

EAGLE FOCUS

weekly

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MARKET PERFORMANCE RECAP

WEEK ENDING
February 27, 2026

INDEX	LAST FRIDAY'S CLOSE	% CHANGE YTD
S&P 500	6878.88	0.49%
Dow Jones Industrial Average	48977.92	1.9%
Nasdaq Composite	22668.21	-2.47%
S&P MidCap 400	3575.27	8.17%
Russell 2000	2638.08	6.06%

The Conference Board's Consumer Confidence Index rose 2.2 points in February to 91.2, marking only its second increase in seven months but hinting at stabilizing consumer sentiment despite remaining near a five-year low. While assessments of current business conditions weakened and job availability stayed subdued, expectations for future economic and labor market conditions improved, easing recession concerns. Confidence varied across demographics, with those under 35 the most optimistic. (Source: Ned Davis Research)



Nearly 90% of trading in U.S. leveraged single-stock ETFs is driven by individual investors, according to a study co-authored by Direxion. The report shows that retail traders are almost entirely responsible for the rapid growth of these products, which let investors bet on short-term stock moves and accounted for 8% of all U.S. exchange trading last year. Morningstar Direct data shows there are now 355 leveraged single-stock ETFs in the U.S., with more than 275 launched since January 2025. (Source: Reuters)

Existing home prices edged higher at the end of the year after declining in the first half of 2025, but annual growth slowed to below 2%, trailing 2.7% CPI inflation and reducing real housing wealth. The S&P Cotality Case-Shiller National Home Price Index rose 0.4% in December, its fifth straight monthly gain, though year-over-year growth cooled to 1.3%, among the weakest since 2012. Similarly, the FHFA Purchase-Only House Price Index increased 0.1% for the month, with annual growth easing to 1.8%. (Source: Ned Davis Research)

A lighter regulatory environment has helped fuel rapid growth in embedded finance, which is projected to rise from \$108 billion in 2024 to about \$116 billion in 2025, even as companies anticipate stricter rules ahead. This year, the industry is centered on the CFPB's upcoming open banking rule, which will begin phasing in by April 1, 2026 and will require banks to provide free consumer data access while restricting how third parties can use that information. (Source: PYMNTS)

Small businesses are increasingly offering 401(k) plans, helping close a long-standing gap in the U.S. retirement system. Since 2019, nearly six million additional small-business workers have gained access, driven by a tight labor market, new tax credits, state mandates, and falling plan costs. Policymakers and new low-cost providers have also made 401(k)s more appealing by simplifying options for employers. (Source: Wall Street Journal)

The Conference Board's CEO Confidence Index rose 11 points in Q1 to 59, marking the biggest increase in three years and returning to net optimism for the first time in a year. CEOs reported improved views of both current conditions and the outlook, and they also indicated an increase in investment spending during the quarter. More than one-third said they are likely to raise their capital-expenditure plans over the next year. This renewed strength in confidence supports a positive outlook for capex growth in 2026. (Source: Ned Davis Research)

Factory orders declined 0.7% in December, largely due to volatile civilian aircraft bookings that pulled down durable goods, while nondurable goods were flat. However, core capital goods orders rose 0.7% for a sixth straight month and were up 6.1% year over year, signaling firm business investment, as inventories and shipments increased modestly and inventory levels remained aligned with demand. (Source: Ned Davis Research)

Investors put a record \$22.3 billion of private credit into emerging markets last year, driven by tighter bank lending and instability in traditionally safe markets. The total was nearly 40% higher than the previous record in 2022, reflecting a broader shift toward emerging-market opportunities as returns in Western markets weaken and default concerns rise. GPCA data also showed overall private capital investment in these regions jumping 33% to \$150.3 billion across private credit, private equity, venture capital, and natural resources funds. (Source: Reuters)



Millions of private-sector workers without employer-sponsored retirement plans could gain access to a new tax-advantaged savings option, President Donald Trump announced in his State of the Union address. The proposed 401(k)-style plan would aim to close what he called a “gross disparity” in retirement access, potentially offering government matching contributions of up to \$1,000 annually. It remains unclear how the proposal would differ from a retirement measure set to take effect next year under legislation passed during Joe Biden’s administration. (Source: Wealth Management)

Since the U.S. Supreme Court struck down many of Trump’s tariffs last Friday, companies have rushed to court seeking refunds, joining hundreds that had already filed in anticipation of the ruling. So far, at least 1,800 companies have brought lawsuits, including major firms such as Costco, Goodyear, and Barnes & Noble, with more added each day. New filings from companies like FedEx suggest a growing wave of litigation. (Source: Wall Street Journal)

The global mergers and acquisitions boom that marked 2025 is continuing into 2026, driven by companies reevaluating their portfolios and rising demand tied to artificial intelligence, even as tighter capital conditions force greater selectivity. After a slow start caused by Trump’s tariffs disrupting deals and public listings early last year, total M&A value jumped nearly 40% to a record \$4.9 trillion in 2025, according to PitchBook. The figure surpassed the previous high set in

2021 as deal activity accelerated with falling interest rates, stronger valuations, and increased corporate investment in AI. (Source: CNBC)

Financial stress is changing how Americans shop and pay, pushing more consumers toward online purchases and digital wallets. Millennials, Gen Z, and households with children feel the most strain, and they are far more likely to shift buying online and rely on digital wallets, which rose from 11% to 15% overall and reached 36% among Gen Z. (Source: PYMNTS)

Many linguists point to the calling of coffee as “joe” as a shortened form of “jamoke,” which is a blend of “java” and “mocha,” two well-known coffee-growing regions. This theory, supported by a 1931 military manual listing “Joe” alongside “Jamoke” and “Java,” suggests the phrase “cup of joe” likely emerged and gained popularity in the 1930s. (Source: Word Smarts)

On March 2, 1965, *The Sound of Music* debuted in U.S. theaters, quickly becoming a global sensation with its mix of soaring music and the real-life story of the Von Trapp family. By year’s end, it had surpassed *Gone With the Wind* as the highest-grossing film in U.S. history and became the first movie to earn over \$100 million, setting box-office records. (Source: Fox News)

Emmett “Branch” McCracken was the youngest coach to win an NCAA title. The young McCracken led Indiana to victory in 1940 at just 31 years old, a record that still stands. He confirmed his coaching talent by guiding the team to a second championship in 1953. (Source: NBA Stuffer)



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