

Stock Index Performance

| Index | Week | YTD | 12-mo. | 2017 | 5-yr. |
|------------------------------------|--------|--------|--------|--------|---------|
| Dow Jones Industrial Avg. (24,103) | 0.61% | -1.96% | 19.42% | 28.11% | 13.31% |
| S&P 500 (2,641) | -0.08% | -0.76% | 14.06% | 21.82% | 13.28% |
| NASDAQ 100 (6,581) | -1.50% | 3.15% | 22.52% | 32.99% | 19.94% |
| S&P 500 Growth | -0.62% | 1.93% | 19.75% | 27.43% | 15.35% |
| S&P 500 Value | 0.53% | -3.58% | 7.77% | 15.35% | 10.85% |
| S&P MidCap 400 Growth | -0.11% | 1.35% | 16.22% | 19.91% | 12.60% |
| S&P MidCap 400 Value | 0.57% | -3.01% | 6.85% | 12.30% | 10.98% |
| S&P SmallCap 600 Growth | -0.65% | 2.40% | 16.00% | 14.71% | 14.27% |
| S&P SmallCap 600 Value | -0.27% | -1.34% | 11.65% | 11.43% | 12.63% |
| MSCI EAFE | -0.44% | -1.70% | 14.11% | 25.03% | 6.46% |
| MSCI World (ex US) | -0.86% | -1.33% | 15.59% | 27.19% | 5.86% |
| MSCI World | -0.25% | -1.34% | 13.36% | 22.40% | 9.69% |
| MSCI Emerging Markets | -2.22% | 1.28% | 23.05% | 37.28% | 5.00% |
| S&P GSCI | 0.62% | 2.19% | 14.84% | 5.77% | -11.88% |

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 3/29/18. 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. |
|------------------------|--------|--------|--------|--------|--------|
| Consumer Discretionary | -0.86% | 3.08% | 17.23% | 22.98% | 15.65% |
| Consumer Staples | 2.23% | -7.12% | -1.37% | 13.49% | 8.61% |
| Energy | 0.41% | -5.88% | -0.06% | -1.01% | -0.41% |
| Financials | -0.36% | -0.95% | 18.58% | 22.14% | 15.41% |
| Health Care | -0.14% | -1.22% | 10.97% | 22.08% | 13.92% |
| Industrials | 0.64% | -1.56% | 14.20% | 21.01% | 13.98% |
| Information Technology | -1.06% | 3.53% | 27.73% | 38.83% | 20.62% |
| Materials | -0.40% | -5.52% | 10.48% | 23.84% | 9.89% |
| Real Estate | 1.79% | -5.02% | 2.39% | 10.85% | 4.91% |
| Telecom Services | 1.46% | -7.48% | -4.95% | -1.25% | 4.11% |
| Utilities | 1.56% | -3.30% | 1.49% | 12.11% | 9.15% |

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 3/29/18. 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 | 0.24% | -0.75% | -0.16% | 1.14% | 0.74% |
| GNMA 30 Year | 0.39% | -1.28% | 0.29% | 1.87% | 1.49% |
| U.S. Aggregate | 0.52% | -1.46% | 1.20% | 3.54% | 1.83% |
| U.S. Corporate High Yield | 0.11% | -0.86% | 3.78% | 7.51% | 4.99% |
| U.S. Corporate Investment Grade | 0.75% | -2.32% | 2.70% | 6.42% | 3.02% |
| Municipal Bond: Long Bond (22+) | 0.46% | -1.56% | 4.68% | 8.19% | 3.96% |
| Global Aggregate | -0.09% | 1.36% | 6.97% | 7.40% | 1.50% |

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 3/29/18. An index cannot be purchased directly by investors. Past performance is no guarantee of future results.

Key Rates

| | | | |
|---------------------|------------|--------------------------|-------|
| Fed Funds | 1.50-1.75% | 5-yr CD | 2.47% |
| LIBOR (1-month) | 1.88% | 2-yr T-Note | 2.27% |
| CPI - Headline | 2.20% | 5-yr T-Note | 2.56% |
| CPI - Core | 1.80% | 10-yr T-Note | 2.74% |
| Money Market Accts. | 1.09% | 30-yr T-Bond | 2.97% |
| Prime Money Funds | 1.24% | 30-yr Mortgage Refinance | 4.22% |
| 1-yr CD | 2.04% | Prime Rate | 4.75% |
| 3-yr CD | 2.18% | Bond Buyer 40 | 3.98% |

Sources: Bankrate.com, Barron's and Bloomberg. The rate shown for Prime Money Funds is as of 3/28/18. All other rates are as of 3/29/18.

Market Indicators

As of 3/29/18

| | |
|--------------------------------------|---------|
| TED Spread | 58 bps |
| Investment Grade Spread (A2) | 129 bps |
| ML High Yield Master II Index Spread | 372 bps |

Source: Bloomberg.

Weekly Fund Flows

Estimated Flows to Long-Term Mutual Funds for the Week Ended 3/21/18

| | Current Week | Previous |
|-----------------|-----------------|------------------|
| Domestic Equity | -\$535 Million | -\$6.300 Billion |
| Foreign Equity | \$2.557 Billion | \$2.545 Billion |
| Taxable Bond | \$4.610 Billion | \$5.739 Billion |
| Municipal Bond | \$705 Million | \$613 Million |

Change in Money Market Fund Assets for the Week Ended 3/28/18

| | Current Week | Previous |
|---------------|-----------------|----------------|
| Retail | -\$4.60 Billion | \$0.13 Billion |
| Institutional | \$8.49 Billion | \$4.81 Billion |

Source: Investment Company Institute.

Factoids for the week of March 26, 2018

Monday, March 26, 2018

BCD Travel, a consultant that works with corporate travel managers, predicts that airfares in North America will rise by 1% in 2018, while hotel rates will increase by 2-4%, according to the *Los Angeles Times*. Over the past few years, airfares for domestic flights got cheaper. Data from the Bureau of Transportation Statistics indicates that the average domestic airfare dropped from \$392 in 2014 to \$348 in 2017 (January-September). BCD Travel thinks fares will be up in 2018 due to strong demand for air travel and rising fuel costs, while hotel rates will rise modestly due in part to new hotel construction in the mid-scale and upscale tiers.

Tuesday, March 27, 2018

Global mergers and acquisitions (M&A) deal volume surpassed the \$1 trillion mark last week, the shortest amount of time it has ever taken to reach that mark, according to the *Financial Times*. Data from Dealogic shows that M&A activity is up more than 50% from a year ago and 12% higher than at the same point in 2007, which went on to set the all-time high for M&A deal volume at \$4.6 trillion.

Wednesday, March 28, 2018

In 2016 and 2017, the S&P 500 Index registered several multi-month periods without experiencing a single up or down day of more than 1%, according to Bloomberg. Year-to-date, there have already been 22 days in which the index has fluctuated by more than 1% in a trading day, triple the total for all of 2017.

Thursday, March 29, 2018

Data from Renaissance Capital shows that a total of 44 equity IPOs (market caps in excess of \$50 million) were priced in the U.S. in Q1'18, up 76.0% from Q1'17 (thru 3/29), according to its own release. The 44 companies raised a combined \$15.5 billion, up 57.4% from the same period a year ago. Health Care, Technology, Consumer Discretionary and Energy were the most active sectors in the IPO market in Q1'18.

Friday, March 30, 2018

No Factoid. Holiday – Good Friday.

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