

Stock Index Performance

Index	Week	YTD	12-mo.	2017	5-yr.
Dow Jones Industrial Avg. (26,447)	0.00%	8.83%	18.75%	28.11%	14.63%
S&P 500 (2,886)	-0.95%	9.52%	15.25%	21.82%	13.58%
NASDAQ 100 (7,399)	-2.97%	16.61%	23.44%	32.99%	19.34%
S&P 500 Growth	-1.99%	14.91%	21.19%	27.43%	15.93%
S&P 500 Value	0.32%	3.84%	8.86%	15.35%	10.81%
S&P MidCap 400 Growth	-3.29%	5.26%	11.07%	19.91%	11.26%
S&P MidCap 400 Value	-1.74%	4.19%	8.44%	12.30%	10.67%
S&P SmallCap 600 Growth	-4.57%	13.92%	16.77%	14.71%	13.30%
S&P SmallCap 600 Value	-3.20%	6.40%	8.95%	11.43%	11.34%
MSCI EAFE	-2.34%	-3.74%	0.33%	25.03%	3.94%
MSCI World (ex US)	-2.75%	-5.76%	-1.56%	27.19%	3.47%
MSCI World	-1.47%	3.88%	8.73%	22.40%	8.89%
MSCI Emerging Markets	-4.49%	-11.82%	-7.08%	37.28%	2.24%
S&P GSCI	1.71%	13.76%	25.18%	5.77%	-9.83%

Source: Bloomberg. Returns are total returns. 5-yr. return is an average annual. One-week, YTD, 12-mo. and 5-yr. performance returns calculated through 10/5/18. An index cannot be purchased directly by investors. Past performance is no guarantee of future results.

S&P Sector Performance

Index	Week	YTD	12-mo.	2017	5-yr.
Communication Services	-2.20%	-1.46%	1.15%	-1.25%	6.16%
Consumer Discretionary	-4.37%	15.34%	24.64%	22.98%	14.84%
Consumer Staples	-0.89%	-4.21%	1.33%	13.49%	8.98%
Energy	1.86%	9.46%	15.78%	-1.01%	1.53%
Financials	1.59%	1.69%	8.33%	22.14%	13.58%
Health Care	-0.80%	15.70%	15.67%	22.08%	14.88%
Industrials	0.77%	5.64%	10.49%	21.01%	13.08%
Information Technology	-2.20%	17.97%	27.02%	38.83%	21.70%
Materials	-0.51%	-3.23%	1.31%	23.84%	8.39%
Real Estate	-2.71%	-1.08%	1.39%	10.85%	7.15%
Utilities	1.86%	4.62%	4.03%	12.11%	11.57%

Source: Bloomberg. Returns are total returns. 5-yr. return is an average annual. One-week, YTD, 12-mo. and 5-yr. performance returns calculated through 10/5/18. An index cannot be purchased directly by investors. Past performance is no guarantee of future results.

Bond Index Performance

Index	Week	YTD	12-mo.	2017	5-yr.
U.S. Treasury: Intermediate	-0.43%	-1.24%	-1.59%	1.14%	0.85%
GNMA 30 Year	-0.99%	-1.90%	-1.90%	1.87%	1.67%
U.S. Aggregate	-0.94%	-2.53%	-2.10%	3.54%	1.98%
U.S. Corporate High Yield	-0.44%	2.12%	2.42%	7.51%	5.35%
U.S. Corporate Investment Grade	-1.06%	-3.37%	-2.30%	6.42%	3.31%
Municipal Bond: Long Bond (22+)	-0.95%	-2.07%	-0.03%	8.19%	5.23%
Global Aggregate	-1.05%	-3.39%	-1.96%	7.40%	0.48%

Source: Bloomberg Barclays. Returns are total returns. 5-yr. return is an average annual. One-week, YTD, 12-mo. and 5-yr. performance returns calculated through 10/5/18. An index cannot be purchased directly by investors. Past performance is no guarantee of future results.

Key Rates

Fed Funds	2.00-2.25%	2-yr T-Note	2.89%
LIBOR (1-month)	2.27%	5-yr T-Note	3.07%
CPI - Headline	2.70%	10-yr T-Note	3.23%
CPI - Core	2.20%	30-yr T-Bond	3.40%
Money Market Accts.	1.20%	30-yr Mortgage Refinance	4.77%
1-yr CD	2.54%	Prime Rate	5.25%
3-yr CD	2.62%	Bond Buyer 40	4.23%
5-yr CD	2.83%		

Sources: Bankrate.com, Federal Reserve Bank NY, & US Bureau of Labor Statistics. All data as of 10/5/18.

Market Indicators

TED Spread	20 bps
Investment Grade Spread (A2)	130 bps
ML High Yield Master II Index Spread	332 bps

Source: Bloomberg as of 10/5/18.

Weekly Fund Flows

Estimated Flows to Long-Term Mutual Funds for the Week Ended 9/26/18

	Current Week	Previous
Domestic Equity	-\$4.203 Billion	-\$2.436 Billion
Foreign Equity	-\$2.762 Billion	\$59 Million
Taxable Bond	\$3.269 Billion	\$1.519 Billion
Municipal Bond	-\$268 Million	\$59 Million

Change in Money Market Fund Assets for the Week Ended 10/3/18

	Current Week	Previous
Retail	\$8.20 Billion	\$1.44 Billion
Institutional	-\$19.89 Billion	\$16.48 Billion

Source: Investment Company Institute.

Factoids for the week of October 1, 2018

Monday, October 1, 2018

Baker Hughes reported that 863 crude oil rigs were active in the U.S. on 9/28/18, up 113 rigs from 9/29/17, according to Bloomberg. The price of crude oil (WTI) closed at \$73.25 per barrel on 9/28/18, up 41.77% from where it closed on 9/29/17. Baker Hughes also reported that 189 natural gas rigs were active in the U.S. on 9/28/18, unchanged from 9/29/17. The price of natural gas closed at \$3.01 per million British thermal units on 9/28/18, also unchanged from 9/29/17.

Tuesday, October 2, 2018

In September, the dividend payers (411) in the S&P 500 Index (equal weight) posted a total return of 0.03%, vs. 0.58% for the non-payers (94), according to S&P Dow Jones Indices. There are currently 505 stocks in the index. Year-to-date, payers were up 6.22%, vs. a gain of 18.28% for the non-payers. For the 12-month period ended September 2018, payers were up 13.22%, vs. a gain of 23.73% for the non-payers. The number of dividend increases in September totaled 13, down from 16 a year ago. Year-to-date, dividend increases totaled 288, up from 262 over the same period a year ago. No dividends were decreased in September, as was the case a year ago.

Wednesday, October 3, 2018

Investors continue to favor passive mutual funds and exchange-traded funds (ETFs) over those actively managed, according to data from Morningstar. For the 12-month period ended August 2018, investors funneled an estimated net \$525.0 billion into passive funds and ETFs, compared to net outflows totaling \$41.8 billion from active funds and ETFs.

Thursday, October 4, 2018

Worldwide sales of semiconductors totaled an all-time high of \$40.16 billion in August, up 14.87% from the \$34.96 billion sold in August 2017 and up 1.70% from the \$39.49 billion sold in July 2018, according to the Semiconductor Industry Association (SIA). All major semiconductor product categories and regional markets reflected year-over-year growth. On a year-over-year basis, the percent change in region/country semiconductor sales in August were as follows: China (27.3%); the Americas (15.0%); Europe (9.5%); Japan (8.4%); and Asia Pacific/All Other (4.7%). Year-to-date through 10/3/18, the Philadelphia Semiconductor Index posted a total return of 11.04%, compared to 21.61% for the S&P 500 Information Technology Index and 11.01% for the S&P 500 Index, according to Bloomberg.

Friday, October 5, 2018

S&P Dow Jones Indices announced that total dividend distributions for U.S. common stocks increased by a net (increases less decreases) \$19.2 billion in Q3'18, up from \$15.0 billion in Q3'17, according to its own release. For the 12-month period ended 9/28/18, net dividend increases totaled \$55.5 billion, up from \$41.5 billion for the 12-month period ended 9/29/17. In Q3'18, there were 460 dividend increases, up from 438 in Q3'17. The number of dividends cut or suspended totaled 67, down from 93 in Q3'17. Currently, 81.4% of the companies in the S&P 500 Index pay a dividend, compared to 70.3% of the companies in the S&P MidCap 400 Index and 51.9% of the companies in the S&P SmallCap 600 Index.

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