline than expected.

Manufacturing & Services: ISM Non-Manufacturing PMI slowed from 56.1 (Feb) to 54.0 (MoM)(Mar) but remained in expansion territory. 50 is the contraction / expansion line.

S&P 500: The index rose 39.02 points to close at 7,165.08 (up 4.67% YTD). The CBOE Volatility Index (VIX) fell slightly from 20 to 18.8.

U. of Michigan Consumer Sentiment: Revised Consumer Sentiment confirmed a decline from 53.3 (Mar) to 49.8 (Apr), which is the lowest on record (previous low of 50.0 in 2022).

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