

# February 13, 2026



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**TITLE:** Investment Adviser Rep  
**TAGS:** Jobs, CPI, Retail Sales, Housing, Yields, S&P 500,



**Unemployment:** Jobs data was mixed this week. Nonfarm Payrolls showed 130K jobs added (Jan), up from 48K last month. Unemployment Rate dropped from 4.4% (Dec) to 4.3% (Jan). Initial Jobless Claims fell from 232K to 227K. Continuing Jobless Claims increased from 1,841K to 1,862K.



**Consumer Goods & Materials:** Consumer Price Index (CPI) rose 0.2% in January, down from 0.3% in the previous month. The annual measure increased 2.4%. Both reports were better than forecast, indicating a potential softening of inflation.



**Retail Sales:** Retail Sales, the biggest indicator of consumer spending, was flat in December (MoM), missing forecast.



**Housing and Building:** Existing Home Sales dropped 8.4% in January, the sharpest decrease since 2020. The annualized reading reflected a change from 4.27M to 3.91M homes sold.



**Yield Curve:** The yield curve flattened this week. 2-year yields dropped from 3.50% to 3.40%. 10-year yields fell from 4.22% to 4.04%.



**M2 Money Stock:** The money supply rose \$100B to \$22.40T (MoM)(Dec), now roughly 72% of current GDP.



**Manufacturing & Services:** ISM Manufacturing PMI spiked from 47.9 to 52.6 (MoM)(Jan), the first time in expansion in nearly a year. Services PMI was unchanged at 53.8 (MoM)(Jan). 50 is the contraction / expansion line.



**S&P 500:** The S&P 500 fell 97.22 points this week, closing at 6,835.08 (down .13% YTD). The CBOE Volatility Index (VIX) increased from 20 to 21.5.



**U. Of Michigan Consumer Sentiment:** Preliminary Consumer Sentiment projects an increase from 56.4 (Jan) to 57.3 (Feb).

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