

Market Update 3-17-14

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Thomas Cymer CFP® CRPC® Presents:

# WEEKLY ECONOMIC UPDATE

March 17, 2014

**WEEKLY QUOTE**

"Every day brings a chance for you to draw in a breath, kick off your shoes, and dance."

- Oprah Winfrey

**WEEKLY TIP**

Making a donation to a charity can give you an immediate tax deduction for the amount of the donation and help you avoid capital gains tax if they are derived from certain assets. Consider this move if you like to itemize deductions and you are in a higher tax bracket.

**WEEKLY RIDDLE**

What binds two people together yet touches only one person at a time?

**Last week's riddle:**

Lidia immediately went bankrupt after the car she was pushing around stopped in front of a hotel. It sounds sad, but she wasn't upset. What was she doing?

**Last week's answer:**

She was playing Monopoly.

**RETAIL SALES UP 0.3% IN FEBRUARY**

Weather didn't stop Americans from shopping last month. February's headline gain in retail sales was the first in three months and represented a nice turnaround from the (revised) 0.6% drop measured by the Commerce Department for January. Minus car and truck buying, the February increase was still 0.3%. Sales at clothing and furniture retailers led the way, both improving 0.4% on the month.<sup>1</sup>

**SENTIMENT COOLS AS WEATHER WARMS**

The preliminary March reading for the University of Michigan's monthly consumer sentiment index was just 79.9, a 4-month low. February's final mark was 81.6, and analysts polled by MarketWatch forecast an initial March reading of 80.8.<sup>2,3</sup>

**PRODUCER PRICES RETREAT, AGAINST EXPECTATIONS**

After rising 0.2% for January, the Producer Price Index ticked down 0.1% in February; in a Bloomberg survey, economists projected a 0.2% increase. The core PPI (minus food and energy prices) dropped 0.2% last month. Over the past year, the headline PPI has risen just 0.9%.<sup>2,3</sup>

**OVERSEAS HEADLINES HAMPER STOCKS**

Would Crimeans vote to leave Ukraine and join Russia on March 16? To what degree was China's economy cooling off? These questions preoccupied Wall Street last week, and the Dow, S&P 500 and Nasdaq all turned south. The 5-day performances: S&P, -1.97% to 1,841.13; Dow, -2.35% to 16,065.67; Nasdaq, -2.10% to 4,245.40.<sup>4,5</sup>

**THIS WEEK:** Monday morning, Wall Street will react to the outcome of the Crimean referendum; the March NAHB housing market index and the Federal Reserve's report on February industrial output also arrive. Tuesday, investors will consider February's CPI, data on February housing starts and building permits, and earnings from Oracle, Perry Ellis, Adobe and Hertz. Wednesday brings a Federal Reserve policy announcement (and the potential for further tapering of QE3); Guess, KB Home, FedEx and General Mills announce quarterly results. On Thursday, NAR issues February existing home sales figures, the Conference Board puts out its February leading indicator index, a new round of initial jobless claims data arrives, and Nike, ConAgra and Lennar present earnings. No major economic releases are scheduled for Friday.

% CHANGE	Y-T-D	1-YR CHG	5-YR AVG	10-YR AVG
DJIA	-3.08	+10.50	+24.48	+5.90
NASDAQ	+1.65	+30.27	+39.31 +39.1	+11.89

S&P 500	-0.39	+17.78	+28.67	+6.67
<b>REAL YIELD</b>	<b>3/14 RATE</b>	<b>1 YR AGO</b>	<b>5 YRS AGO</b>	<b>10 YRS AGO</b>
10 YR TIPS	0.49%	-0.53%	1.87%	1.47%

Sources: USATODAY.com, bigcharts.com, treasury.gov - 3/14/14<sup>5,6,7,8</sup>

Indices are unmanaged, do not incur fees or expenses, and cannot be invested into directly. These returns do not include dividends.

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**Citations.**

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- 3 - bloomberg.com/news/2014-03-14/wholesale-prices-in-u-s-unexpectedly-drop-on-cheaper-services.html [3/14/14]
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Week of September 30th, 2013

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