

WEEKLY MARKET COMMENTARY

For the Week of May 4, 2015

THE MARKETS

U.S. stocks rebounded Friday. The rally was attributed to investors taking advantage of reduced healthcare and technology shares, along with April's positive data suggesting the U.S. economy was improving. For the week, the Dow fell -0.31 percent to close at 18,024.06. The S&P lost -0.42 percent to finish at 2,108.29 and the NASDAQ dropped -1.70 percent to end the week at 5,005.39.

Returns Through 05/01/15	1 Week	YTD	1 Year	3 Year	5 Year
Dow Jones Industrials (TR)	-0.31	1.81	11.39	13.49	13.22
NASDAQ Composite (PR)	-1.70	5.69	21.27	17.95	15.25
S&P 500 (TR)	-0.42	3.03	14.22	16.93	14.57
Barclays US Agg Bond (TR)	-0.92	0.91	3.89	2.54	4.05
MSCI EAFE (TR)	-0.90	8.85	1.01	11.20	7.34

Source: Morningstar.com. *Past performance is no guarantee of future results. Indexes are unmanaged and cannot be invested into directly. Three- and five-year returns are annualized. The Dow Jones Industrials, MSCI EAFE, Barclays US Agg Bond and S&P, excluding "1 Week" returns, are based on total return, which is a reflection of return to an investor by reinvesting dividends after the deduction of withholding tax. The NASDAQ is based on price return, which is the capital appreciation of the portfolio, excluding income generated by the assets in the portfolio in the form of interest and dividends. (TR) indicates total return. (PR) indicates price return. MSCI EAFE returns stated in U.S. dollars.

Shoulda Coulda Woulda — Of adults at least age 55, 68 percent admit that they procrastinated before beginning their retirement planning (source: Financial Engines, BTN Research).

May Day — The average total return for the S&P 500 during the month of May since 1990 has been a gain of 1.22 percent the sixth best performing month over the 25-year period. The S&P 500 consists of 500 stocks chosen for market size, liquidity and industry group representation. It is a market value weighted index with each stock's weight in the index proportionate to its market value (source: BTN Research).

Almost Nothing Saved — Of more than 2,000 Americans surveyed (half retired and half working), 57 percent have accumulated less than \$25,000 for their retirement years (source: Employee Benefit Research Institute, BTN Research).

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WEEKLY FOCUS – Cashing in on Collectables

“May the fourth be with you.” You might hear that phrase once or twice today as fans celebrate the unofficial Star Wars day holiday with a play on the popular reference: “May the force be with you.” Star Wars may be a movie from your youth, but with the new film “Star Wars VII: The Force Awakens” coming to theaters this winter, you’ll likely see advertisements, endorsements and merchandise from the franchise popping up more regularly. And some of that memorabilia – posters, toys, figurines, etc. – could earn you top dollar.

The Star Wars franchise has produced some of the most sought-after items for professional collectors worldwide. Vintage toys still in their original packaging and untouched by children can be sold for hundreds to thousands of dollars. A single original Star Wars character Pez dispenser in the box, for example, averages \$400-500. The same is true of many Disney items, Barbies and more.

Other vintage items such as antique jewelry, original vinyl albums, books, comic books, coins, sports trading cards, furniture – even pottery and porcelain – could be worth money. Even your seemingly simple collection of stamps, Christmas ornaments or snow globes could have a valuable hidden gem or two.

No matter if the now-vintage items you have were bought solely for personal entertainment or as a purposeful collection with the intent to re-sell later, you may be surprised by the value your trinkets have today. An example of a popular collector’s item that usually isn’t worth much would be Beanie Babies. First released in 1993, collectors flocked to own as many of these plush animals as possible, which only increased the demand and their production. Since so many people purchased Beanie Babies, their value remains relatively the same as their original purchase price. Rare exceptions do occur. Original prototypes, early Beanie Babies with manufacturing defects and an original Princess bear could still fetch a couple thousand dollars.

Whether you’re just cleaning out your attic or you’re sorting through a relative’s estate, it could be worth the time and the effort to have some of those items appraised before deciding how to dispose of them. And if you find something of value, we can help you determine the best way to proceed – whether to keep in the family, sell or give away. We can work with your estate planning and tax professionals to help you make the right decisions for your collectibles.



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* The Standard & Poor’s 500 (S&P 500) is an unmanaged group of securities considered to be representative of the stock market in general. The Dow Jones Industrial Average is a price-weighted index of 30 actively traded blue-chip stocks. NASDAQ Composite Index is an unmanaged, market-weighted index of all over-the-counter common stocks traded on the National Association of Securities Dealers Automated Quotation System. The Morgan Stanley Capital International Europe, Australia and Far East Index (MSCI EAFE Index) is a widely recognized benchmark of non-U.S. stock markets. It is an unmanaged index composed of a sample of companies representative of the market structure of 20 European and Pacific Basin countries and includes reinvestment of all dividends. Barclays Capital Aggregate Bond Index is an unmanaged index comprised of U.S. investment-grade, fixed-rate bond market securities, including government, government agency, corporate and mortgage-backed securities between one and 10 years. Written by Securities America. SAI#1189637.1