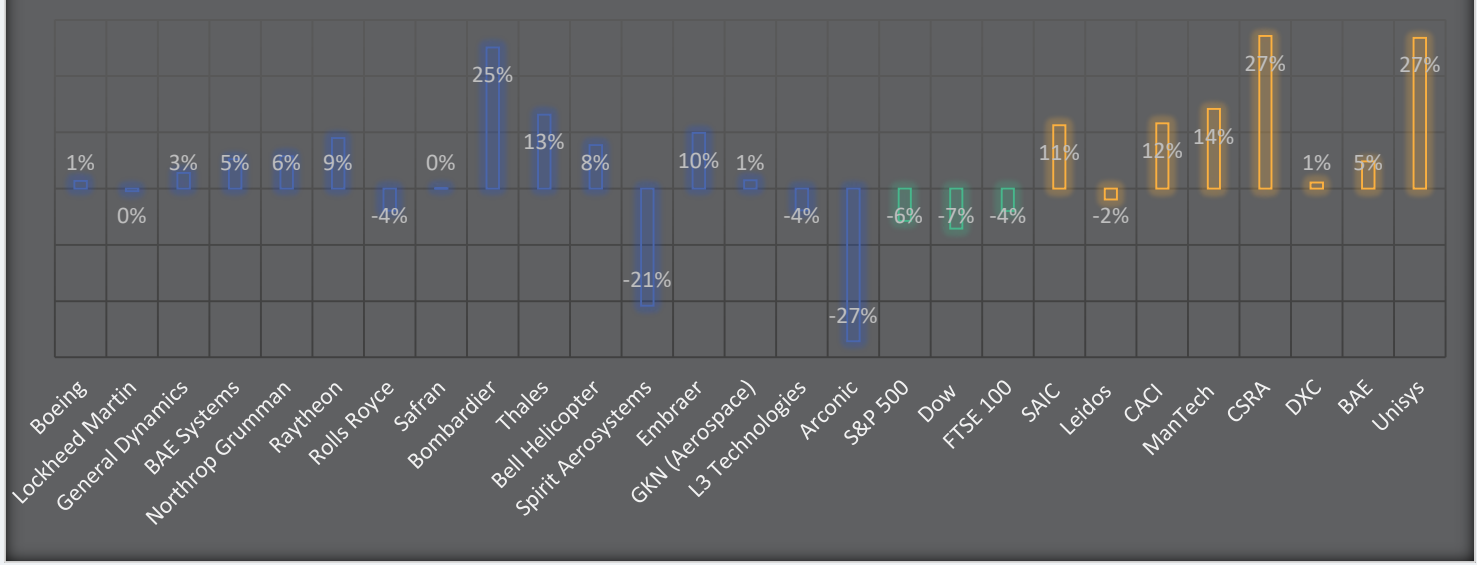




Global Aerospace, Defense & Intelligence Hiring Index

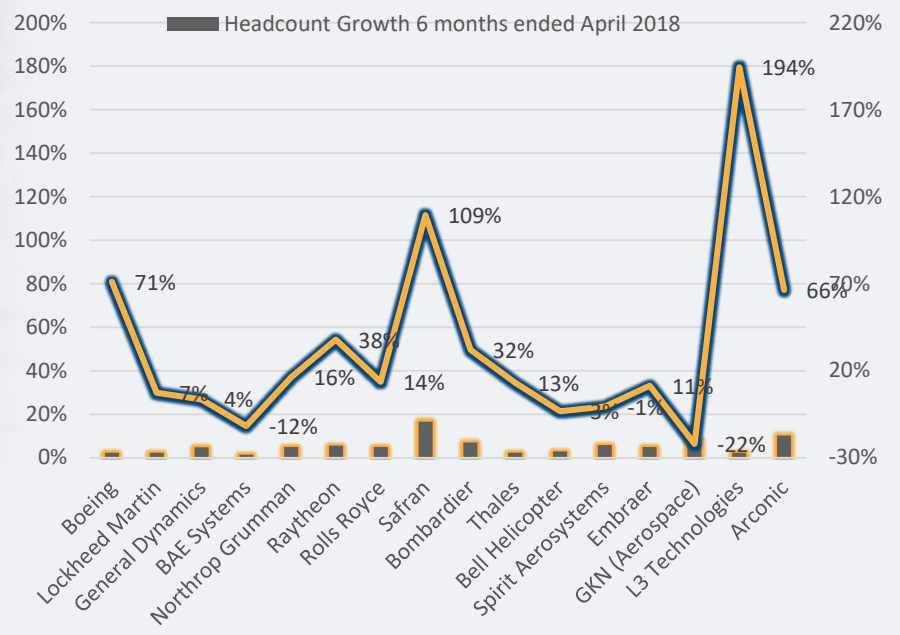
The weather is finally heating up, which is a good metaphor for the aerospace and defense sector, which, is still quite hot with activity outpacing other industries and the S&P500. As you will see from our analysis below the pace of hiring and growth in our industry shows a bullish optimism.

Stock Price change January 2018 to April 2018



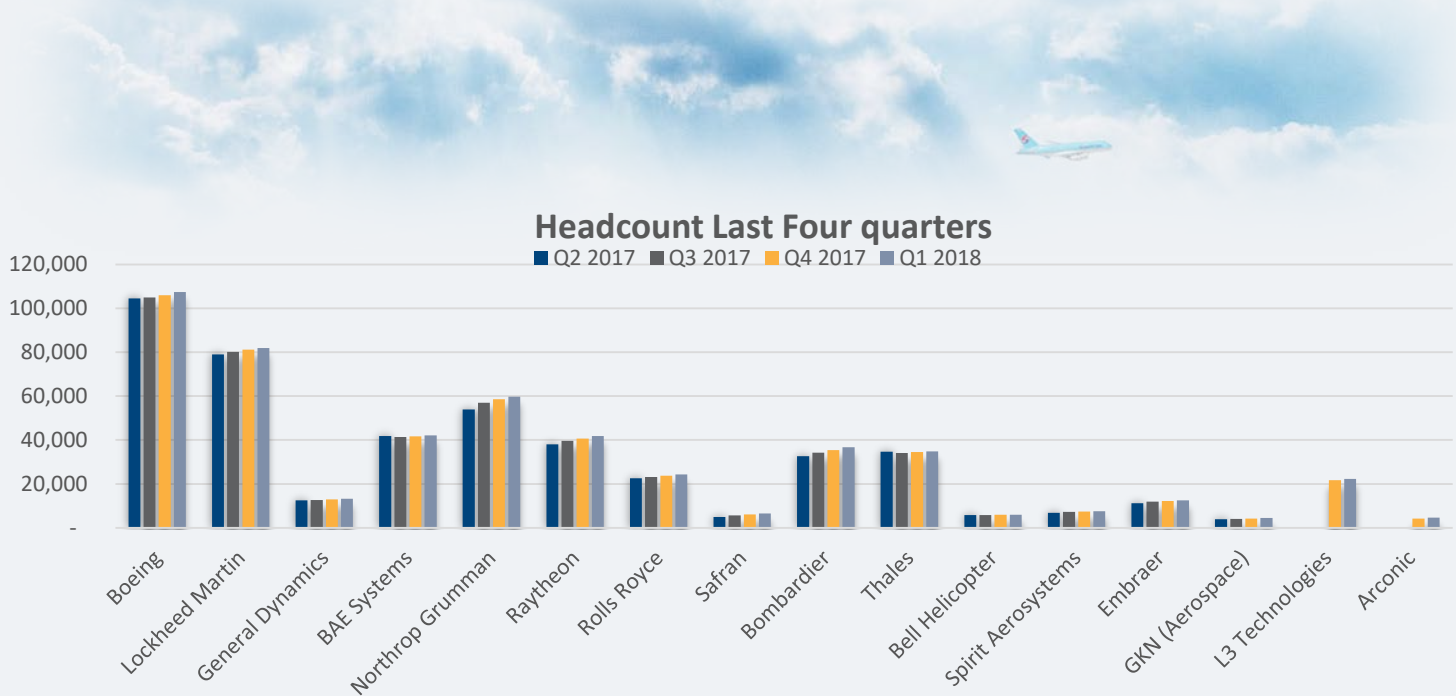
Our comparative analysis of stock price changes from S&P 500, Dow and FSTE shows that the stock market continues to reward the majority of the Aerospace and Defense Players through April of 2018 (diagramed below).

Aerospace and Defense Company Growth Paths Q1 2018



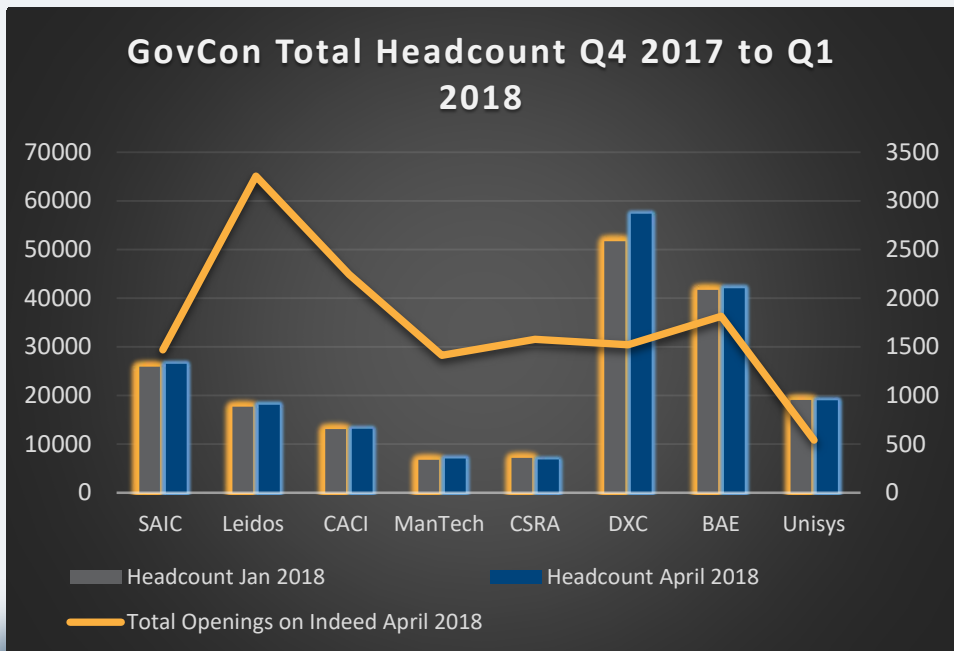
Global Aerospace, Defense & Intelligence Hiring Index

All companies tracked on our index show headcount growth over the past six months, with Safran showing the greatest amount. Safran is a good example of how data can be deceiving, however, as this bump is likely influenced by its acquisition of Zodiac. An analysis of internet job postings shows us that BAE and GKN have significantly slowed hiring, while L3, Boeing, Safran and Arconic have significantly increased the pace of their hiring. BAE and GKN are likely experiencing the after effects of Brexit.



The chart above reflects growth over the past year, and with the exception of Thales and BAE, the growth has been continuous. L3 and Arconic have been added to our tracking as other companies have merged with one another.

Within the GovCon sector, we see some growth, but the majority of the big firms remain about the same. More substantial growth seems to be occurring within small and mid-size firms, which we note through recent search activity instead of publicly available information.



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