

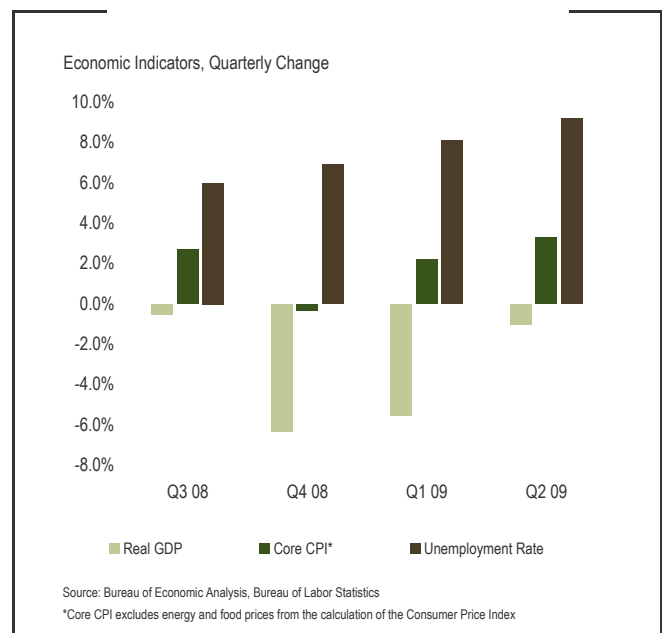
Economic Update

U.S. retailers reported their first monthly sales gain in more than a year in September as shown by a survey of stores open for at least one year, prepared by Thomson Reuters. The 0.6% gain is the first encouraging sign of consumer spending ahead of the holiday shopping season. Of the 30 retailers surveyed, Reuters reported that 18 beat expectations.

Consumer confidence has strengthened in the first week of October as concerns about personal financial situations and employment began to ease, according to the RBC CASH Index. The index, which reflects U.S. consumer attitudes about personal finances, local economies, savings, and the confidence to make large decisions, showed broad-based improvements in consumer sentiment.

The Institute of Supply Management (ISM) announced that its Non-Manufacturing Index reached 50.9% in September, marking expansion in the sector for the first time in a year. Component indexes showed that non-manufacturing business activity also improved last month in addition new orders and employment. ISM asked survey participants about expected benefits from the American Recovery and Reinvestment Act and learned that 14 of the 18 industries surveyed expect to benefit.

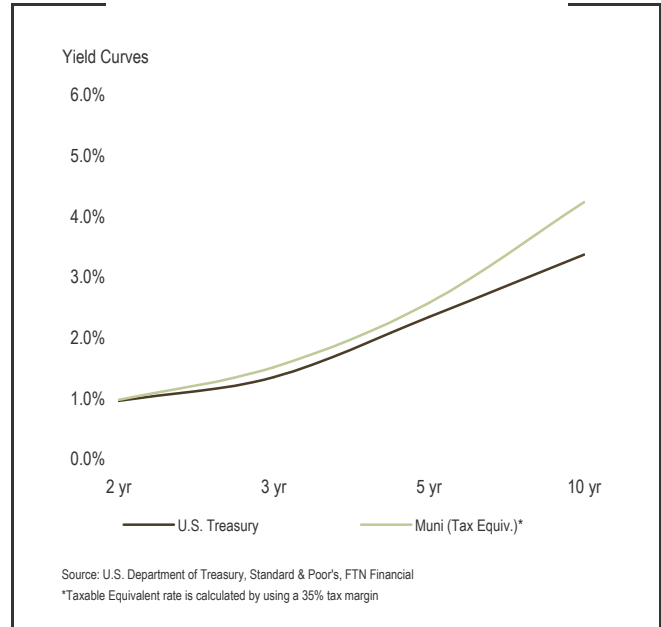
The U.S. Department of Labor announced that initial claims for unemployment benefits declined by 33,000 for the week ending October 3 to 521,000. Although employment is a lagging economic indicator, decelerating initial unemployment claims suggests some stabilization in the jobs market.



Sep. 29 th	ICSC-Goldman Same Store Sales, Wkly. Chg.	0.1%
Sep. 29 th	Consumer Confidence Index, September	53.1
Sep. 30 th	MBA Purchase Applications Index, Wkly. Chg.	-6.2%
Sep. 30 th	EIA Petroleum Status Report, Wkly. Chg.	2.8M Barrels
Sep. 30 th	Domestic Motor Vehicle Sales, September	6.7M
Sep. 30 th	Announced Layoffs, September	66,404
Oct. 1 st	Personal Income, August Monthly Chg.	0.2%
Oct. 1 st	Consumer Spending, August Monthly Chg.	1.3%
Oct. 1 st	Initial Jobless Claims (Week ending 9/26)	551,000
Oct. 1 st	ISM Mfg. Index - Level, September	52.6
Oct. 1 st	Construction Spending, August Monthly Chg.	0.8%
Oct. 1 st	Pending Home Sales, August Monthly Chg.	6.4%
Oct. 1 st	EIA Natural Gas Report, Wkly. Chg.	64 bcf
Oct. 2 nd	Non-farm Payrolls, September Monthly Chg.	-263,000
Oct. 2 nd	Unemployment Rate, September	9.8%
Oct. 2 nd	Factory Orders, August Monthly Chg.	-0.8%

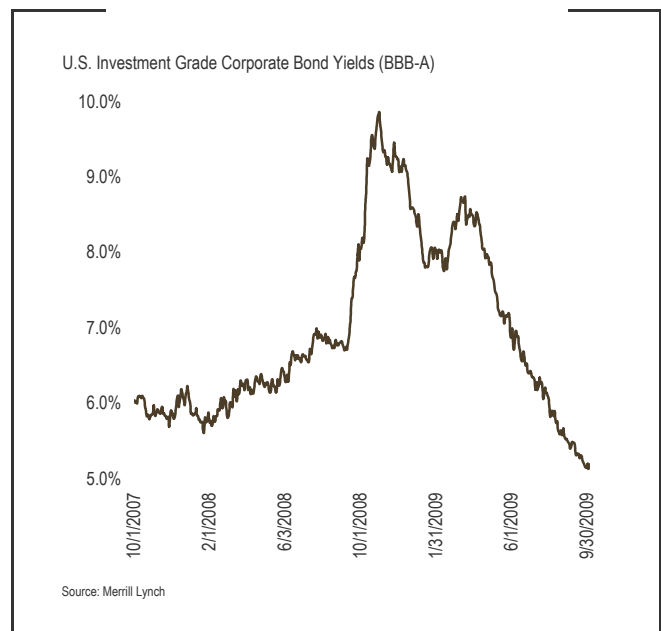
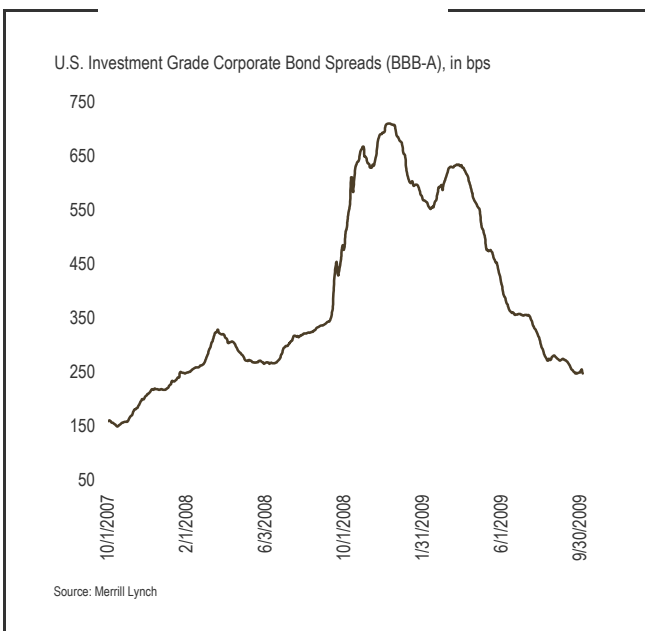
Bond Market Update

U.S. Treasuries fell dramatically for the week, with much of the decline taking place on Friday as Federal Reserve Chairman Ben Bernanke indicated the central bank is ready to tighten monetary policy aggressively once the economic outlook improves. Futures on the Chicago Board of Trade indicate a 43% chance the Fed will raise interest rates by April, relative to 35% odds a month earlier. Thirty-year bonds also fell after Thursday's \$12 billion auction drew below average demand. The bid-to-cover ratio, which gauges demand by comparing total bids with the amount of securities offered, was 2.37, compared with 2.92 at the September auction, according to Bloomberg. Foreign investors bought 34.5% of the bonds versus 46.5% at the last auction and an average of 45.36% at the last five public sales. Meanwhile, investment grade corporate bonds rated BBB and below rallied as many investors feel higher rated debt may have run too far too fast. The spread, or difference in yields, between lower rated investment grade bonds and similar maturity Treasuries narrowed to 305 basis points, only 60 basis points higher than the average in 2007, according to Merrill Lynch. An environment in which the economy continues to improve tends to benefit lower rated corporate bonds as demand for these higher risk securities improves.



Issue	10.2.09	10.9.09	Change
3 month T-Bill	0.10%	0.06%	-0.04%
2-Year Treasury	0.87%	0.97%	0.10%
5-Year Treasury	2.20%	2.35%	0.15%
10-Year Treasury	3.21%	3.38%	0.17%
30-Year Treasury	3.97%	4.22%	0.25%

Source: Bloomberg, FTN Financial, The Wall Street Journal, U.S. Department of Treasury.



Stock Market Update

Stocks broke four sessions of declines from last week and began strongly on Monday, with major indices rising almost 2%. Most of the activity was attributed to traders setting up for positive surprises to the beginning of 3rd quarter earnings announcements scheduled to begin later in the week.

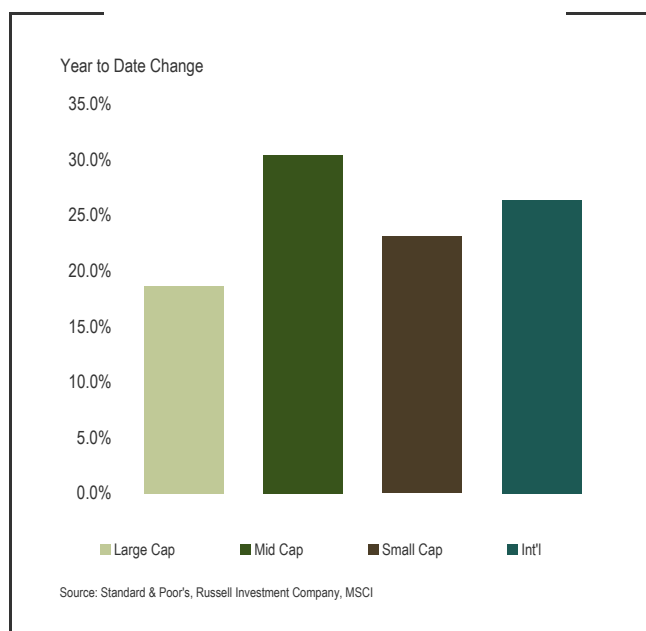
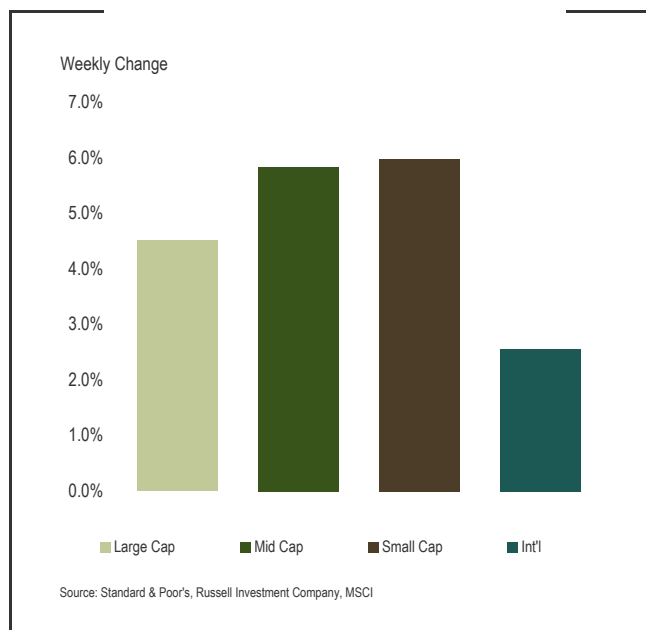
On Tuesday, the Reserve Bank of Australia surprised markets with a 0.25% rate hike. The equity markets interpreted this move as an optimistic sign that the world wide global growth is imminent. On the news, the DJIA rallied 1.4% for the day. Producers of commodities and energy stocks also rallied on the news, with Alcoa (AA), the largest U.S. aluminum producer, rising 3.5%, and the S&P 500 energy sector rose 2.1% as oil prices also rose. On Wednesday, Alcoa Inc. led off the third quarter earnings season with a positive tone. The company cut costs faster than predicted and announced a profit for the third quarter when most analysts predicted a small loss. Alcoa Chief Executive Officer, Klaus Kleinfeld sees end market demand beginning to improve, yet another sign that the economy is has stabilized.

Retailers announced the first rise in same store sales since August 2008 sending Home Depot (HD) and Lowe's (LOW) up 2.87% and the S&P Retail Index up 1.70% on Thursday.

By the end of the week, the DJIA had reached a new high for 2009, closing at 9,864. The DJIA is down nearly 30% from its of 14,164 last seen in October of 2007.

Issue	10.2.09	10.9.09	Change
Dow Jones	9,487.67	9,864.94	3.98%
S&P 500	1,025.21	1,071.49	4.51%
NASDAQ	2,048.11	2,139.28	4.45%
Russell 1000 Growth	561.82	588.02	4.66%
S&P MidCap 400	663.43	702.19	5.84%
Russell 2000	580.2	614.92	5.98%
MSCI EAFE	1,524.76	1,563.81	2.56%
MSCI EM	911.26	939.91	3.14%
MSCI Small Cap	142.21	146.07	2.72%

Prices reflect most recent data available at the time of publication
Source: Bloomberg, Russell Investment Company, Standard & Poor's, Morgan Stanley Capital International, The Wall Street Journal, MarketWatch.



Alternative Investments Market Update

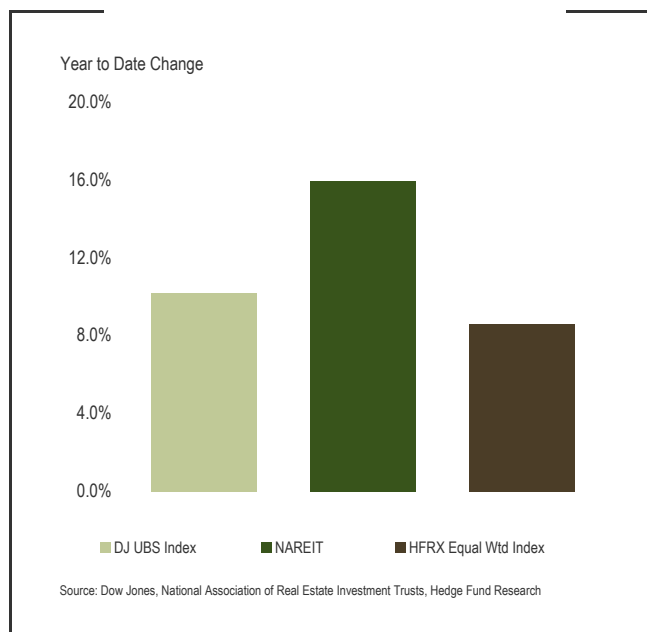
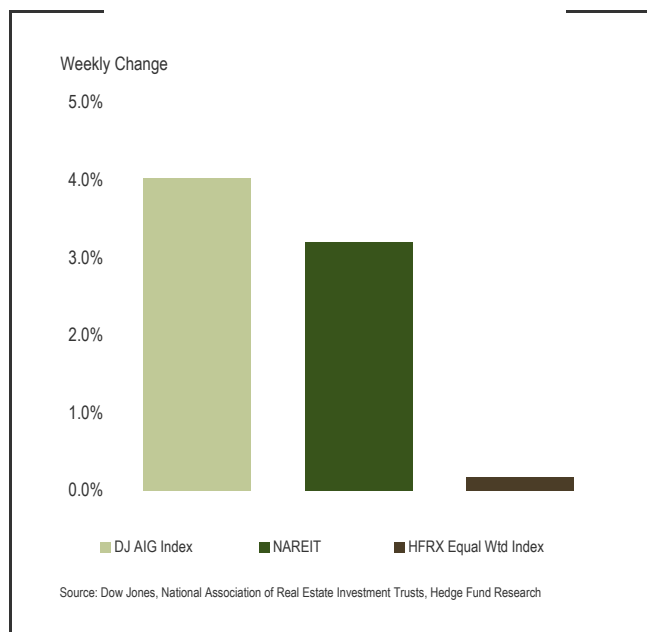
The attention in alternative investments focused on gold and other commodities this week. Following the Bank of Australia's rate hike on Tuesday, gold prices began a strong rally. The rise continued on Wednesday and gold hit an intraday high of \$1,060, closing at a record high of \$1,048, and on Thursday gold closed at another record high of \$1,055. Modest profit taking occurred on Friday, with gold closing at \$1,048. Copper rose 7%, but sugar declined 15%.

Hedge fund Renaissance Technology, one of the largest and most profitable quantitative trading funds, announced that its founder Jim Simons will retire. Renaissance's Medallion Fund has logged one of the most impressive track records in the industry, returning more than 30% annually since inception in 1988, according to a recent Wall Street Journal article.

In another continued sign of gradual thawing in the credit markets, two leveraged buyout deals by private equity firms occurred. Blackstone Group acquired that it is buying the theme park business of Anheuser Busch InBev for \$2.3 billion. Clayton Dubilier & Rice announced an investment of \$477 million in cleaning products company JohnsonDiversey. The notable aspect of each of these deals is that the financing provided was handled by several banks and required both less leverage and a higher equity contribution, compared to just a few years ago when deals like this were funded by just two or three banks.

Issue	Previous Week	Current ¹	Change
Gold	1,004.30	1,048.60	4.41%
Crude Oil Futures	69.95	71.77	2.60%
Copper	2.68	2.84	5.97%
Sugar	23.78	21.24	-10.68%
HFRX Equal Wtd. Strat. Index	1,087.77	1,089.65	0.17%
HFRX Equity Hedge Index	1,119.42	1,125.85	0.57%
HFRX Equity Market Neutral	977.19	976.90	-0.03%
HFRX Event Driven	1,323.01	1,327.90	0.37%
HFRX Merger Arbitrage	1,413.52	1,411.04	-0.18%
Dow Jones UBS Commodity Index	124.17	129.18	4.03%
FTSE/NAREIT All REIT	98.84	102.00	3.20%

¹ Prices reflect most recent data available at the time of publication
Source: Dow Jones, National Association of Real Estate Investment Trusts, Hedge Fund Research, Bloomberg, The Wall Street Journal.



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