March 14, 2025



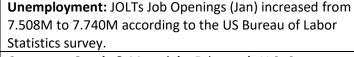
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TITLE: Investment Adviser Rep

TAGS: Jobs, CPI, Yields, S&P 500, Consumer Sentiment







Consumer Goods & Materials: February's U.S. Consumer Price Index (CPI) rose 0.2% month-over-month, under the 0.3% forecast. The annual inflation rate was 2.8%, also below expectations of 2.9%.

Retail Sales: Retail Sales (MoM)(Jan) fell 0.9%, compared to 0.2% forecast.

Housing and Building: U.S. MBA 30-Year Mortgage Rate fell from 6.88% to 6.73% this week, the lowest since December.











Yield Curve: Yields signaled a mixed performance this week. 2-year yields rose slightly from 3.99% to 4.02%. 10-year yields ticked down from 4.32% to 4.31%. Prices & rates move in opposite directions.

M2 Money Stock: The money supply, including time deposits, rose \$3B to \$21.56T (Jan). Money supply is running at 73% of current GDP.

Manufacturing & Services: February's ISM data showed a divergence between sectors. Manufacturing PMI decreased from 50.9 to 50.3. Non-Manufacturing (Services) PMI rose from 52.8 to 53.5. 50 marks contraction / expansion.

S&P 500: The S&P 500 declined for the fourth week in a row, dropping -131.26 points, and closing at 5,638.94 (down - 4.13% YTD). The CBOE Volatility Index (VIX) settled at 22.3 on Friday after rising above 29 this week.

U. of Michigan Consumer Sentiment: Preliminary Michigan Consumer Sentiment is expected to decline for the third month in a row, falling from 64.7 (Feb) to 57.9 (Mar).

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