

Market Commentary

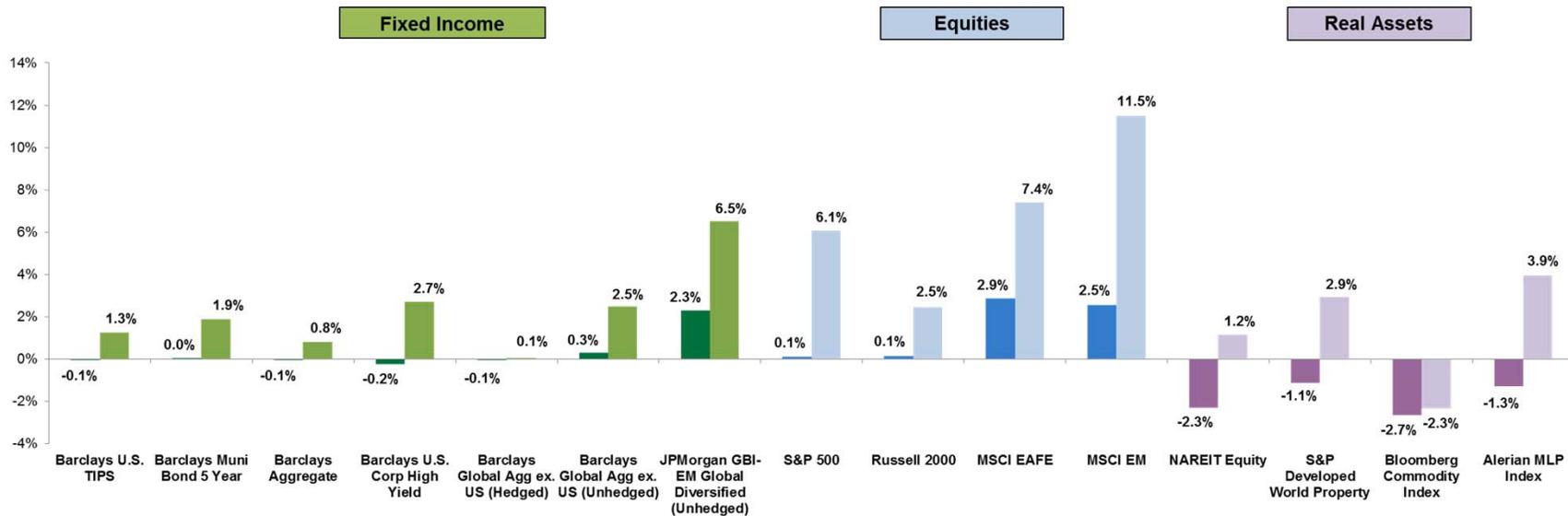
March 2017

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Global Markets Summary

March 2017

Asset Class Returns



Source: Bloomberg

Key: Left Bar: Recent Month
Right Bar: Year-To-Date

Fixed Income

- Domestic and developed international fixed income were little changed as investors continued to focus on policy and central bank action.
- The yield on the 10-Year U.S. Treasury remained flat in March despite an increase in the federal funds rate.
- Shrugging off a stronger dollar, emerging markets debt was still the best performing fixed income asset class.

Equities

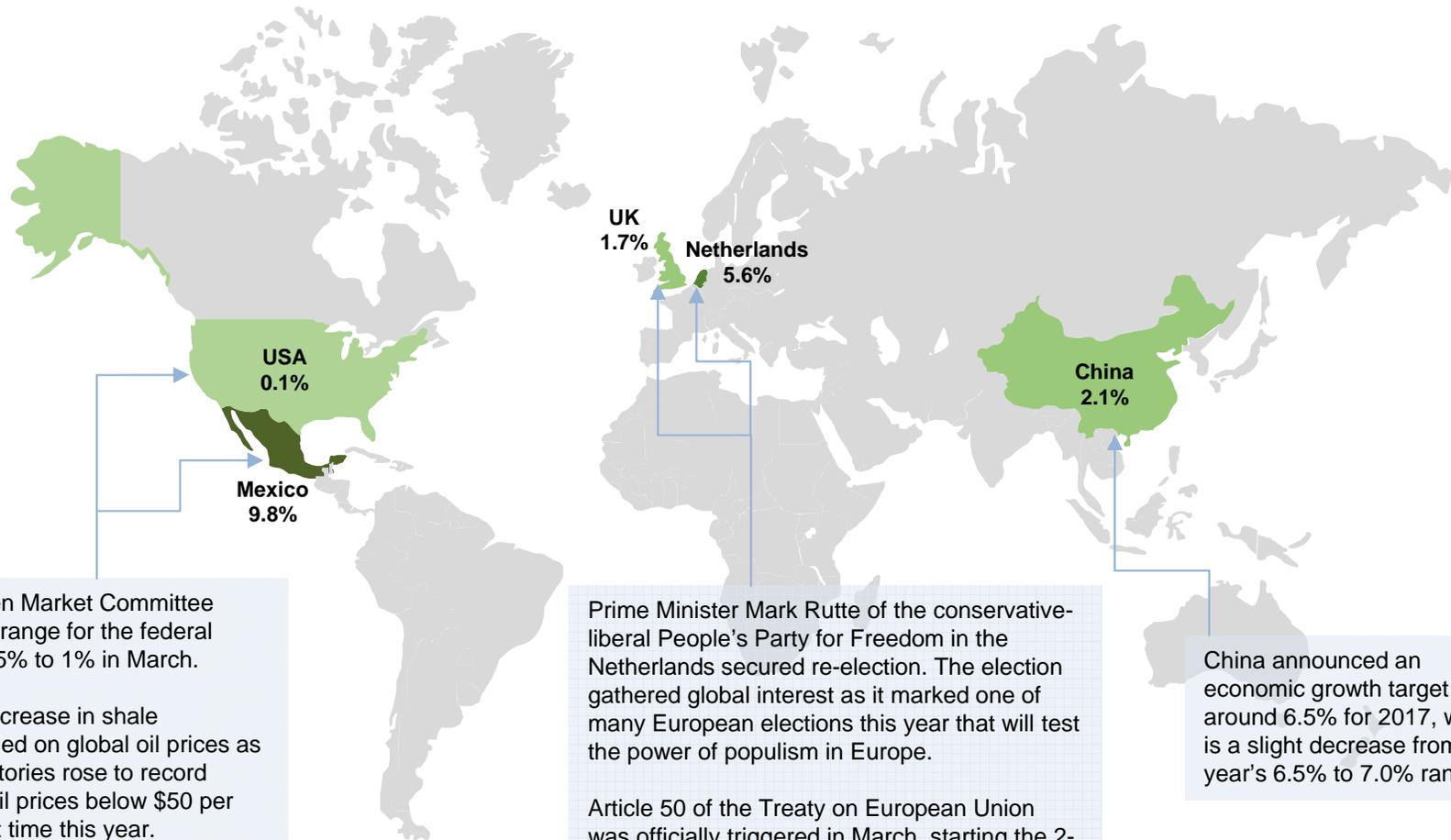
- Domestic equities were flat for the month with growth slightly outperforming value across all market capitalizations.
- Within developed international markets, Europe generally outperformed developed Asia and Latin America.
- Emerging markets continued to move higher as performance was driven significantly by Mexico, India and South Korea.

Real Assets

- Both domestic and global REITs fell as the office and retail sectors declined while the industrial sector held steady.
- Commodities were pressured, pulling year-to-date returns into negative territory due to an increase in U.S. shale production.
- MLPs maintained the strongest start to the year among real assets despite negative returns during the month of March.

Global Highlights

March 2017



The Federal Open Market Committee raised the target range for the federal funds rate to 0.75% to 1% in March.

In the U.S., an increase in shale production weighed on global oil prices as U.S. crude inventories rose to record levels, pushing oil prices below \$50 per barrel for the first time this year.

The Mexican peso strengthened against the U.S. dollar in March following the beginning of a currency hedging program by the Mexican central bank in February.

Prime Minister Mark Rutte of the conservative-liberal People's Party for Freedom in the Netherlands secured re-election. The election gathered global interest as it marked one of many European elections this year that will test the power of populism in Europe.

Article 50 of the Treaty on European Union was officially triggered in March, starting the 2-year withdrawal process by the UK from the European Union.

China announced an economic growth target of around 6.5% for 2017, which is a slight decrease from last year's 6.5% to 7.0% range.

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