Weekly Market Dashboard: October 10, 2025

Market overview

Stocks Backtrack

The major U.S. equity indices closed the week in negative territory, precipitated by a larger selloff on Friday that saw the Dow, S&P 500 and Nasdaq retreat between 1.9% and 3.6%. For the week, the Dow posted the greatest decline, falling 2.7% while the Nasdaq and S&P 500 gave back 2.5% and 2.4%, respectively.

Gold Rush

The price of gold eclipsed the $4,000 per ounce mark for the first time ever earlier in the week, rising as high as $4081 intraweek before closing Friday just above $4000. Notably, this was the eighth straight week of gains for the precious metal. Year to date, gold has risen roughly 51% while the value of the U.S. dollar has fallen nearly 9%.

Steady Sentiment

The University of Michigan's Consumer Sentiment Index fell to a level of 55 from 55.1 in September, according to its preliminary October reading. Virtually unchanged from the prior month, this latest print was above forecasts for a 54.2 result. Meanwhile, year-ahead inflation expectations ebbed to 4.6% from 4.7% in September.

Oil Slick

Amid the prospect for additional, higher U.S. tariffs on imports from China, the price of U.S. crude oil slid over 4% on Friday to cap off a roughly 3.7% weekly pullback. This latest decline placed the price of crude oil back below $60 a barrel, at the lowest level since early May.

Market returns

Index	1 Week	YTD	1 Year	3 Year
S&P 500	-2.41%	12.54%	14.85%	23.77%
Nasdaq	-2.53%	15.57%	22.27%	29.17%
DJIA	-2.70%	8.34%	8.97%	18.19%
Russell 2000	-3.28%	8.52%	10.92%	13.93%
Russell Mid Cap	-3.36%	7.49%	8.64%	16.00%
MSCI EAFE	-1.86%	24.77%	17.44%	21.32%
MSCI EM	-0.58%	29.42%	20.46%	18.38%
Russell 1000 Value	-2.70%	9.35%	7.54%	15.55%
Russell 1000 Growth	-2.23%	14.95%	21.88%	30.67%
U.S. Agg. Bond	0.33%	6.75%	4.99%	5.22%
Domestic 60/40 [1]	-1.48%	9.38%	9.92%	14.83%
Global 60/40 [2]	-1.27%	12.15%	10.85%	14.73%

The week ahead

Consumer Price Index (Sep)
(Wednesday, October 15)

Producer Price Index (Sep)
(Thursday, October 16)

Retail Sales (Sep)
(Thursday, October 16)

Nonfarm Payrolls (Sep)
(Friday, October 17)

Unemployment Rate (Sep)
(Friday, October 17)

Equity style returns

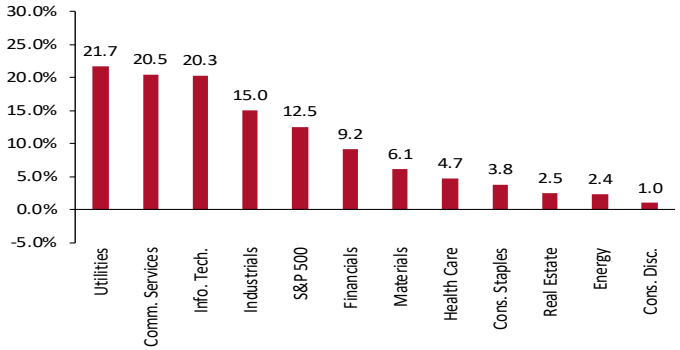
1-Week %

	Value	Core	Growth
Large	-2.70	-2.41	-2.23
Mid	-3.76	-3.36	-2.12
Small	-4.05	-3.28	-2.58

YTD %

	Value	Core	Growth
Large	9.35	12.54	14.95
Mid	6.30	7.49	10.77
Small	6.29	8.52	10.61

YTD equity sector returns



U.S. Treasury yields

Date	2-Yr	5-Yr	10-Yr	30-Yr
10/10/2025	3.52%	3.65%	4.05%	4.63%
9/10/2025	3.54%	3.59%	4.04%	4.69%
10/10/2024	3.98%	3.91%	4.09%	4.38%

See page 2 for complete sources and important disclosures.

LCN-8491592-101325

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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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