Chart Collection for Morning Briefing

Yardeni Research, Inc.

January 3, 2018

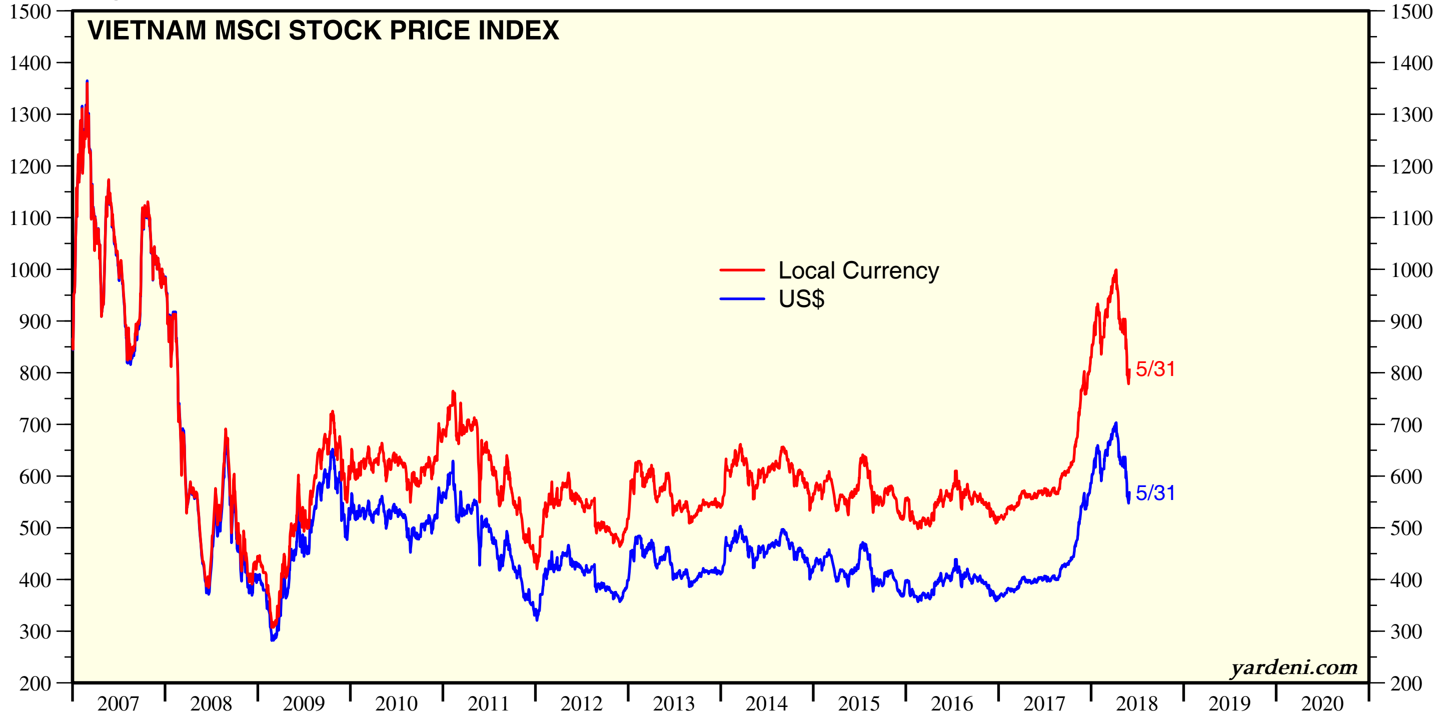
Dr. Edward Yardeni
516-972-7683
eyardeni@yardeni.com

Mali Quintana
480-664-1333
aquintana@yardeni.com

Please visit our sites at
www.yardeni.com
blog.yardeni.com

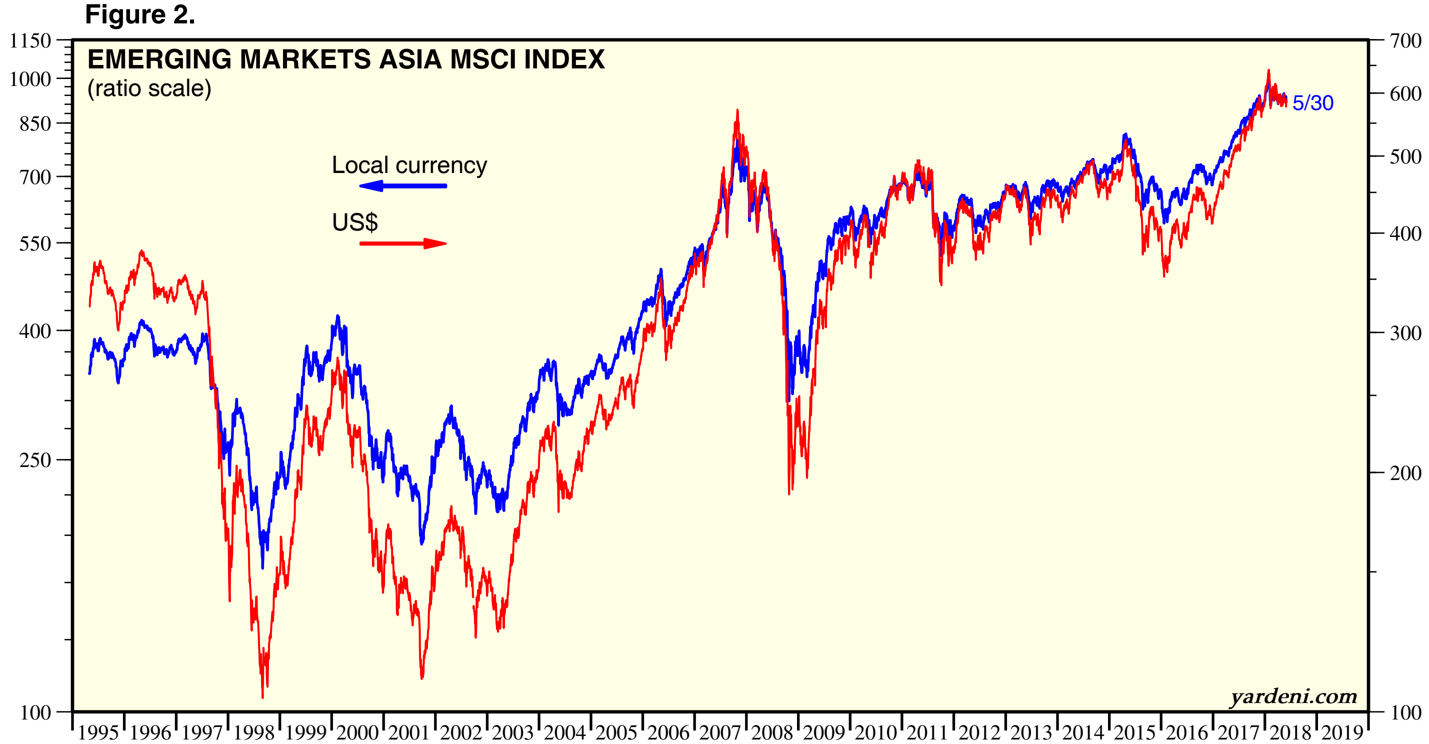
thinking outside the box

Figure 1.



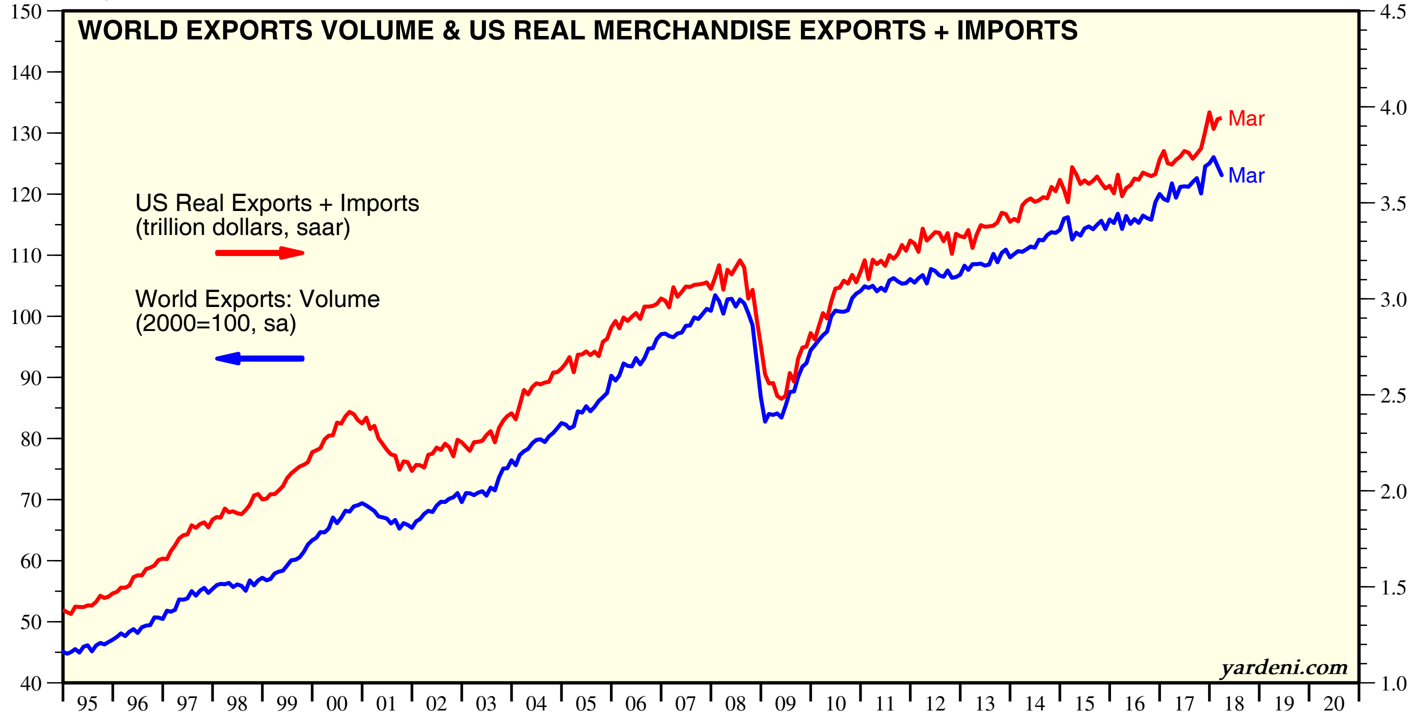
Source: MSCI.

Figure 2.



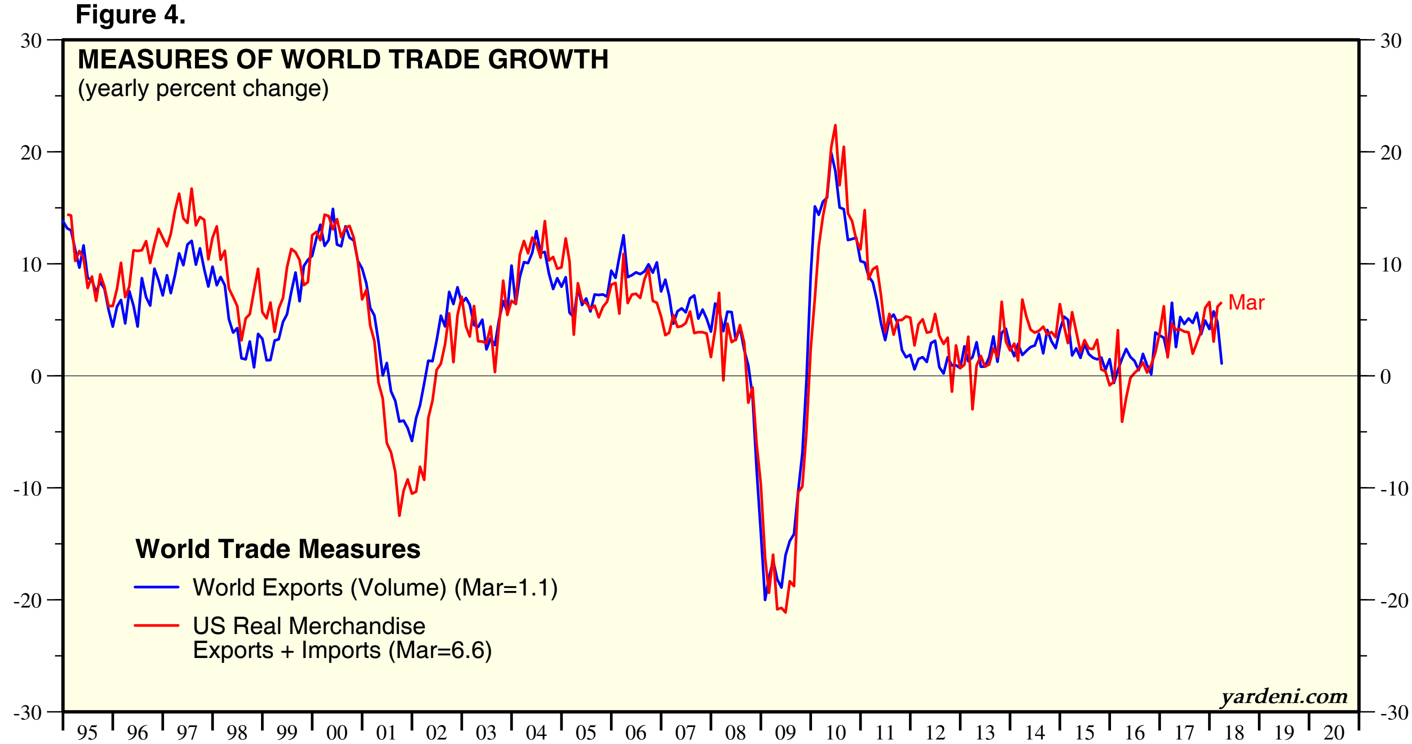
Source: MSCI.

Figure 3.



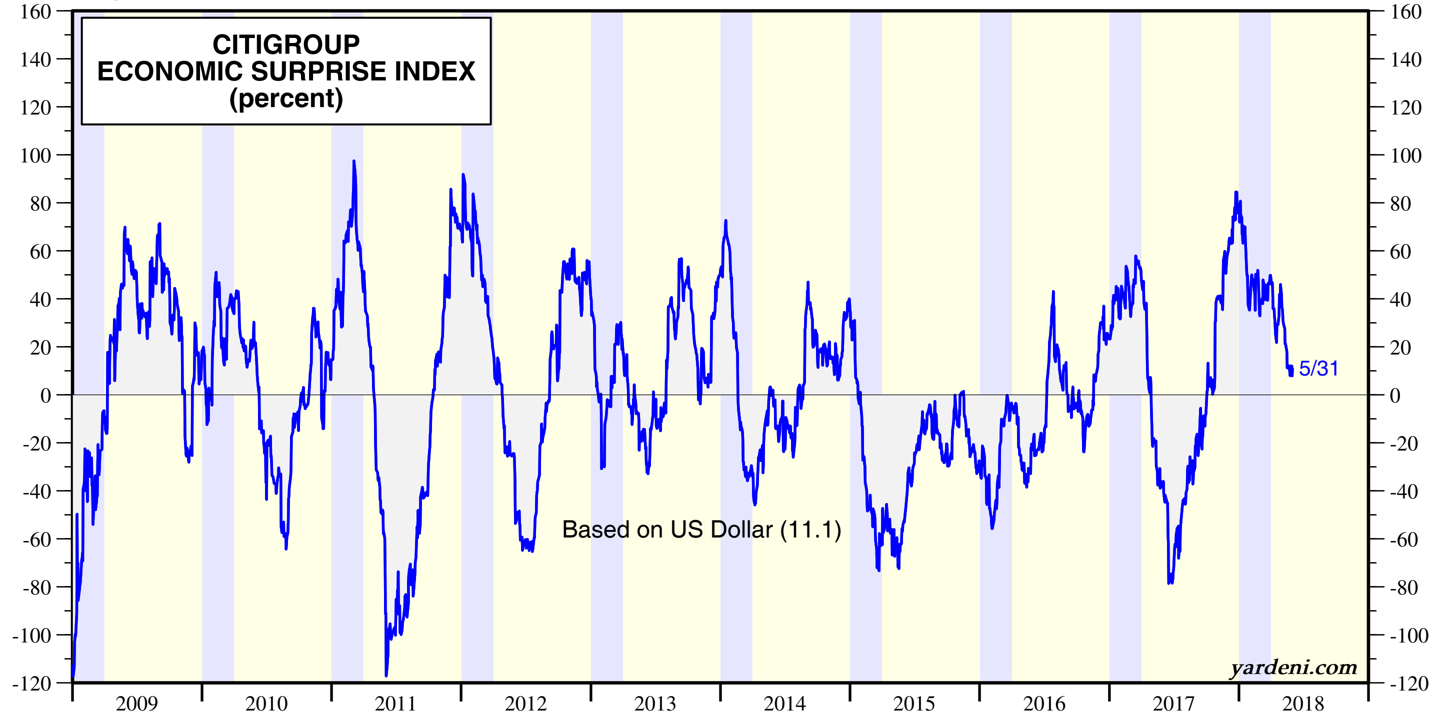
Source: CPB Netherlands Bureau for Economic Policy and Bureau of Economic Analysis.

Figure 4.



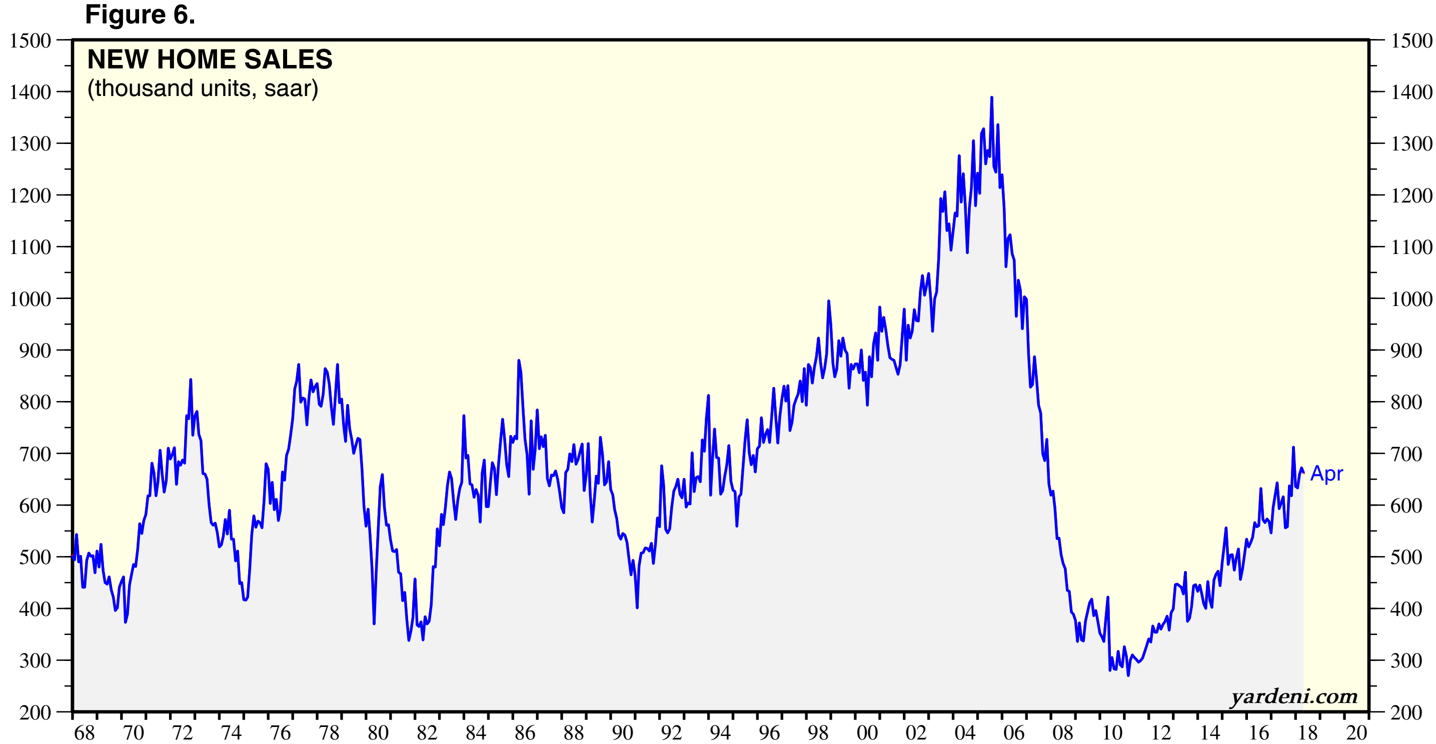
Source: CPB Netherlands Bureau for Economic Policy and Bureau of Economic Analysis.

Figure 5.



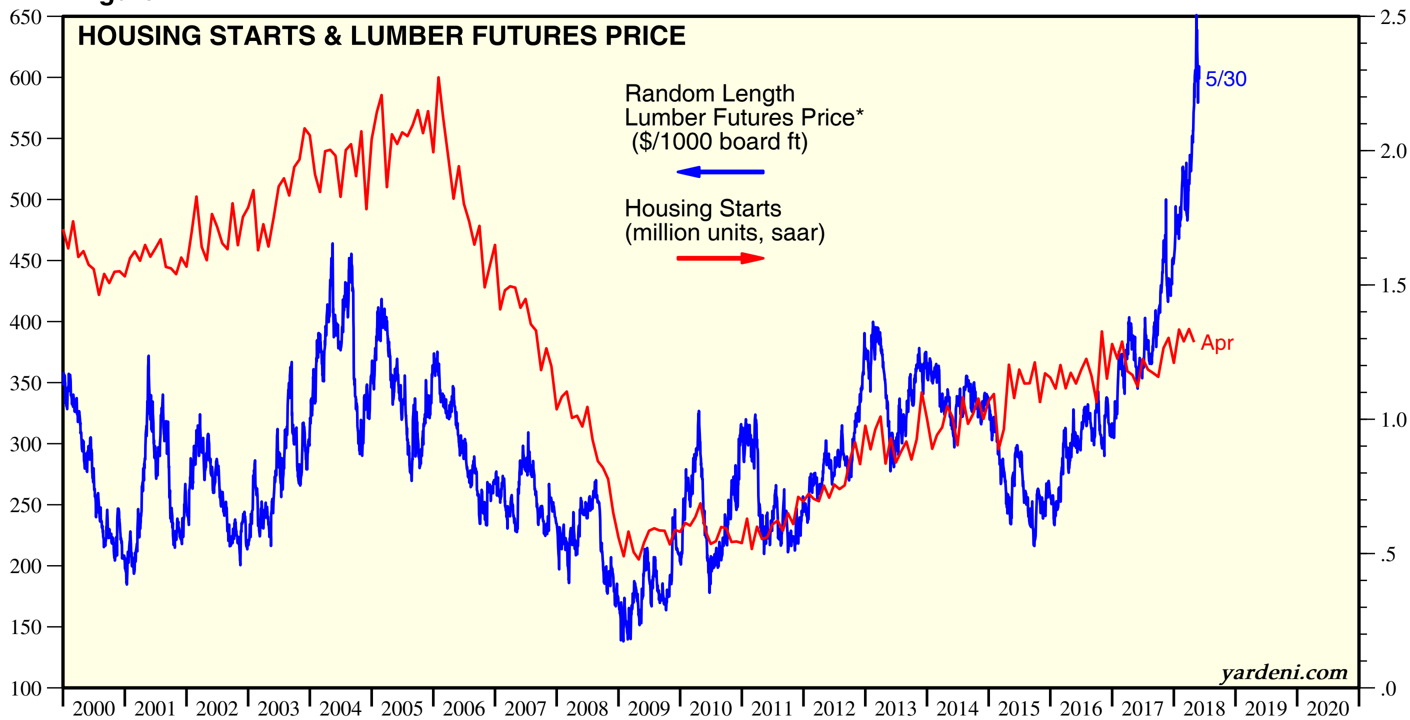
Note: Blue shaded areas denote first quarter of each year.
Source: Citigroup.

Figure 6.



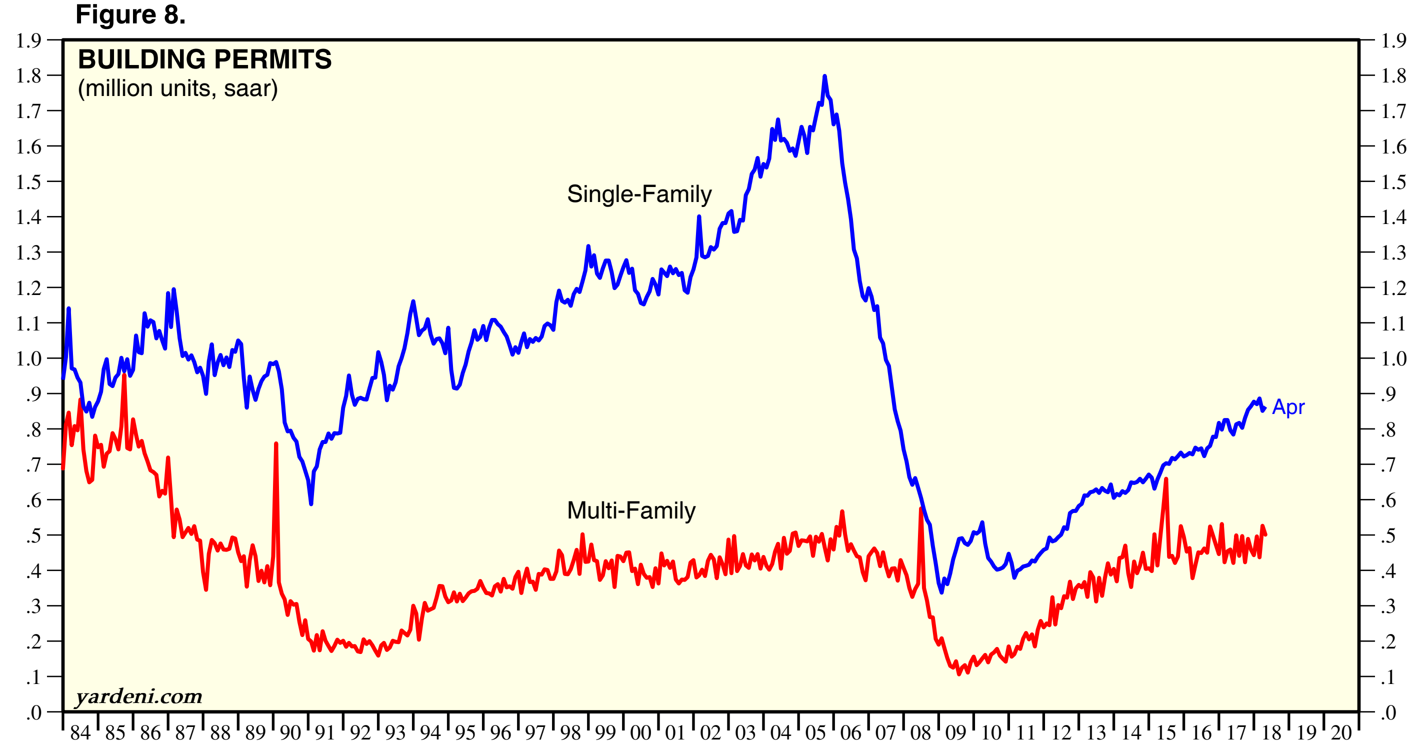
Source: Census Bureau.

Figure 7.



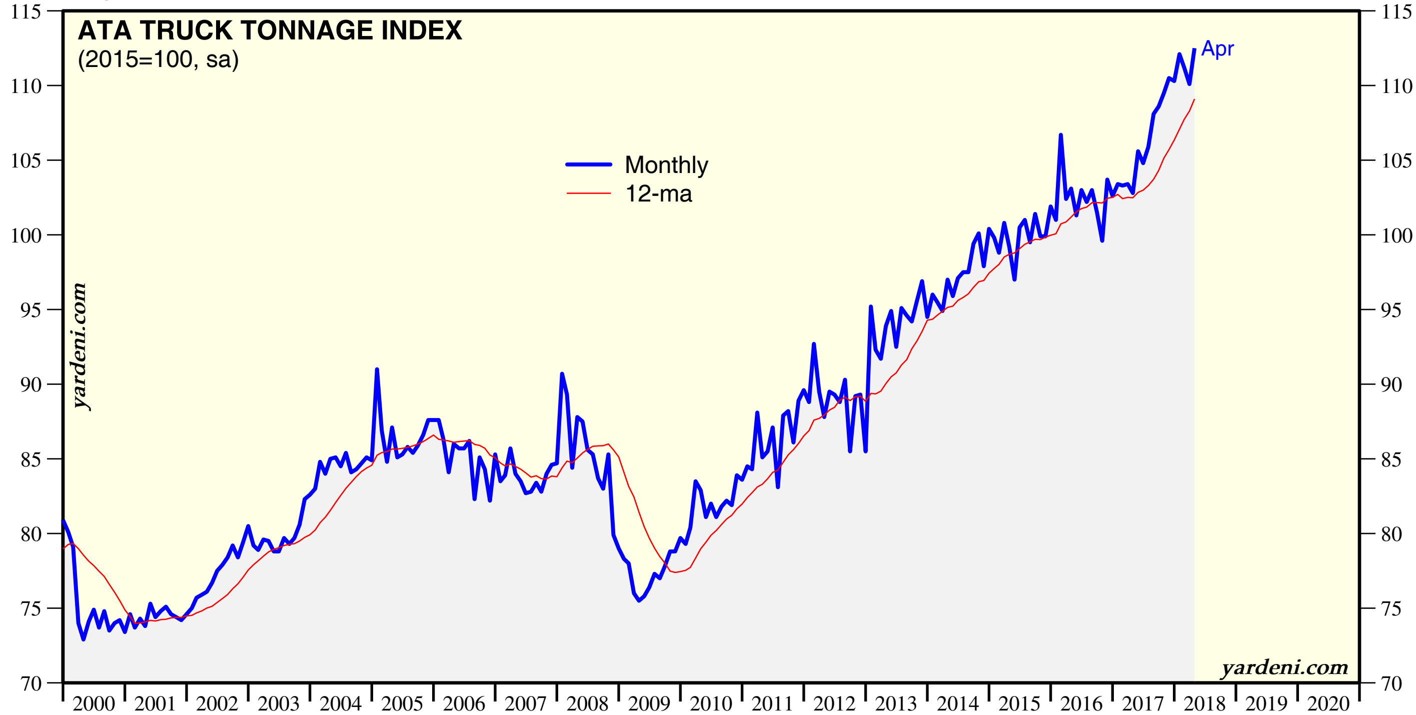
* Nearby contract.
Source: Census Bureau and Chicago Mercantile Exchange.

Figure 8.



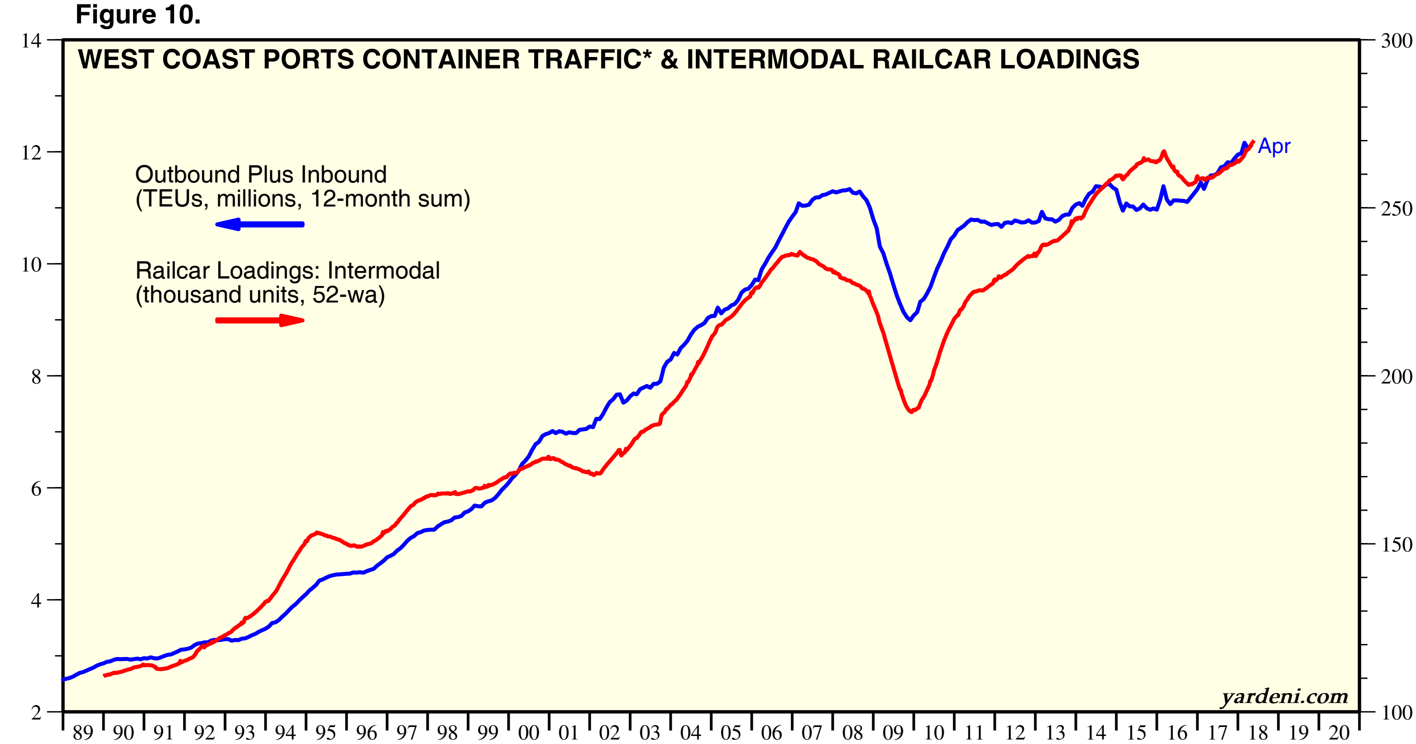
Source: Census Bureau.

Figure 9.



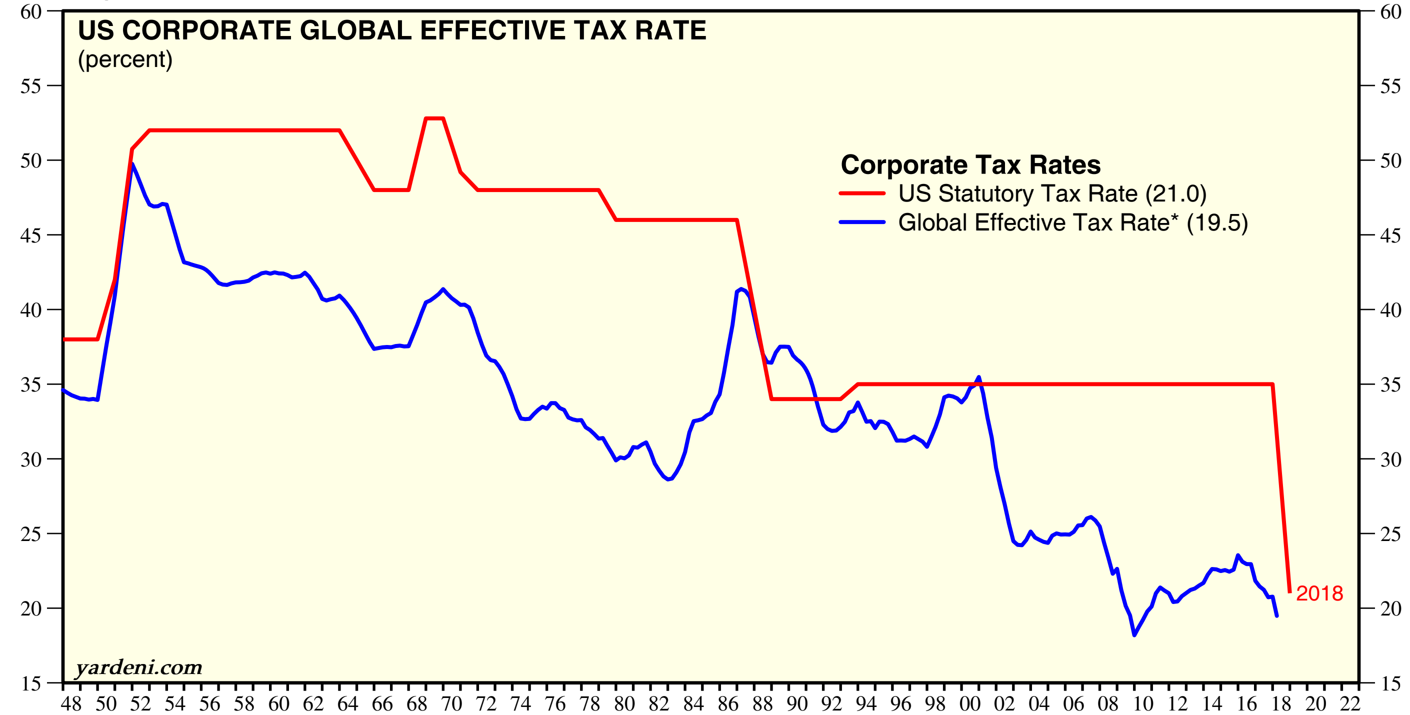
Source: American Trucking Association.

Figure 10.



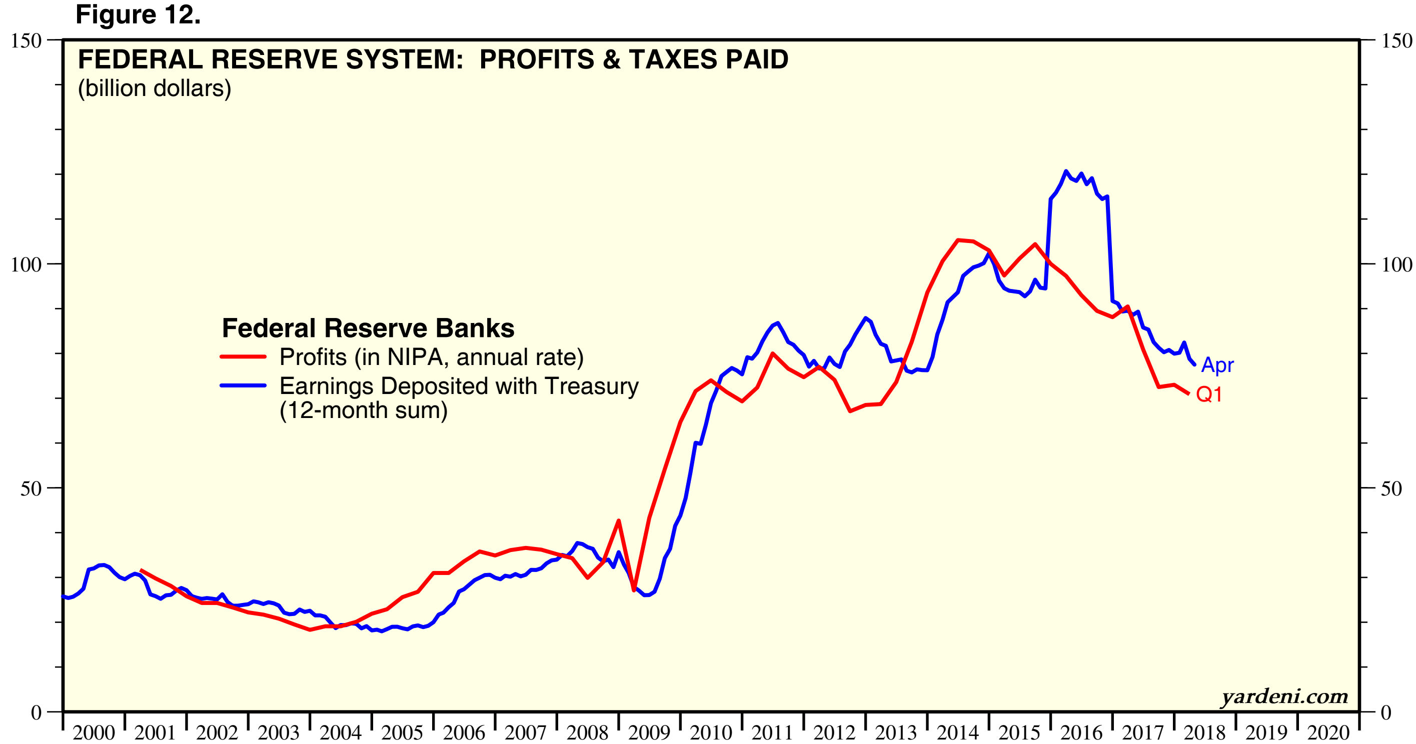
* Sum of Port of Los Angeles and Port of Long Beach Loaded Containers. TEUs=20-foot equivalent units.
Source: Ports of Los Angeles and Long Beach and Atlantic Systems.

Figure 11.



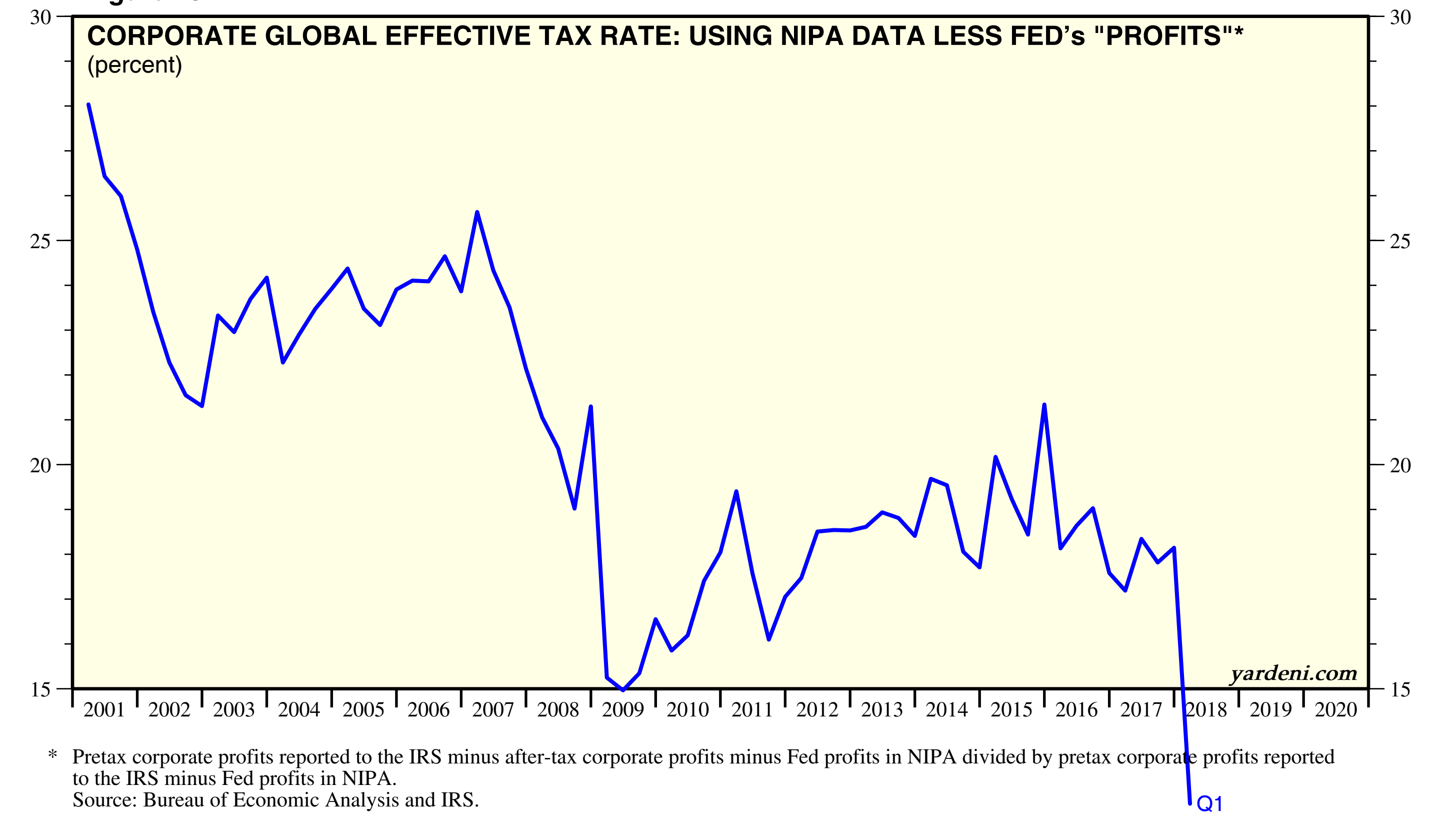
* Pretax corporate profits reported to the IRS minus after-tax corporate profits divided by pretax profits. Using four-quarter averages.
Source: Bureau of Economic Analysis and US Treasury.

Figure 12.



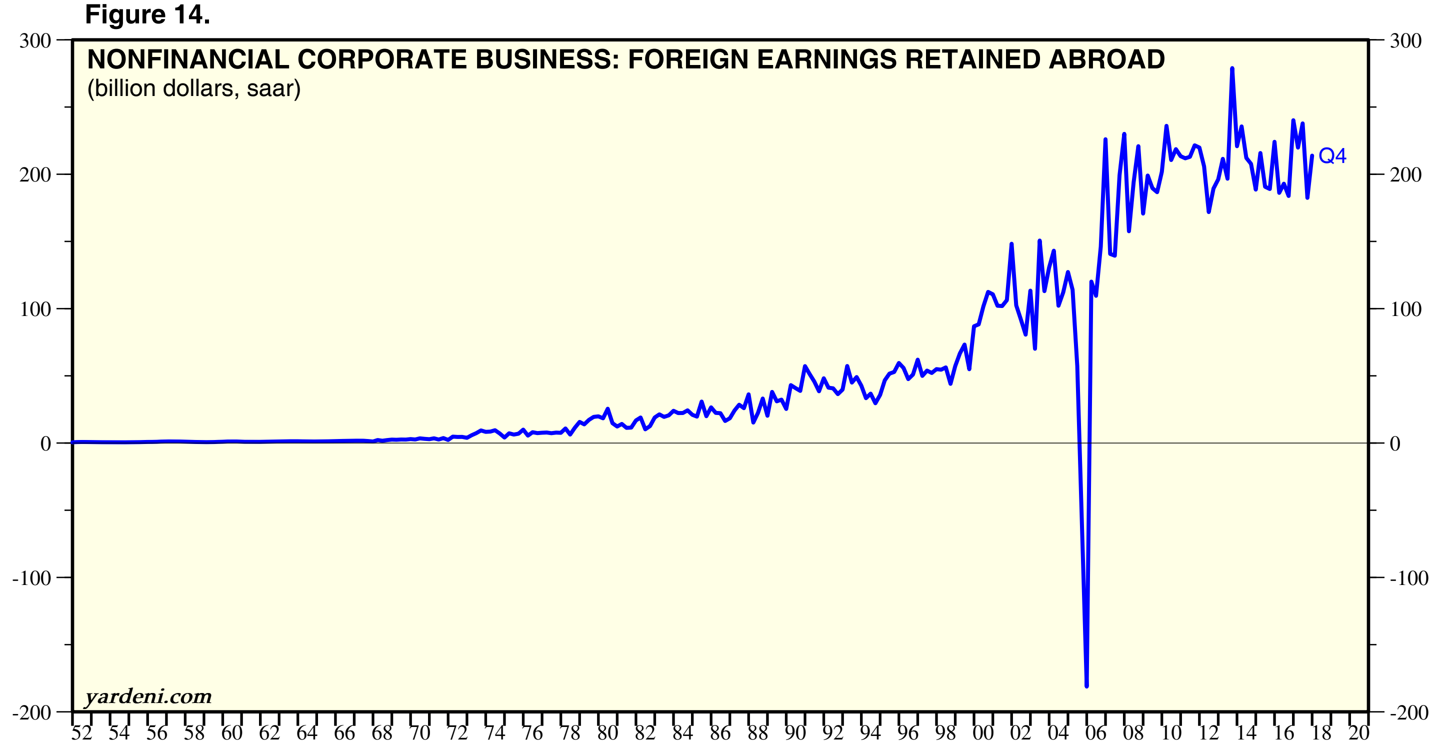
Source: US Treasury and Bureau of Economic Analysis.

Figure 13.



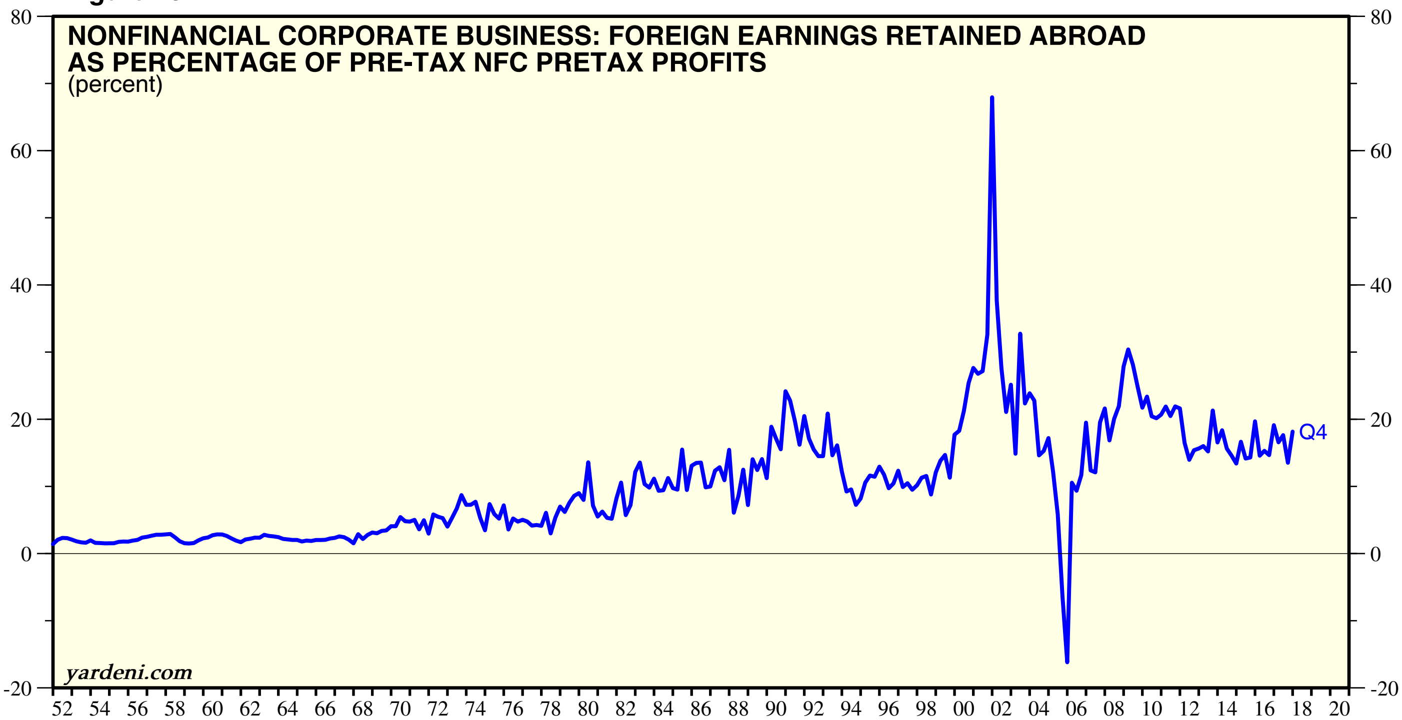
* Pretax corporate profits reported to the IRS minus after-tax corporate profits minus Fed profits in NIPA divided by pretax corporate profits reported to the IRS minus Fed profits in NIPA.
Source: Bureau of Economic Analysis and IRS.

Figure 14.



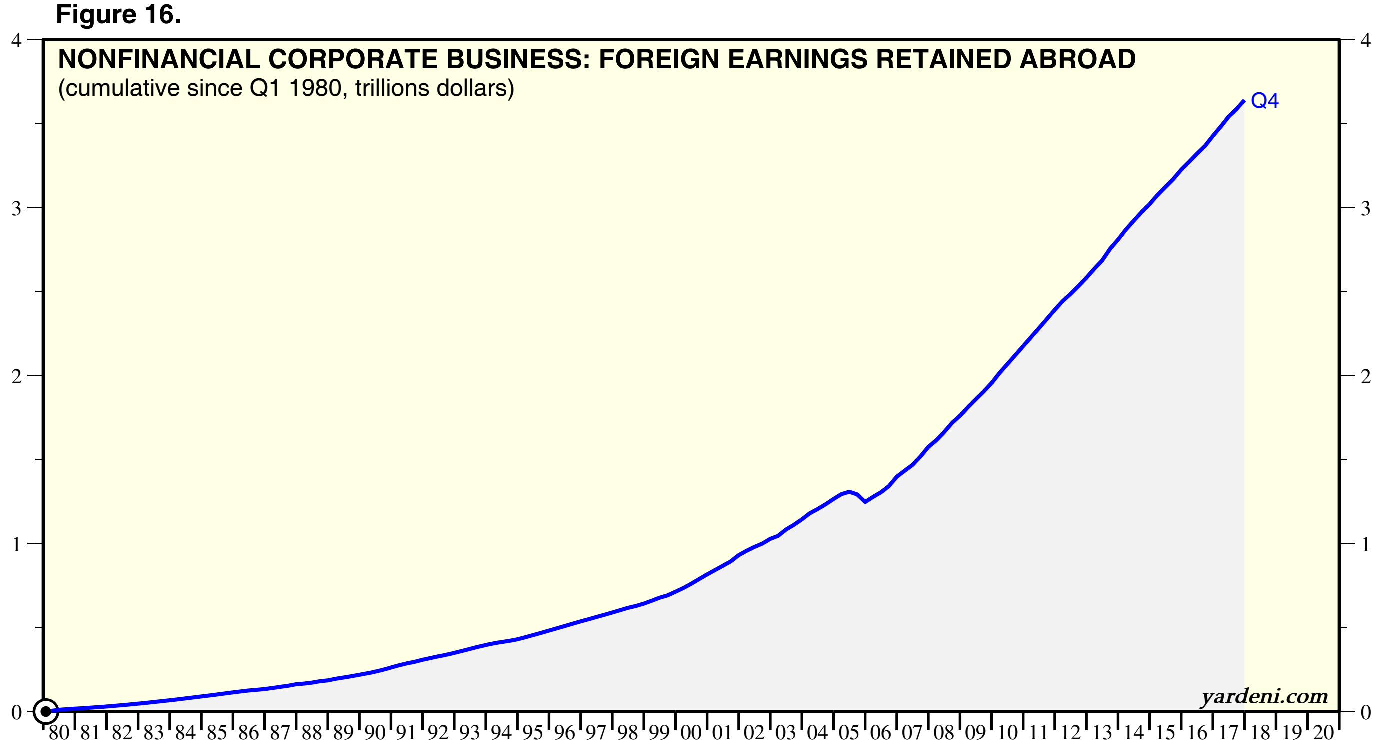
Source: Federal Reserve Board, Financial Accounts of the United States.

Figure 15.



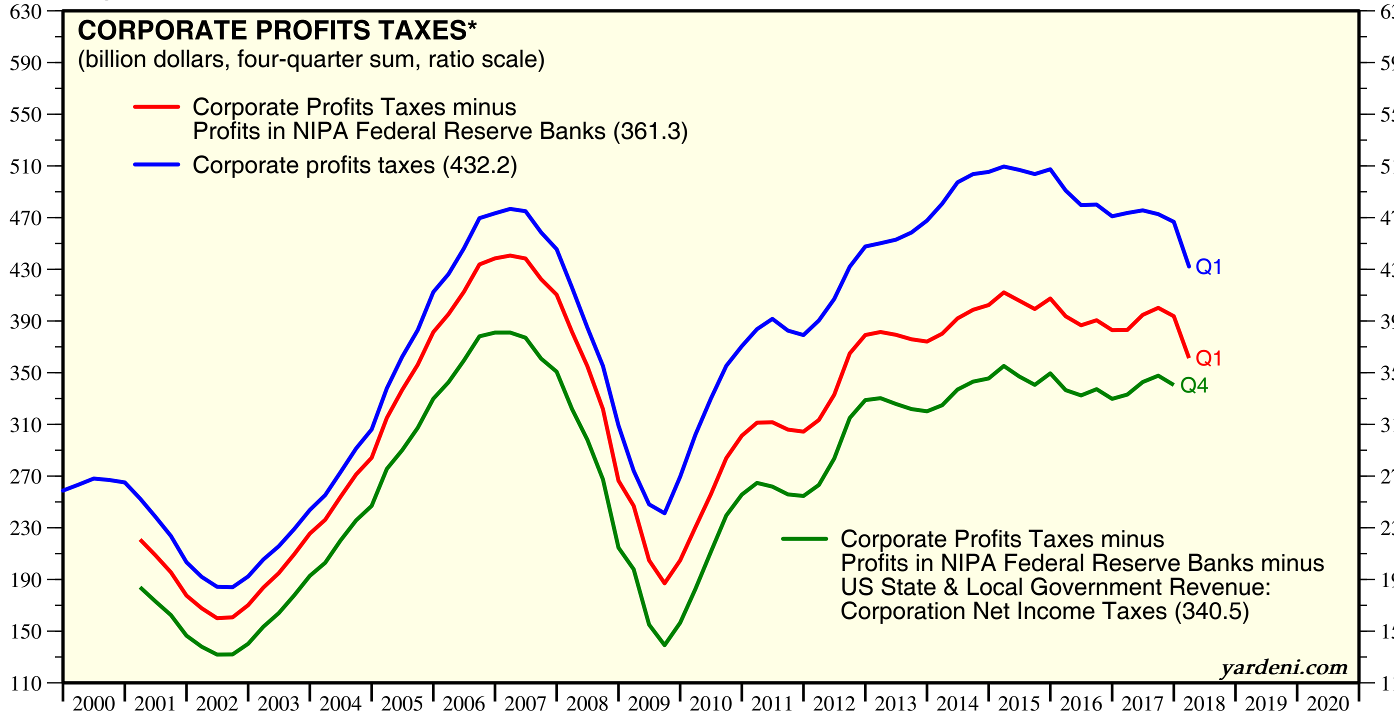
Source: Federal Reserve Board, Financial Accounts of the United States.

Figure 16.



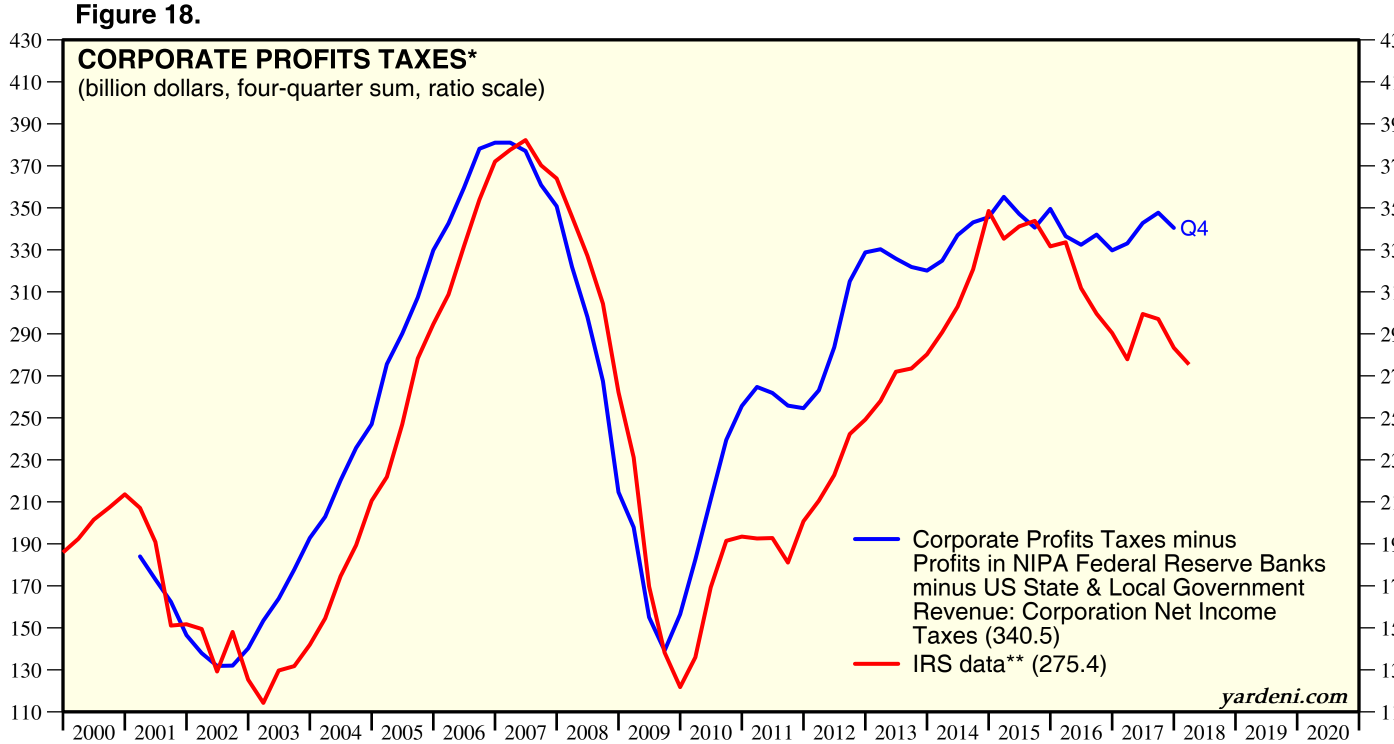
Source: Federal Reserve Board, Financial Accounts of the United States, Table F.103.

Figure 17.



* Pretax corporate profits reported to the IRS minus after-tax corporate profits (excluding IVA and CCAdj).
Source: US Treasury, Census Bureau, and Bureau of Economic Analysis.

Figure 18.



* Pretax corporate profits reported to the IRS minus after-tax corporate profits (excluding IVA and CCAdj).
** Based on 12-month sum of monthly data converted to end of quarter.
Source: US Treasury, Census Bureau, and Bureau of Economic Analysis.