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***In this week's recap:*** Stocks continued to rally for the most part last week, fueled by cautious investor optimism that U.S. involvement in the Middle East may be nearing an end.

## **Market Week: April 27, 2026**

### **The Markets (as of market close April 24, 2026)**

Stocks continued to rally for the most part last week, fueled by cautious investor optimism that U.S. involvement in the Middle East may be nearing an end. In addition, cooler inflation data (see below) along with the start of what is hoped to be a resilient earnings season also contributed to the rally. A resurgence in mega-cap tech shares helped push the NASDAQ to a 10-day winning streak, its longest in several years. The S&P 500 finished just shy of its January record high. The Dow and the Global Dow each ticked lower, while the small caps of the Russell 2000 edged higher. Information technology, energy, and consumer staples led the market sectors, while health care and financials lagged. Gold and silver prices slipped as oil prices and the dollar gained strength.

## Stock Market Indexes

Market/Index	2025 Close	Prior Week	As of 4/24	Weekly Change	YTD Change
DJIA	48,063.29	49,447.43	49,230.71	-0.44%	2.43%
NASDAQ	23,241.99	24,468.48	24,836.60	1.50%	6.86%
S&P 500	6,845.50	7,126.06	7,165.08	0.55%	4.67%
Russell 2000	2,481.91	2,776.90	2,787.00	0.36%	12.29%
Global Dow	6,169.34	6,640.71	6,583.92	-0.86%	6.72%
fed. funds target rate	3.50%-3.75%	3.50%-3.75%	3.50%-3.75%	0 bps	0 bps
10-year Treasuries	4.16%	4.24%	4.31%	7 bps	15 bps
US Dollar-DXY	98.26	98.18	98.52	0.35%	0.26%
Crude Oil-CL=F	\$57.46	\$83.12	\$95.43	14.81%	66.08%
Gold-GC=F	\$4,323.90	\$4,872.10	\$4,721.60	-3.09%	9.20%

Chart reflects price changes, not total return. Because it does not include dividends or splits, it should not be used to benchmark performance of specific investments.

## Last Week's Economic News

Retail sales rose 1.7% in March from the previous month. Since March 2025, retail sales increased 4.0%. Retail trade sales were up 1.9% from February 2026 and 4.2% from last year. Nonstore (online) retail sales were up 10.1% from last year, while sales at food services and drinking places rose 2.4% from March 2025.

- For the week ended April 18, there were 214,000 new claims for unemployment insurance, an increase of 6,000 from the previous week's level, which was revised up by 1,000. According to the Department of Labor, the advance rate for insured unemployment claims for the week ended April 11 was 1.2%, unchanged from the previous week's rate. The advance number of those receiving unemployment insurance benefits during the week ended April 11 was 1,821,000, an increase of 12,000 from the previous week's level, which was revised

down by 9,000. States and territories with the highest insured unemployment rates for the week ended April 4 were New Jersey (2.5%), Massachusetts (2.4%), Rhode Island (2.3%), Washington (2.2%), Minnesota (2.1%), California (2.0%), New York (1.9%), Oregon (1.9%), Illinois (1.8%), Michigan (1.7%), Nevada (1.7%), and Puerto Rico (1.7%). The largest increases in initial claims for unemployment insurance for the week ended April 11 were in New York (+8,145), Connecticut (+1,747), Georgia (+1,288), Virginia (+1,227), and Texas (+1,074), while the largest decreases were in Oregon (-3,773), Illinois (-2,112), Maryland (-910), New Jersey (-864), and Ohio (-492).

- The national average retail price for regular gasoline was \$4.044 per gallon on April 20, \$0.079 per gallon below the prior week's price but \$0.903 per gallon higher than a year ago. Also, as of April 20, the East Coast price decreased \$0.066 to \$3.888 per gallon; the Midwest price fell \$0.097 to \$3.789 per gallon; the Gulf Coast price declined \$0.124 to \$3.617 per gallon; the Rocky Mountain price ticked up \$0.041 to \$3.936 per gallon; and the West Coast price decreased \$0.057 to \$5.320 per gallon.

## Eye on the Week Ahead

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The first estimate of gross domestic product for the first quarter of 2026 is available this week. GDP advanced a mere 0.5% in the fourth quarter. The report on Personal Income and Outlays is also out this week. Within that report is the personal consumption expenditures price index, the Federal Reserve's preferred measure of inflation. According to the last report, inflation rose 0.4% in February and 2.8% for the year.

*Data sources: Economic: Based on data from U.S. Bureau of Labor Statistics (unemployment, inflation); U.S. Department of Commerce (GDP, corporate profits, retail sales, housing); S&P/Case-Shiller 20-City Composite Index (home prices); Institute for Supply Management (manufacturing/services). Performance: Based on data reported in WSJ Market Data Center (indexes); U.S. Treasury (Treasury yields); U.S. Energy Information Administration/Bloomberg.com Market Data (oil spot price, WTI, Cushing, OK); www.goldprice.org (spot gold/silver); Oanda/FX Street (currency exchange rates).*

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*The Dow Jones Industrial Average (DJIA) is a price-weighted index composed of 30 widely traded blue-chip U.S. common stocks. The S&P 500 is a market-cap weighted index composed of the common stocks of 500 largest, publicly traded companies in leading industries of the U.S. economy. The NASDAQ Composite Index is a market-*

value weighted index of all common stocks listed on the Nasdaq stock exchange. The Russell 2000 is a market-cap weighted index composed of 2,000 U.S. small-cap common stocks. The Global Dow is an equally weighted index of 150 widely traded blue-chip common stocks worldwide. The U.S. Dollar Index is a geometrically weighted index of the value of the U.S. dollar relative to six foreign currencies. Market indexes listed are unmanaged and are not available for direct investment.



#### **Key Dates/Data Releases**

*4/29: Durable goods orders, housing starts, international trade in goods, FOMC meeting statement*

*4/30: GDP, Personal Income and Outlays*

*5/1: S&P Global Manufacturing PMI*

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