

- U.S. stocks kicked off the new quarter on a positive note, with the S&P 500 logging its biggest two-day rise since April 2020 before giving back some of those gains later in the week following a strong jobs report. The S&P 500 Index finished the week up 1.5% on a total return basis.
- On Friday, the Labor Department reported that the economy had added 263,000 jobs in September, while the unemployment rate had fallen back down to multiyear lows of 3.5%. The labor participation rate also dropped to 62.3%, indicating that competition for available workers would remain intense.
- The yield on the 2-year Treasury note moved higher to 4.30%, while the 10-year Treasury yield moved higher to 3.89%.

Figure 1. Index Performance

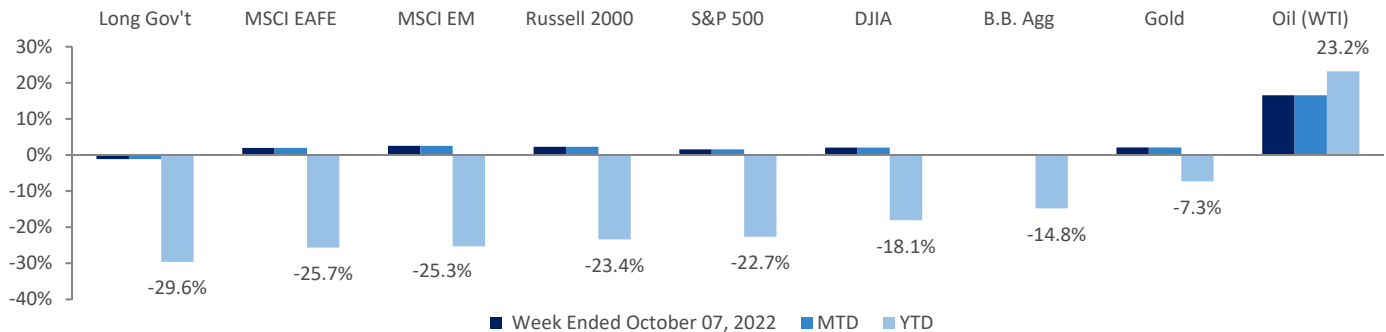


Figure 2. S&P 500 Sector Performance

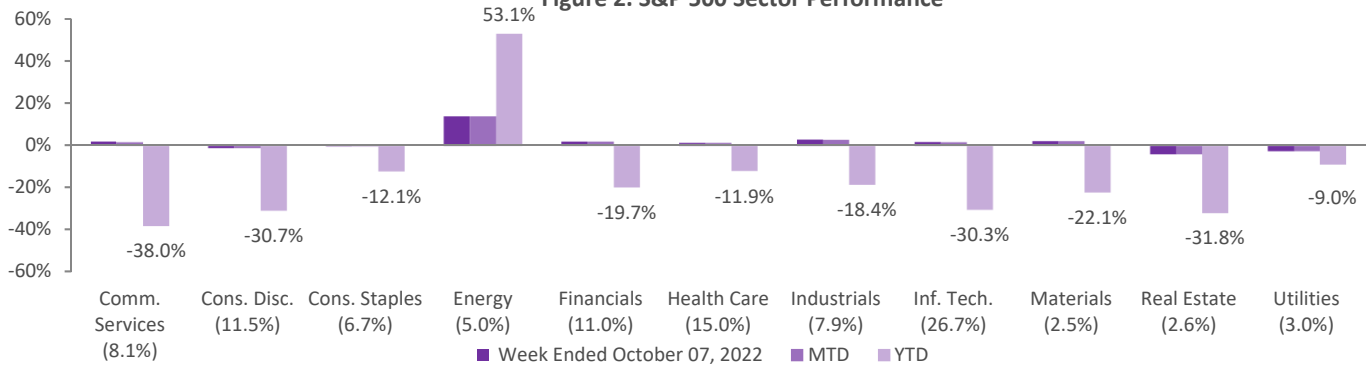
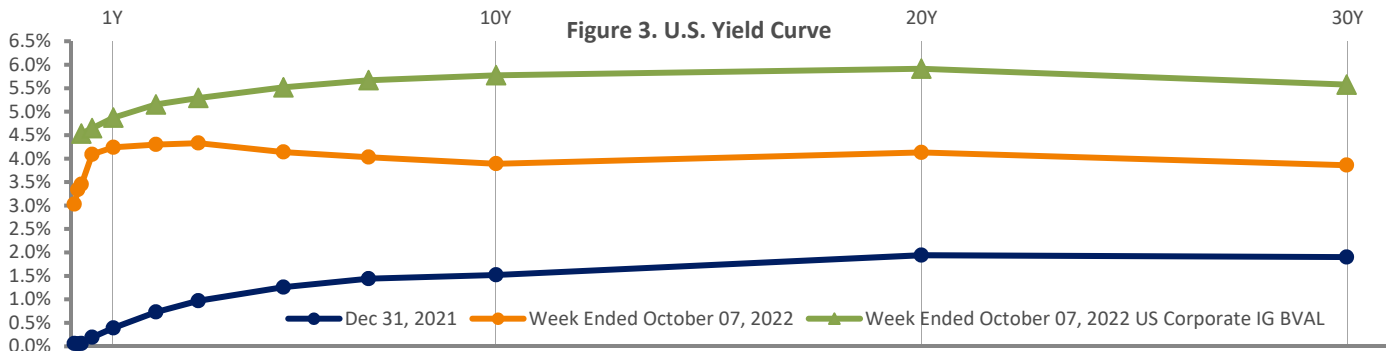


Figure 3. U.S. Yield Curve



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

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