

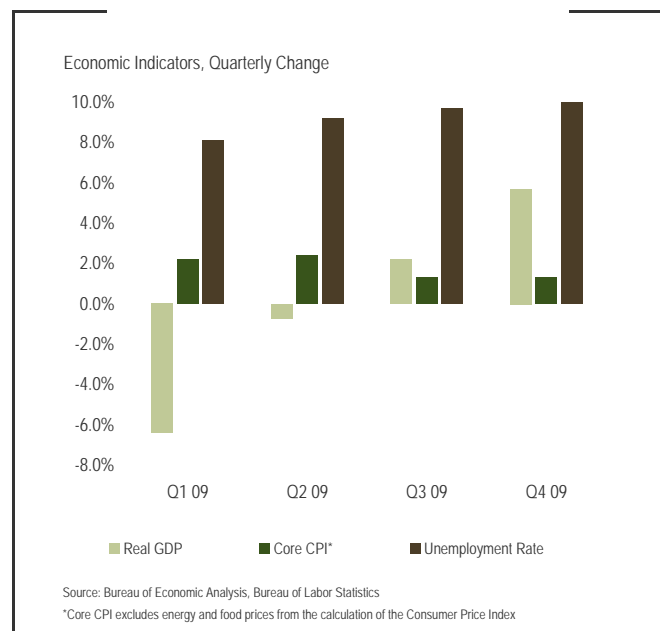
Economic Update

The U.S. economy expanded at a 5.6% annual rate in the fourth quarter, as shown by final gross domestic product (GDP) estimates released by the U.S. Department of Commerce. Data indicated that the increase in GDP largely resulted from private inventory investment, exports, and personal consumption expenditures. The acceleration in economic growth from the third quarter was attributed to the rate that businesses are restocking their inventories which had depleted during the recession. Separately, the report revealed that corporate profits continued to trend higher in the final months of 2009 with pretax profits climbing 8.0% for the quarter. Compared to the fourth quarter 2008, profits surged 30.6%, marking the greatest annual increase in 25 years according to the Wall Street Journal. For the year, corporate profits declined 3.8% from 2008.

The Thompson Reuters/University of Michigan Surveys of Consumers reflected that consumer sentiment remained unchanged in March amid ongoing uncertainties in the labor market and tight credit standards. Despite these challenges, the index of current economic conditions reached the strongest level since March 2008.

The National Association of Realtors (NAR) announced that sales of existing single-family homes edged lower in February, down 0.6% from the previous month to a seasonally adjusted annual rate of 5.02 million units. NAR chief economist Lawrence Yun believes that severe winter weather throughout the month may have played a role in lower demand. Furthermore, Yun noted that while sales have continued to improve since July, "the housing recovery is fragile at the moment." Sales of new single family homes dipped 2.2% in February, a 13.0% decrease from February 2009, according to data released by the Commerce Department.

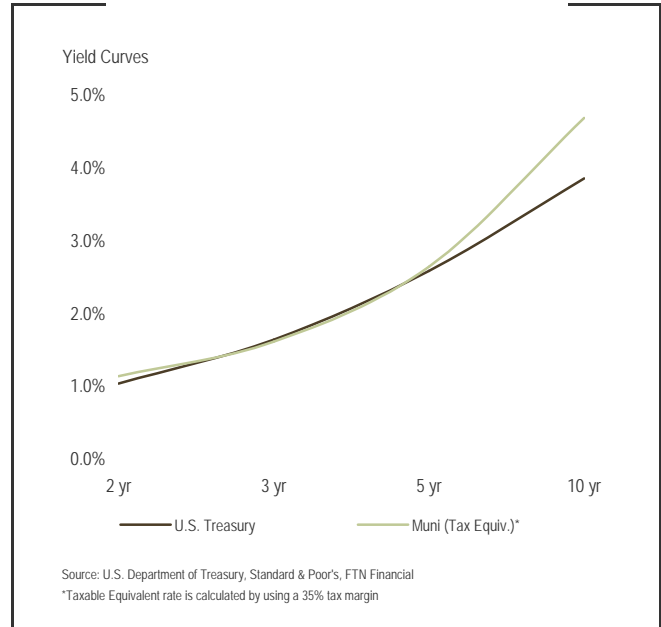
On Thursday, Federal Reserve Chairman Ben Bernanke addressed the Committee on Financial Services about the Fed's exit strategy. Bernanke discussed the special lending facilities that were initiated to help stabilize the financial system and restore private credit. With continued improvements in the economy, the Fed has concluded many of these programs and reiterated its intent to phase out others.



Mar. 23 rd	ICSC-Goldman Same Store Sales, Wkly. Chg.	0.1%
Mar. 23 rd	Existing Home Sales, February SAAR*	5.02M
Mar. 24 th	MBA Purchase Applications Index, Wkly. Chg.	2.7%
Mar. 24 th	Durable Goods New Orders, Feb. Monthly Chg.	0.5%
Mar. 24 th	New Home Sales, February	308,000
Mar. 25 th	Initial Jobless Claims (Week ending 3/20)	442,000
Mar. 25 th	EIA Natural Gas Report, Wkly. Chg.	11 bcf
Mar. 26 th	GDP Price Index, Q4 Quarterly Change SAAR*	0.5%
Mar. 26 th	Real GDP, Q4 Quarterly Change SAAR*	5.6%
Mar. 26 th	After-tax Corporate Profits, Q4 Annual Change	51.8%
Mar. 26 th	Consumer Sentiment Index, March	73.6

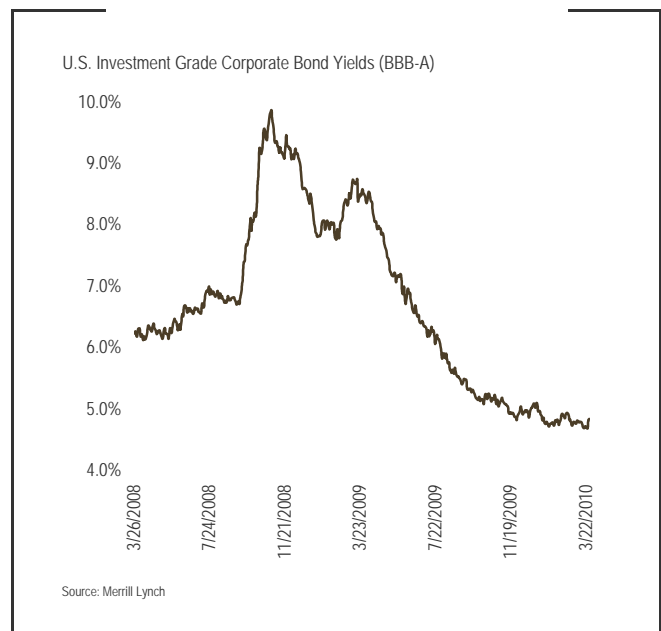
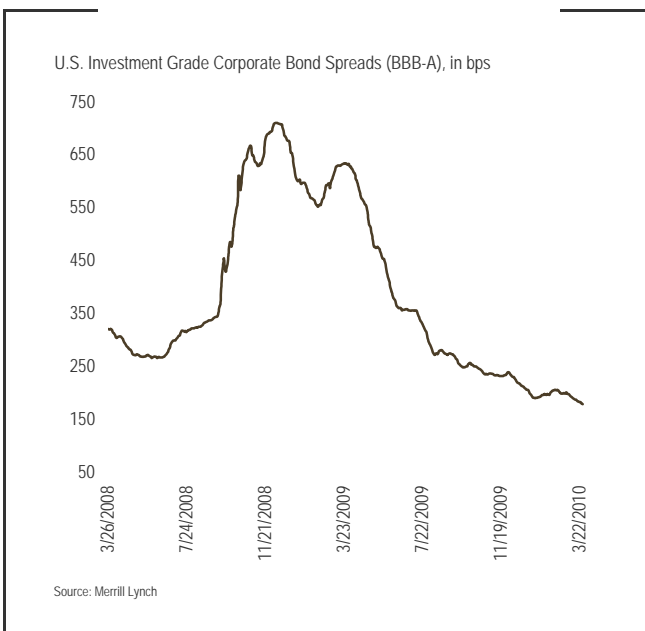
Bond Market Update

After a volatile week, U.S. Treasuries finished lower along the entire yield curve after a series of poorly-bid government debt auctions led to massive selling. A weak Treasury auction rekindled fears over a growing budget deficit, especially after the benchmark 10-year note began trading at a discount to similar maturity interest rate swaps for the first time since 1988. Interest rate swaps have historically held yield premiums over Treasuries, reflecting the risk of the potential default involved in financial contracts between private counterparties. Narrowing swap spreads are consistent with a greater appetite for risk since the ample liquidity supplied to the financial markets by the Federal Reserve has had investors searching for higher yields, according to Reuters. Stronger than expected economic data, with the exception of housing, also added pressure to the bond market, and lent further support to higher-risk securities at the expense of safe-haven Treasuries. The three-decade rally in Treasuries may have run its course according to Bill Gross at PIMCO. "Bonds have seen their best days," he said in an interview yesterday, and will focus on spread products going forward.



Issue	3.19.10	3.26.10	Change
3 month T-Bill	0.16%	0.14%	-0.02%
2-Year Treasury	0.98%	1.04%	0.06%
5-Year Treasury	2.44%	2.59%	0.15%
10-Year Treasury	3.68%	3.86%	0.18%
30-Year Treasury	4.59%	4.75%	0.16%

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



Stock Market Update

Stocks posted gains for the fourth straight week, the longest such streak since last August. The Dow Jones Industrial Average (DJIA) gained 108.38 points, or 1.01%, to end the week at 10,850.36. The broader S&P 500 closed Friday at 1,166.59, little changed for the day but up 13.7 points, or 1.19%, for the week. The technology-heavy NASDAQ Composite gained 1.57% this week to close at 2,395.13.

Shares of Best Buy Co. (BBY) surged 3.5% on Thursday when the electronics retailer upped its fiscal 2011 earnings per share guidance to between \$3.45 and \$3.60 a share. The increase exceeds analysts' prior expectations of \$3.36 a share, according to MarketWatch.com.

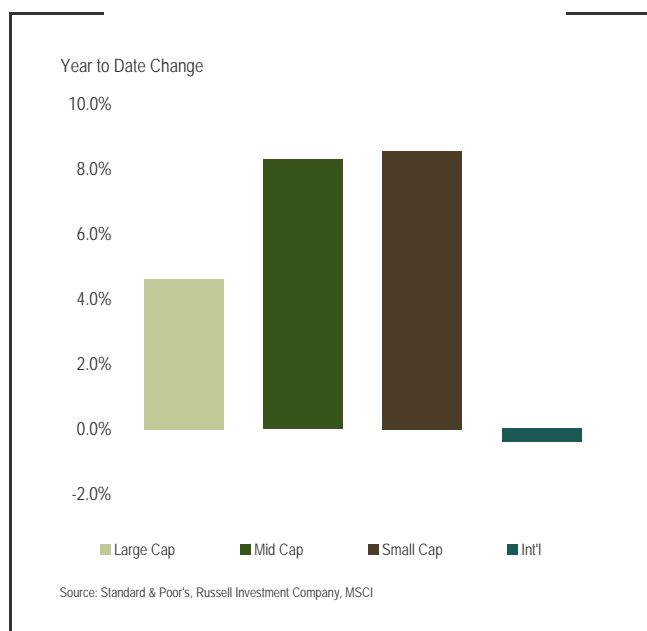
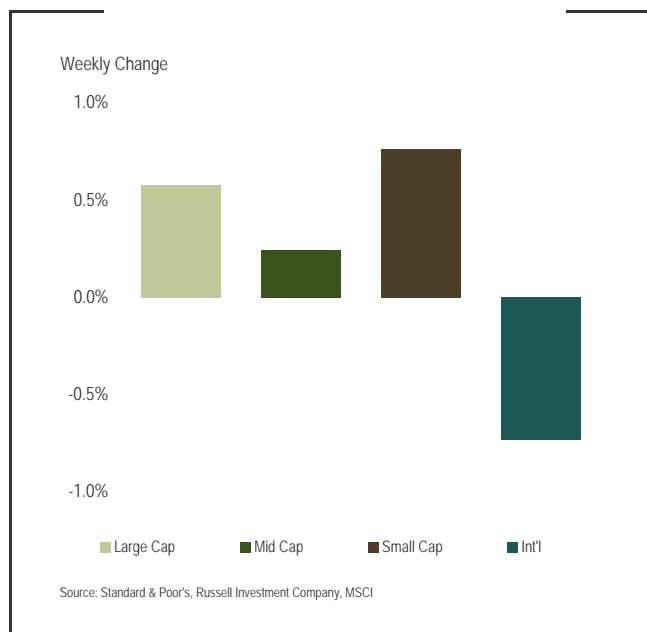
Technology stocks slipped on Friday dragged down by disappointing quarterly results from Oracle Corp (ORCL). The software maker said its net income for its fiscal third quarter was 23 cents a share, shy of the 38 cents expected by analysts, according to MarketWatch.com. Oracle shares fell 1.34% on Friday on the news.

Energy stocks posted a 2.09% decline for the week, the worst performance of the S&P 500 sectors, on falling natural gas prices. Consumer discretionary stocks posted a gain of 2.04% on a slight improvement in consumer sentiment numbers reported by the Reuters/University of Michigan.

International stocks breathed a sigh of relief on news that stocks rallied when European leaders announced that they would stand ready to aid Greece should the troubled country need help to meet its financial obligations. The FTSE 100 gained 0.94% for the week.

Issue	3.19.10	3.26.10	Change
Dow Jones	10,741.98	10,850.36	1.01%
S&P 500	1,159.90	1,166.59	0.58%
NASDAQ	2,374.41	2,395.13	0.87%
Russell 1000 Growth	517.53	519.95	0.47%
S&P MidCap 400	785.13	787.02	0.24%
Russell 2000	673.85	678.97	0.76%
MSCI EAFE	1,578.60	1,567.06	-0.73%
MSCI EM	1,001.51	989.95	-1.15%
MSCI Small Cap	147.25	146.30	-0.64%

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

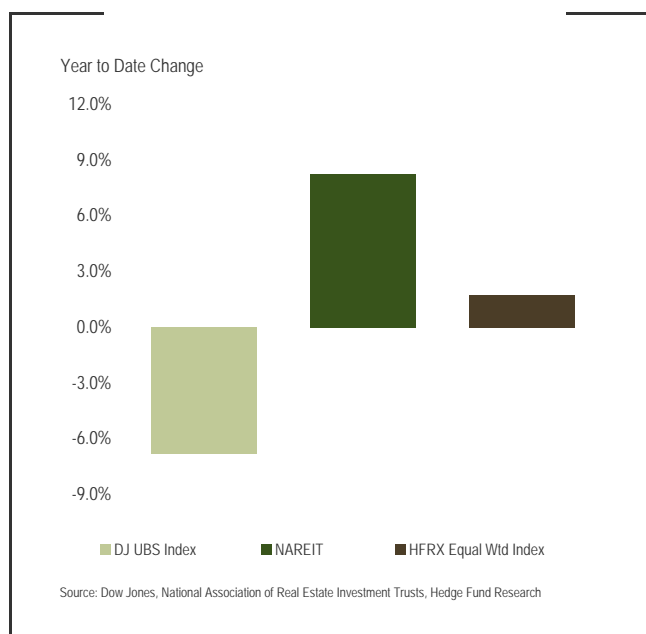
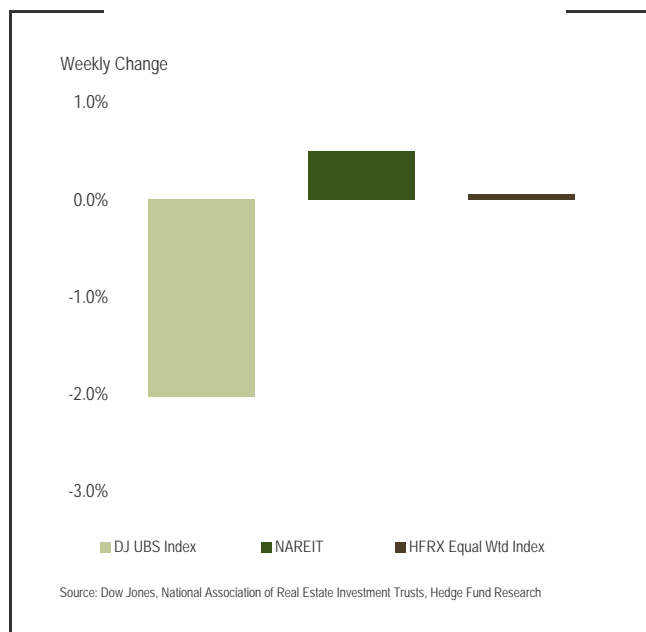
Along with weaker U.S. Treasury debt auctions and gradually up trending equity markets, alternatives reflected a growing unease about government deficits and global growth opportunities. Gold whipsawed back and forth between \$1,100 and \$1,000 on alternating news that Greece's debt concerns were affecting Europe, forcing a flight from Euros to U.S. dollars, in turn pushing gold down. The reverse ensued later in the week following news that Germany reconsidered providing aid to Greece, causing gold to rise. The Fed announcements also caused gold to climb as a potential defense against inflation as investors believe rates will stay near zero in the near future. As the dollar continued to trend higher, which tends to push commodity prices like gold and oil lower, a mid week announcement that crude inventory stockpiles rose by an unexpected 7.25 million barrels, well above the 1.4 million expectation, sent oil tumbling by 1.6%. Oil keeps trying to trade above \$80, but negative news releases continue to thwart its efforts.

The Institutional Limited Partners Association, a group of large institutional private equity investors, outlined a series of reforms to fees and operational transparency they expect operators of private equity partnerships to undertake. A potential stand off between limited and general partners may be an important development as the year progresses.

In real estate, World Trade Center developer Larry Silverstein has finally reached an agreement with the governments of New York and New Jersey to settle terms for the financing and redevelopment and hopes to begin work soon.

Issue	Previous Week	Current ¹	Change
Gold	1,106.30	1,108.50	0.20%
Crude Oil Futures	80.47	80.15	-0.40%
Copper	337.10	341.75	1.38%
Sugar	18.64	17.00	-8.80%
HFRX Equal Wtd. Strat. Index	1,130.60	1,131.25	0.06%
HFRX Equity Hedge Index	1,138.36	1,137.17	-0.10%
HFRX Equity Market Neutral	992.35	993.43	0.11%
HFRX Event Driven	1,376.82	1,376.87	0.00%
HFRX Merger Arbitrage	1,469.63	1,469.99	0.02%
Dow Jones UBS Commodity Index	132.38	129.70	-2.02%
FTSE/NAREIT All REIT	121.01	121.61	0.50%

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, The International Monetary Fund.



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