

- U.S. stocks moved higher over the week, breaking a streak of three prior consecutive weekly losses, as investor sentiment remained focused on Fed rate hikes and inflation. The S&P 500 Index finished the week up 3.6% on a total return basis.
- A rally in heavily-weighted Tesla helped Consumer Discretionary outperform within the S&P 500 Index, while a mid-week decline in oil prices, which briefly hit their lowest level since Russia's invasion of Ukraine, caused Energy to underperform, although the sector still recorded a gain.
- The yield on the 10-year U.S. Treasury note moved higher to 3.33%, among a large European Central Bank (ECB) interest rate increase and heavier issuance of U.S. corporate bonds.

Figure 1. Index Performance

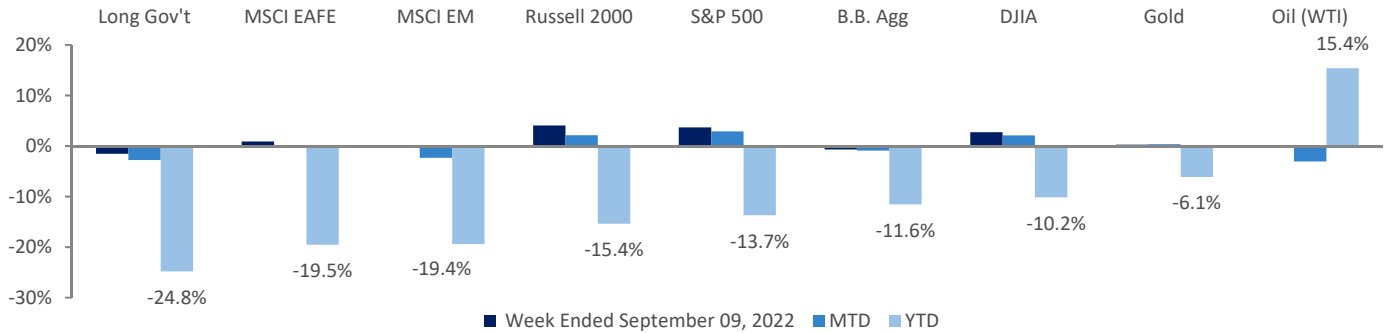


Figure 2. S&P 500 Sector Performance

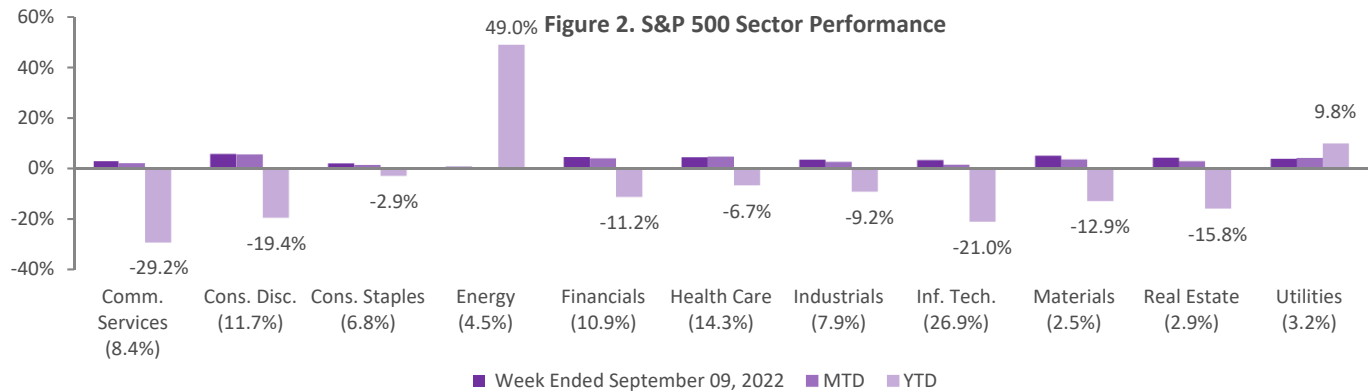
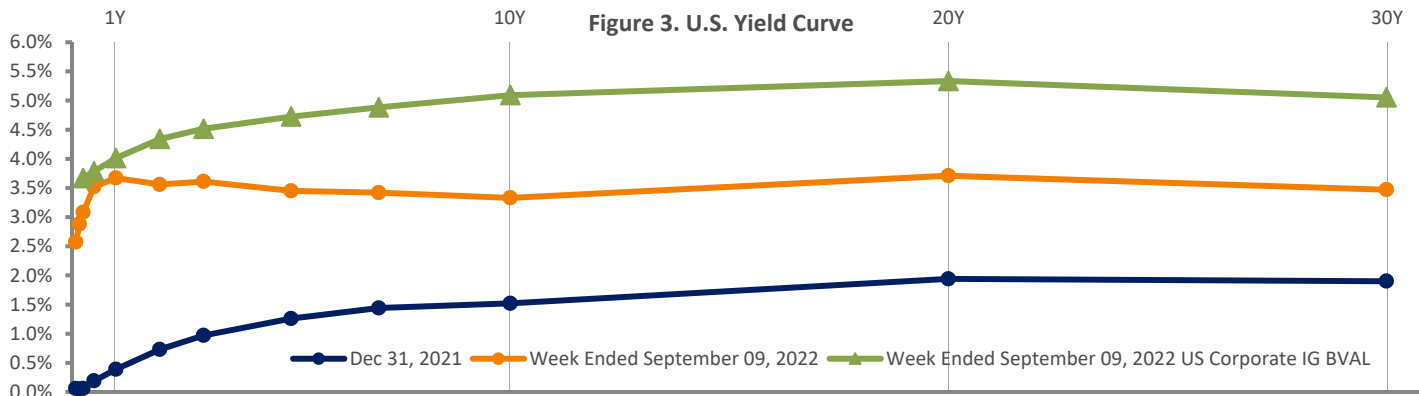


Figure 3. U.S. Yield Curve



Data Source: Bloomberg Index Services, MSCI, S&P Global, FTSE Russell

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