Stocks ended mixed as falling oil prices helped lift the Dow Industrials, while concerns about AI valuation put pressure on the broader market.

The Standard & Poor's 500 Index fell 1.95 percent while the Nasdaq Composite Index skidded 4.60 percent. The Dow Jones Industrial Average rose 0.60 percent. The MSCI EAFE Index, which tracks developed overseas stock markets, lost 1.33 percent.[1,2]

## Dow Industrials Take The Lead

The S&P 500 and Nasdaq indexes were under pressure to start the week as the AI trade and tech more broadly came under scrutiny. But the Dow Industrials made a modest gain for the day.[3]

The rotation away from tech continued Tuesday, with large consumer stocks faring particularly well, which minimized the Dow's decline. The S&P fell about 1.4 percent for the day, while the Nasdaq fell more than 2 percent.[4]

Midweek, stocks were mixed. Healthcare, financial, and industrial sectors carried the Dow to small gains on Wednesday and Thursday. Conversely, continued pressure on tech shares led the S&P and Nasdaq down, albeit at a slower pace than earlier in the week.[5,6]

Then markets flattened out as the week wrapped up. The slow-but-steady Dow logged its 3rd consecutive weekly gain, while the Nasdaq and S&P 500 were under steady pressure during the week.[7]

## Market Insights

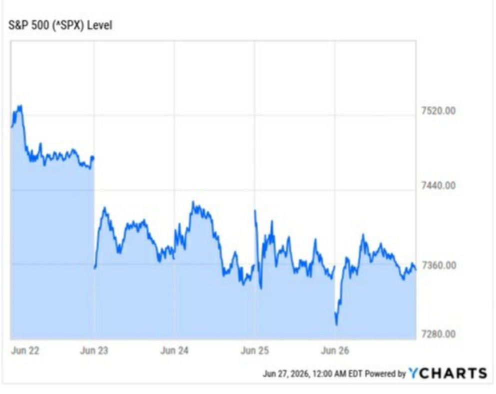
YCHARTS

## Weekly Market Insights (WMI)

### Major Index Return Summary

| Name | 1M TR | YTD TR | 1Y TR | 5Yr TR |
|---|---|---|---|---|
| Dow Jones Industrial Average | 2.85% | 8.91% | 22.82% | 65.87% |
| MSCI EAFE | -0.42% | 9.59% | 23.05% | 55.37% |
| S&P 500 | -1.44% | 8.11% | 22.24% | 84.74% |
| Nasdaq Composite | -3.68% | 9.44% | 27.74% | 83.20% |

### S&P 500 Daily Close




### 10-Year Note Review

| Indicator Name<br>Date | Latest Value | 1M Ago<br>3M Ago<br>1Y Ago | 1M Change<br>3M Change<br>1Y Change |
|---|---|---|---|
| 10 Year Treasury Rate<br>06/26/26 | 4.38% | 4.50%<br>4.42%<br>4.26% | -2.67% ▼<br>-0.90% ▼<br>2.82% ▲ |

Source: YCharts.com, June 27, 2026. Weekly performance is measured from Monday, June 22, to Friday, June 26. TR = total return for the index, which includes any dividends as well as any other cash distributions during the period. Treasury note yield is expressed in basis points.

## Inflation Update

The Fed's preferred measure of inflation, PCE, or the Personal Consumption Expenditures Index, came in as expected for May. While the core number, which excludes energy, was at its highest level since October 2023. However, investors appeared relieved that there were no surprises.[8]

## This Week: Key Economic Data

**Tuesday:** S&P Case-Shiller Home Price Index. Chicago Business Barometer. Consumer Confidence. Job Openings/Labor Turnover.

**Wednesday:** ADP Employment Report. Purchasing Managers Index (PMI)—Manufacturing. Institute for Supply Management (ISM)—Manufacturing. Construction Spending.

**Thursday:** Employment Report. Weekly Jobless Claims. Factory Orders.

Source: Investors Business Daily - Econoday economic calendar; June 26, 2026. The Econoday economic calendar lists upcoming U.S. economic data releases (including key economic indicators), Federal Reserve policy meetings, and speaking engagements of Federal Reserve officials. The content is developed from sources believed to provide accurate information. The forecasts or forward-looking statements are based on assumptions and may not materialize. The forecasts are also subject to revision.

## This Week: Companies Reporting Earnings

**Tuesday:** Nike, Inc. (NKE)

**Wednesday:** General Mills, Inc. (GIS)

Source: Zacks, June 26, 2026. Companies mentioned are for informational purposes only. It should not be considered a solicitation for the purchase or sale of the securities. Investing involves risks, and investment decisions should be based on your goals, time horizon, and risk tolerance. The return and principal value of investments will fluctuate as market conditions change. When sold, investments may be worth more or less than their original cost. Companies may reschedule their earnings reports without notice.

## Food for Thought

*"True originality consists not in a new manner but in a new vision."*

**– Edith Wharton**

## Try It This Way!

## Use AI As Your Personal Tour Guide

Planning a trip, or already on one? AI makes for a surprisingly great tour guide. Try asking something like: **"I'm at [location] — what's the best route to see the highlights, and what's the history behind each one?"** With voice mode enabled, it's like having a knowledgeable companion right in your ear.

Tip adapted from creatoreconomy.so[9]

## 4 Benefits Of Yoga

In addition to helping you finally touch your toes, yoga may confer many other benefits, from helping you relax to even potentially helping your heart health. Below are some other potential benefits of yoga:

- Yoga can decrease stress and promote relaxation. Becoming more in tune with your body and where you hold stress is rewarding.
- Yoga may also be able to relieve anxiety. In one study, 34 women diagnosed with an anxiety disorder participated in yoga classes twice weekly for two months. At the end of the study, those who had practiced yoga had significantly lower levels of anxiety than the control group.
- Yoga may help improve heart health and reduce several risk factors for heart disease. One study found that participants over 40 who practiced yoga for five years had lower blood pressure and pulse rates than those who did not.
- Lastly, yoga may help fight depression; this may be because yoga can decrease cortisol levels, a stress hormone that influences serotonin levels, the neurotransmitter frequently associated with depression.

Tip adapted from Healthline[10]

## Weekly Riddle

What has a foot on each side and yet another foot in its middle?

*Last Week's Riddle: What force and strength cannot get through, it with gentle touch can do. People in many halls would stand were it not in their hand. What is it?*

*Answer: A key.*

## Photo of the Week

*Benidorm*

Alicante Province, Spain

## Footnotes And Sources


1. WSJ.com, June 26, 2026
2. Investing.com, June 26, 2026
3. CNBC.com, June 22, 2026
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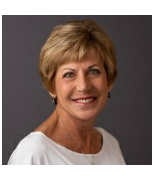


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