Weekly Market Dashboard: February 14, 2025

Market overview

Stocks Bounce Back

The major U.S. equity indices finished the week in positive territory, regaining traction following tariff-related volatility the previous week. After two straight weeks of declines, the Nasdaq and S&P 500 rebounded, adding 2.6% and 1.5%, respectively. The Dow also rose higher, gaining 0.7%.

Sticky Inflation

U.S. inflation, as measured by the Consumer Price Index (CPI), remained sticky in January, accelerating 0.5% on the month and 3.0% on an annual basis. Notably, both readings came in above forecasts and were 0.1% higher than in December. Excluding food and energy, core CPI advanced 3.3% annually, also higher than estimates and an uptick from the previous month. Meanwhile, the Producer Price Index (PPI), a measure of wholesale inflation, rose 0.4%, above forecasts but lower than 0.5% in December.

Retail Ripple

U.S. retail sales slumped in January, retreating 0.9% month-over-month against estimates for a less severe 0.2% decline. This latest reading marked the largest monthly decrease in retail sales in nearly two years and represented a significant pullback in consumer spending compared to December's upwardly revised 0.7% gain. On a year-over-year basis, however, sales were 4.2% higher.

Gold Rush

The price of gold continued its recent upward trend during the week, reaching a record high of $2,964 per troy ounce intraday on Friday before closing around $2,900. Year-to-date, the price of gold has risen roughly 10%.

Market returns

Index	1 Week	YTD	1 Year	3 Year
S&P 500	1.52%	4.11%	23.96%	13.32%
Nasdaq	2.60%	3.76%	27.16%	14.15%
DJIA	0.65%	4.89%	18.14%	11.06%
Russell 2000	0.05%	2.33%	14.86%	5.64%
Russell Mid Cap	0.20%	4.49%	19.00%	8.36%
MSCI EAFE	2.65%	8.71%	11.71%	5.70%
MSCI EM	1.54%	5.29%	13.94%	-0.54%
Russell 1000 Value	0.65%	5.12%	18.98%	8.55%
Russell 1000 Growth	2.03%	3.76%	28.14%	16.69%
U.S. Agg. Bond	0.19%	1.12%	4.48%	-0.76%
Domestic 60/40 [1]	0.74%	2.85%	15.03%	6.63%
Global 60/40 [2]	0.99%	3.61%	13.15%	5.27%

The week ahead

Housing Starts (Jan)
(Wednesday, February 19)

FOMC Meeting Minutes
(Wednesday, February 19)

Manufacturing PMI *P* (Feb)
(Friday, February 21)

Services PMI *P* (Feb)
(Friday, February 21)

Existing Home Sales (Jan)
(Friday, February 21)

Michigan Consumer Sentiment (Feb)
(Friday, February 21)

Equity style returns

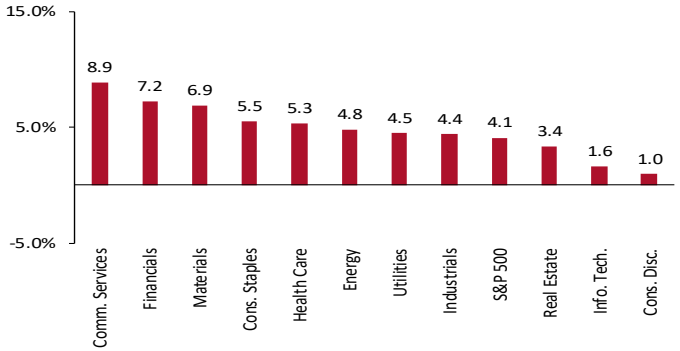
1-Week %

	Value	Core	Growth
Large	0.65	1.52	2.03
Mid	-0.02	0.20	0.80
Small	0.29	0.05	-0.18

YTD %

	Value	Core	Growth
Large	5.12	4.11	3.76
Mid	2.76	4.49	9.47
Small	2.00	2.33	2.64

YTD equity sector returns



U.S. Treasury yields

Date	2-Yr	5-Yr	10-Yr	30-Yr
2/14/2025	4.26%	4.33%	4.47%	4.60%
1/14/2025	4.37%	4.59%	4.78%	4.98%
2/14/2024	4.56%	4.25%	4.27%	4.45%

See page 2 for complete sources and important disclosures.

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Disclosure

U.S. Treasury Data from U.S. Department of the Treasury. Equity, Index, and Sector returns from Morningstar. Equity Style Returns: Large Core – S&P 500 TR, Large Value – Russell 1000 Value TR, Large Growth – Russell 1000 Growth TR, Mid Core – Russell Midcap Index TR, Mid Value – Russell Midcap Value TR, Mid Growth – Russell Midcap Growth TR, Small Core – Russell 2000 TR, Small Value – Russell 2000 Value TR, Small Growth – Russell 2000 Growth TR, U.S. Agg. Bond – Bloomberg U.S. Aggregate Bond Index. Equity Sector Returns: Utilities – S&P 500 Sec/Utilities TR USD, Cons. Disc. – S&P 500 Sec/Cons Disc TR USD, Cons. Staples – S&P 500 Sec/Cons Staples TR USD, Energy – S&P 500 Sec/Energy TR USD, Financials – S&P 500 Sec/Financials TR USD, Real Estate – S&P 500 Sec/Real Estate TR USD, Health Care – S&P 500 Sec/Health Care TR USD, Industrials – S&P 500 Sec/Industrials TR USD, Info. Tech. – S&P 500 Sec/Information Technology TR USD, Materials – S&P 500 Sec/Materials TR USD, Comm. Services – S&P 500 Sec/Comm. Services TR USD, S&P 500 – S&P 500 TR USD. *P* = Preliminary Release.

[1] Domestic 60/40: 42% S&P 500 TR, 6% Russell 2000 TR, 12% Russell Mid Cap TR, 40% Bloomberg U.S. Aggregate Bond Index.

[2] Global 60/40: 29% S&P 500 TR, 4% Russell 2000 TR, 8% Russell Mid Cap TR, 40% Bloomberg U.S. Aggregate Bond Index, 15% MSCI EAFE NR, 4% MSCI EM NR

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