

Chart Collection for Morning Briefing

Yardeni Research, Inc.

February 6, 2018

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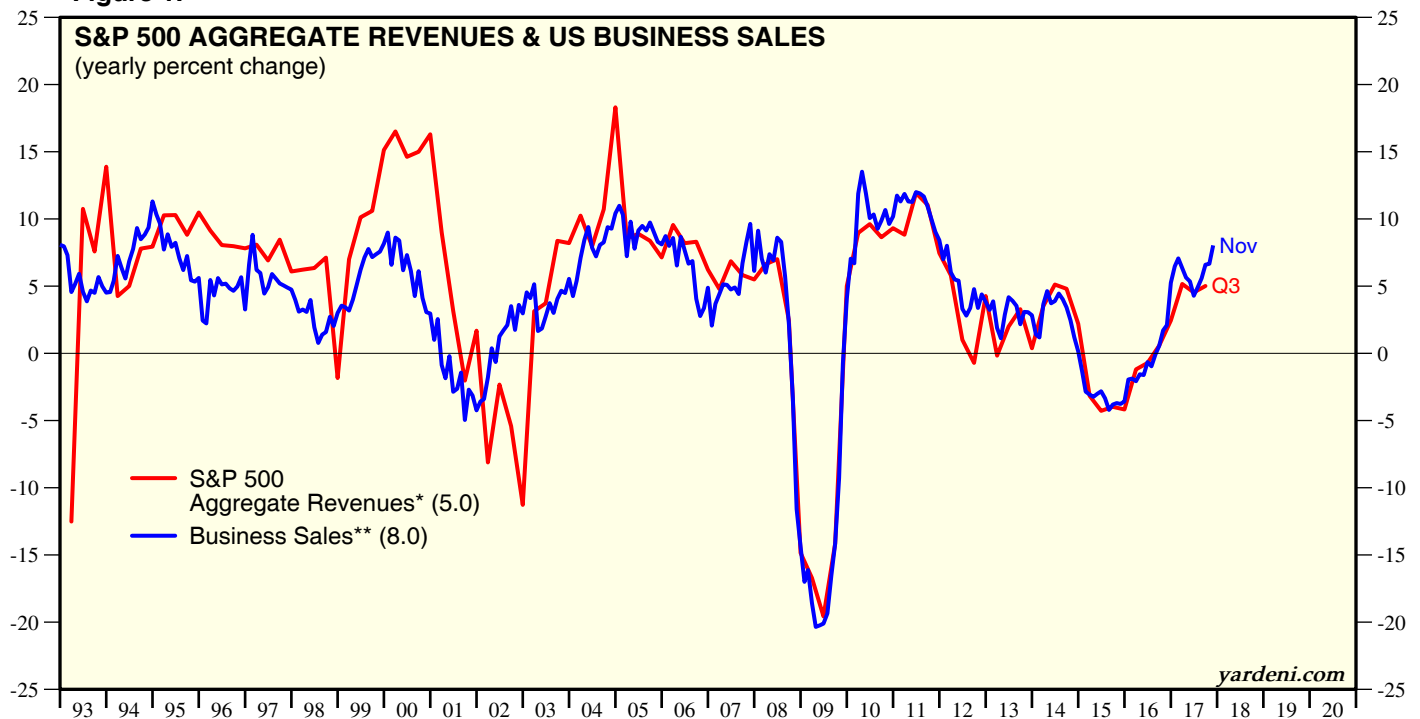
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thinking outside the box

Figure 1.

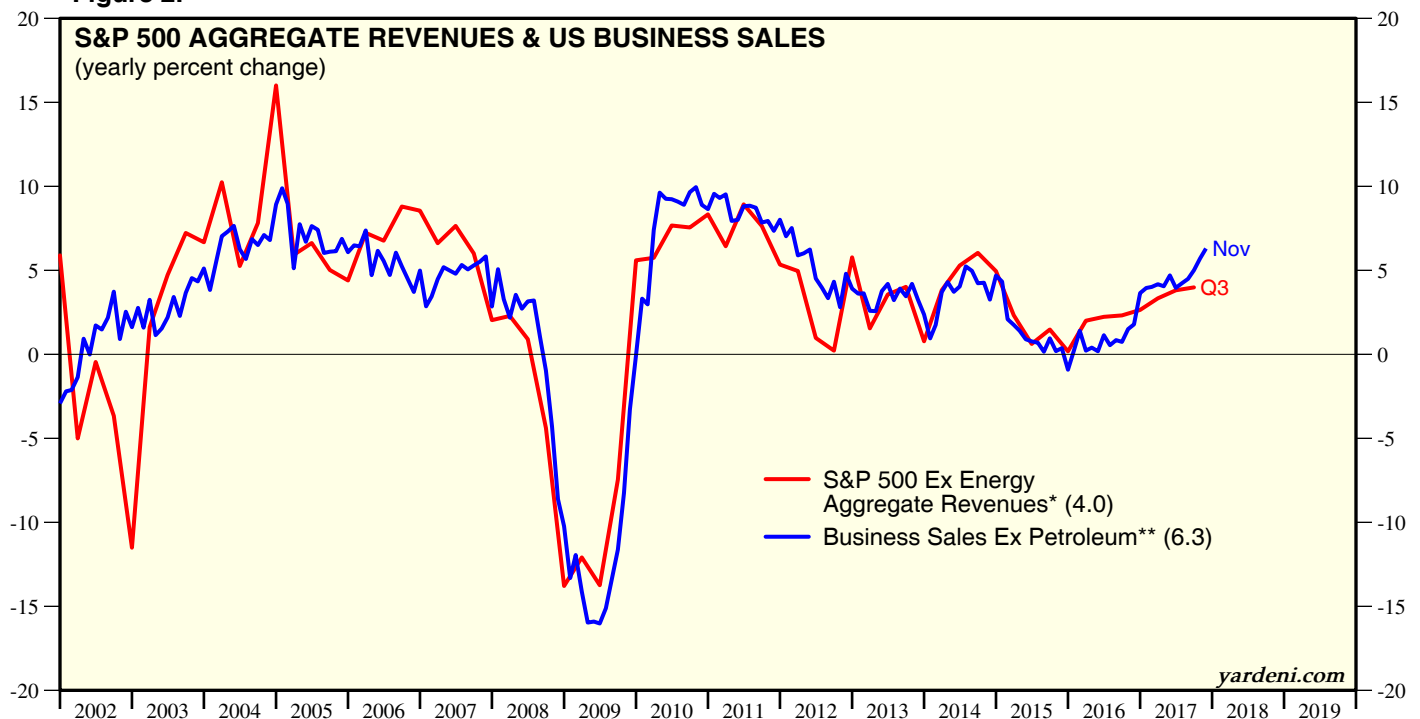


* Revenues are derived by multiplying S&P 500 revenues per share by the S&P 500 divisor for each quarter.

** Manufacturing and trade sales.

Source: Census Bureau and Standard & Poor's.

Figure 2.

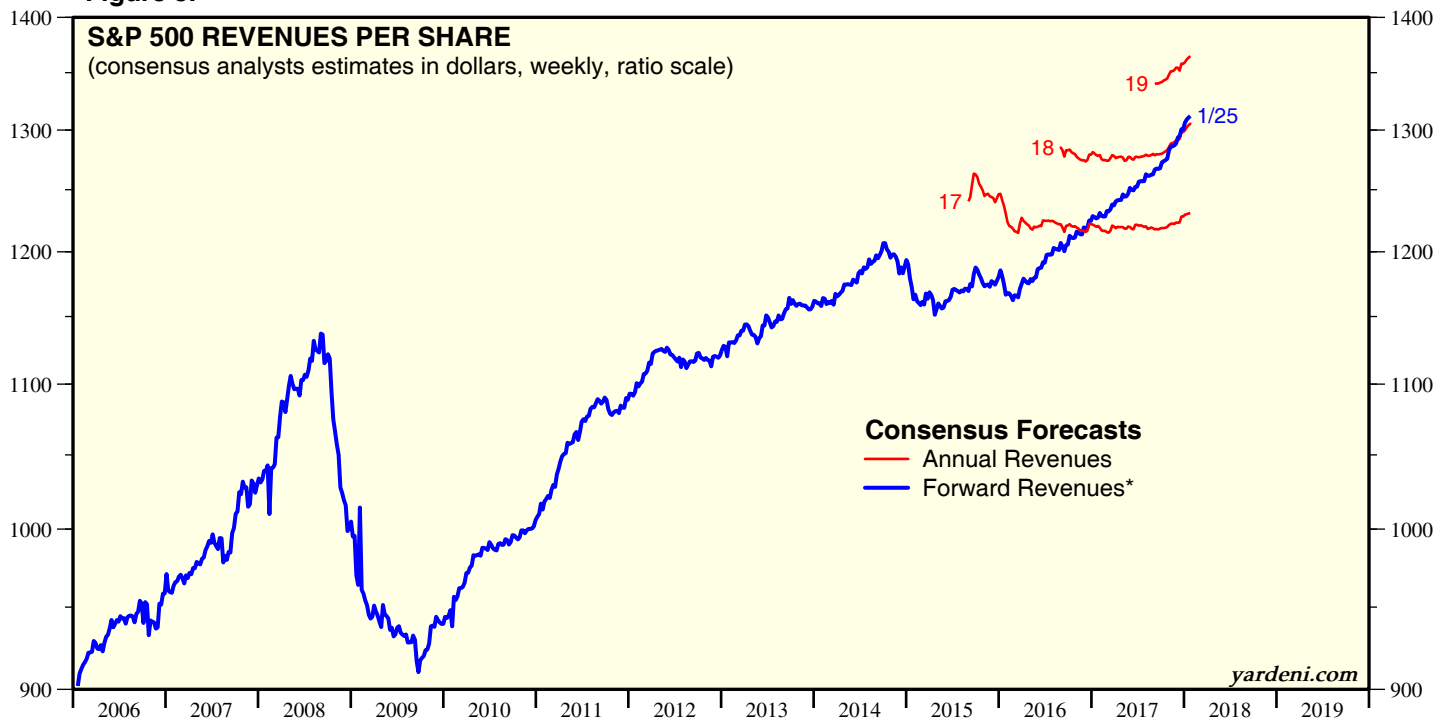


* S&P quarterly data, not per share.

** Manufacturing and trade sales.

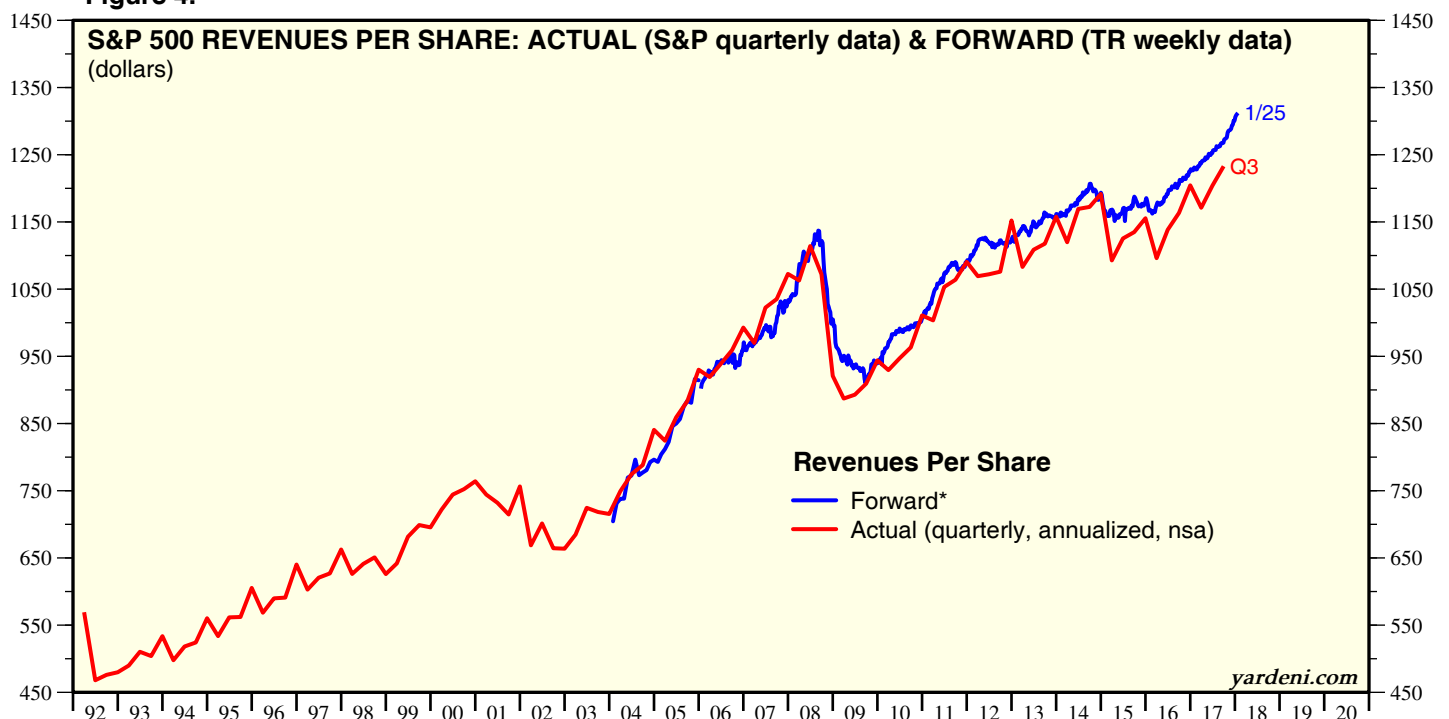
Source: Census Bureau and Standard & Poor's.

Figure 3.



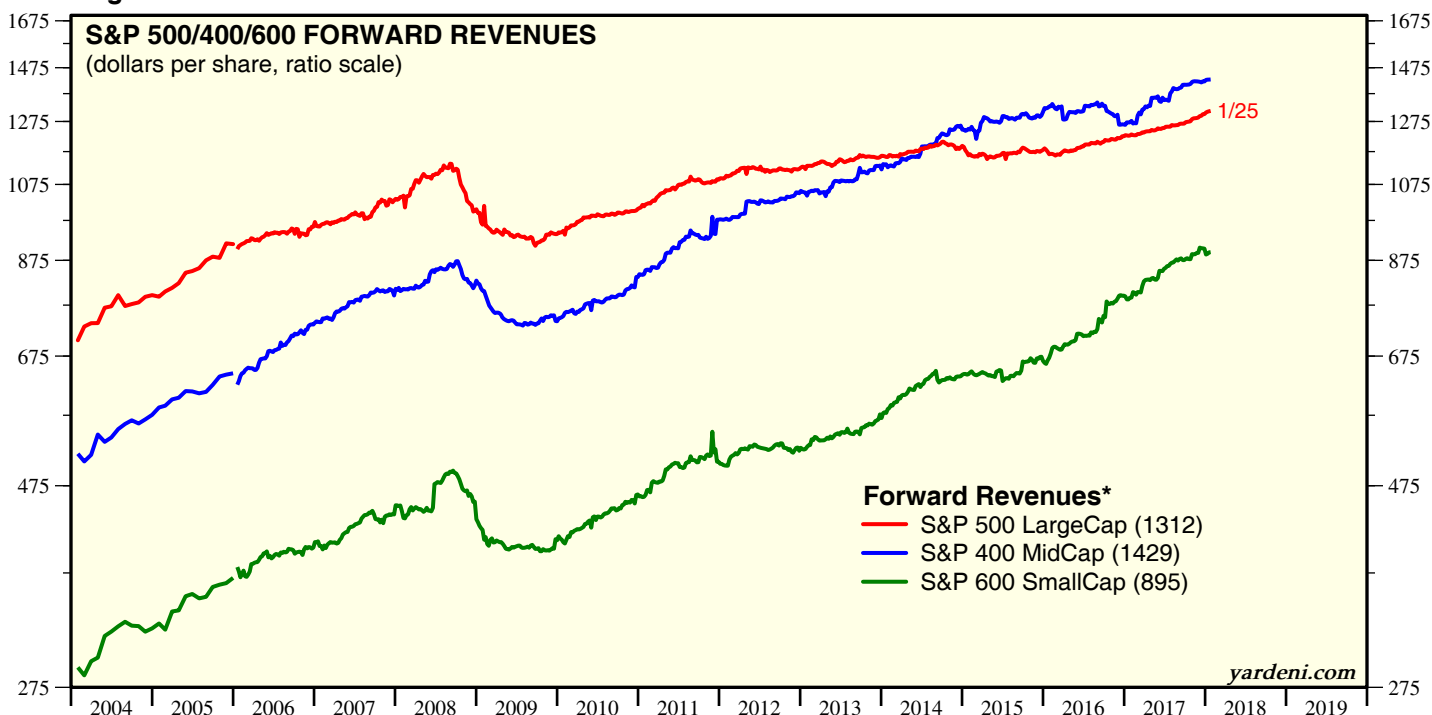
* Time-weighted average of consensus revenue estimates for current and next year.
Source: Thomson Reuters I/B/E/S.

Figure 4.



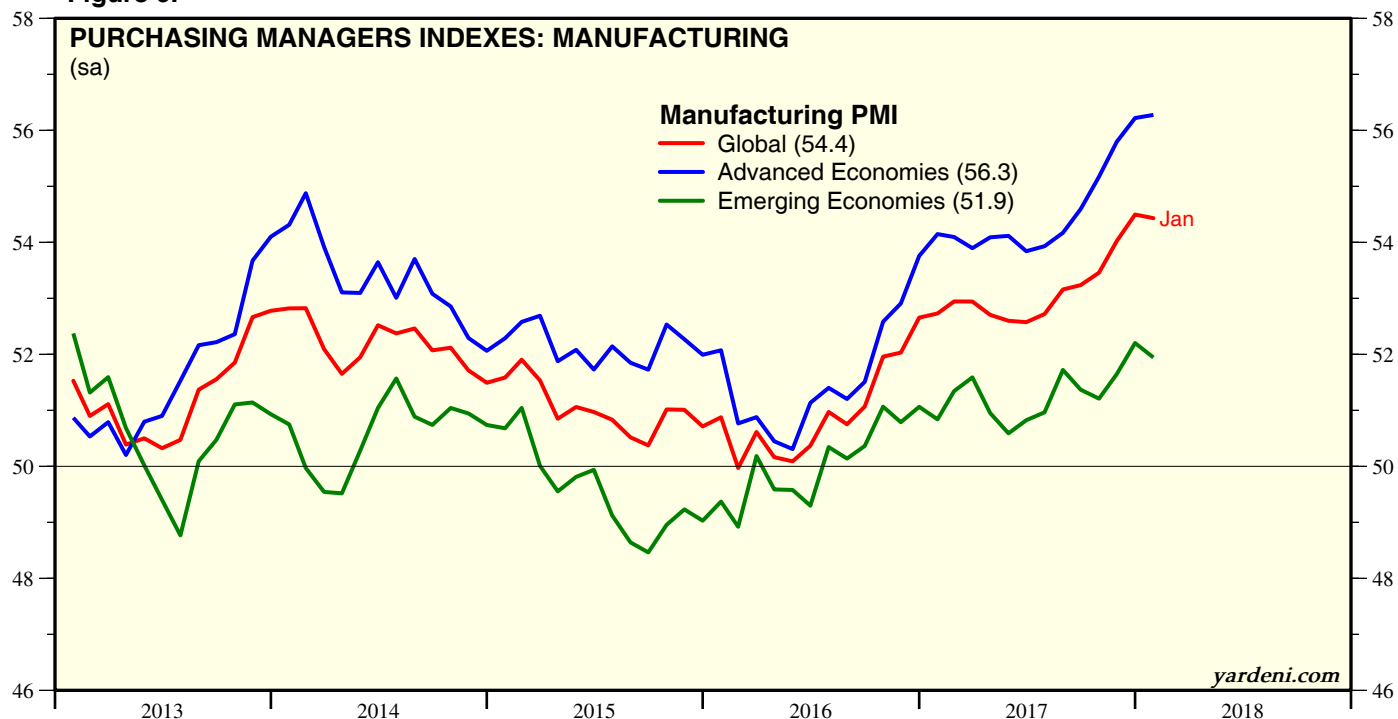
* Time-weighted average of consensus estimates for current year and next year. Monthly through December 2005, then weekly.
Source: Standard & Poor's (for actual revenues) and Thomson Reuters I/B/E/S (for forward revenues).

Figure 5.



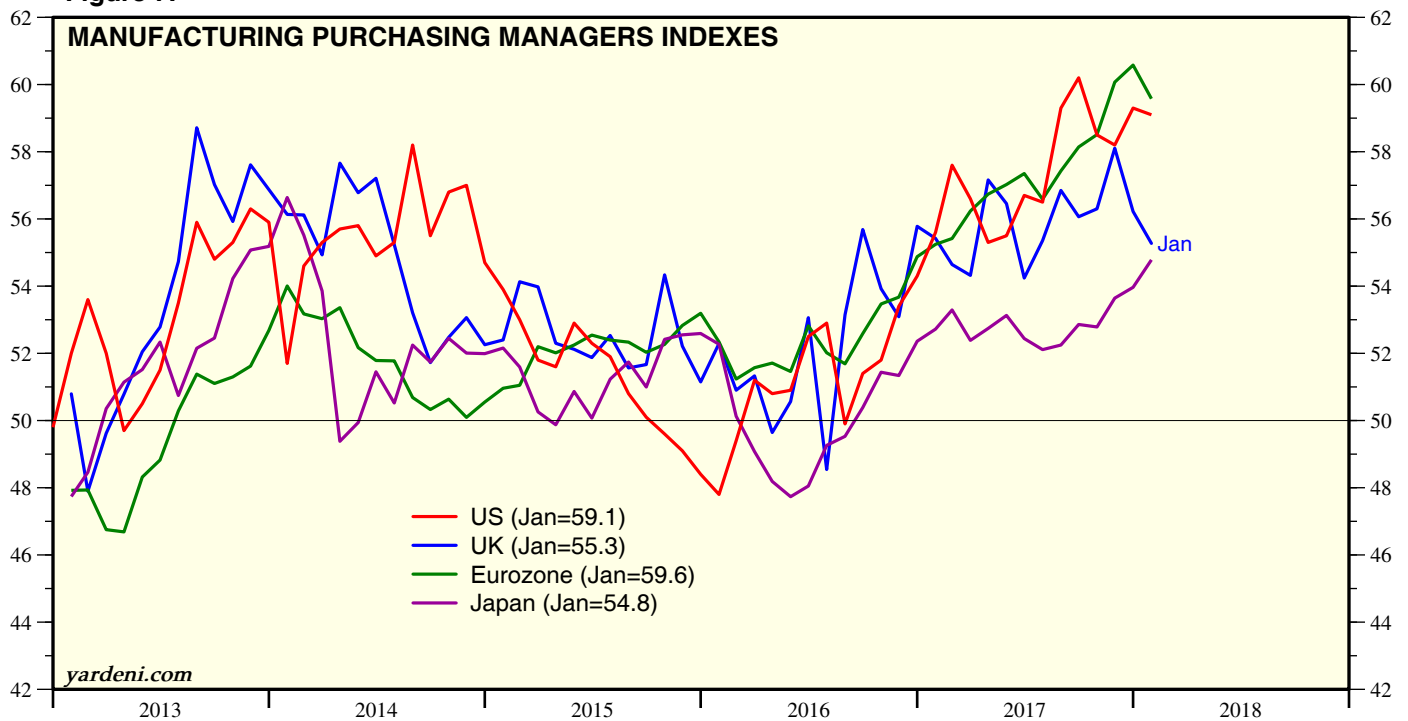
* Time-weighted average of consensus estimates for current year and next year.
Source: Thomson Reuters I/B/E/S.

Figure 6.



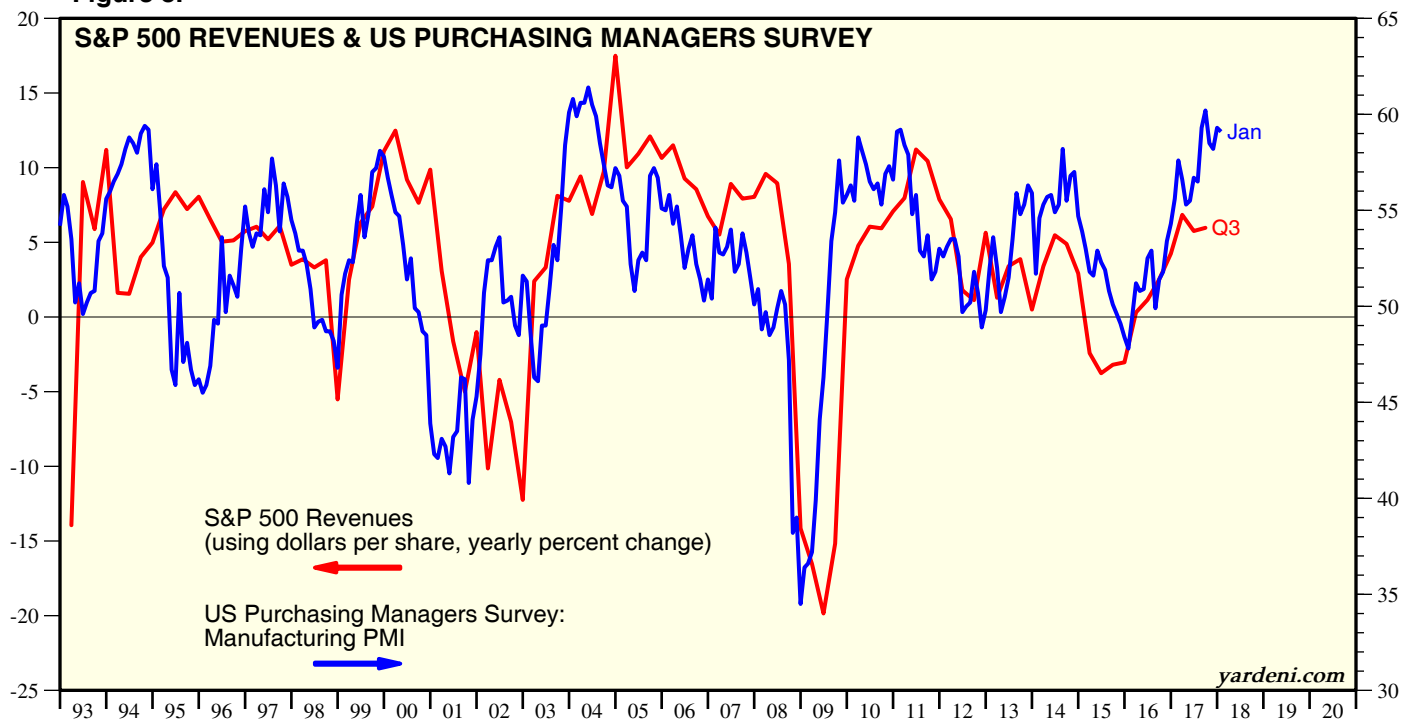
Source: Markit and Haver Analytics.

Figure 7.



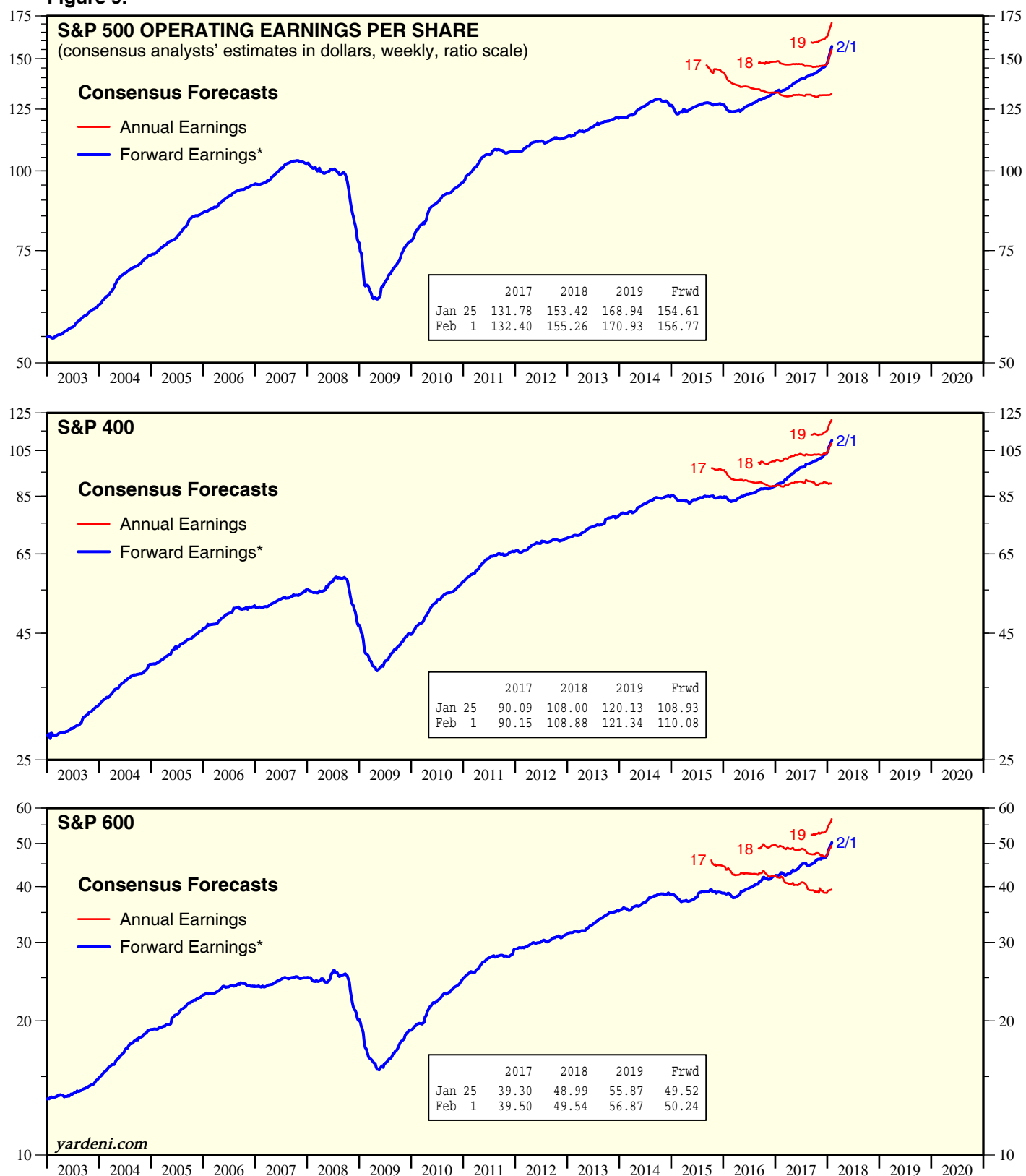
* An index above 50 indicates an increase in manufacturing activity. An index below 50 indicates a decrease in manufacturing activity.
Source: Institute for Supply Management, CIPS, Markit, and Haver Analytics.

Figure 8.



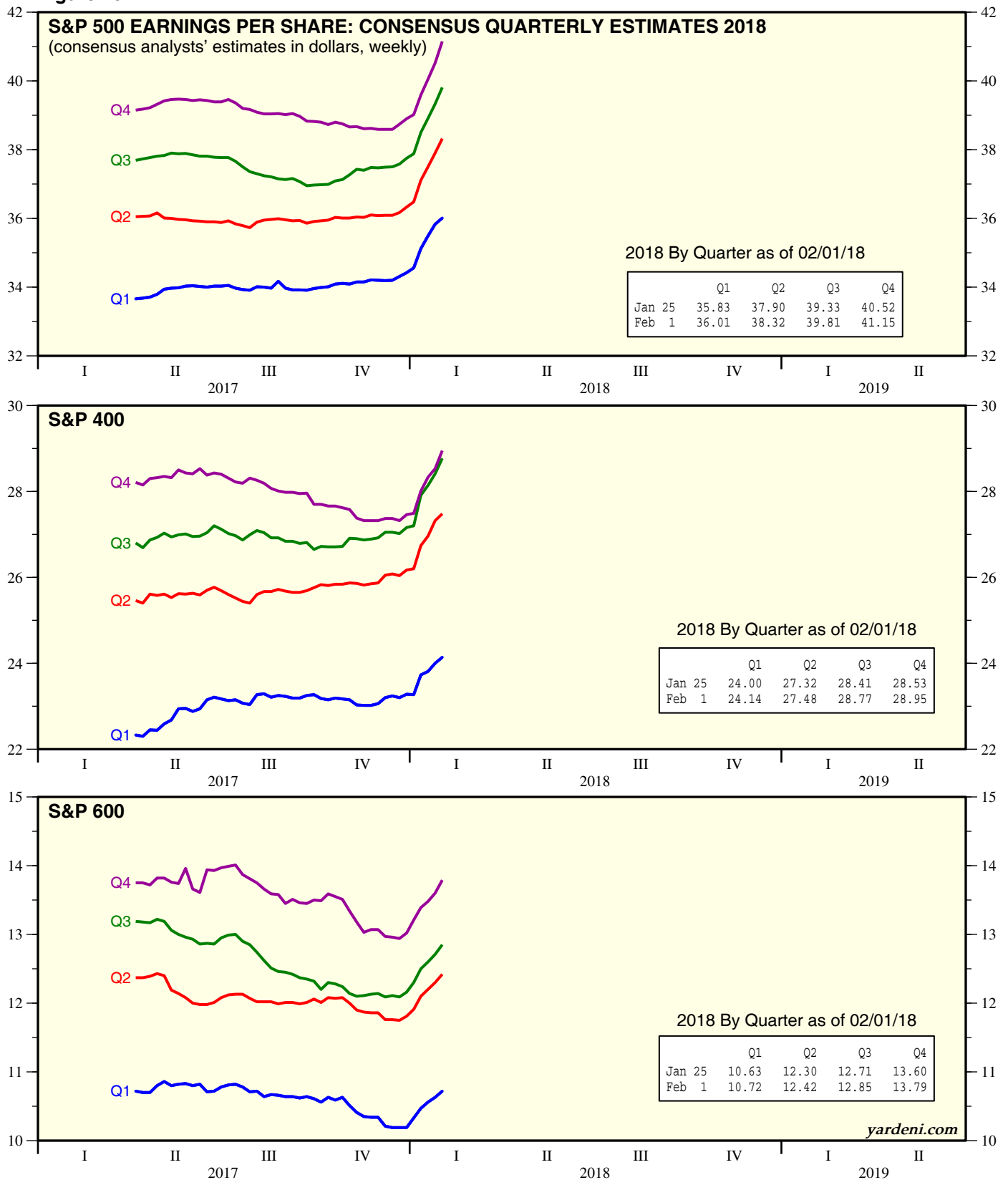
Source: Standard & Poor's and Institute for Supply Management.

Figure 9.



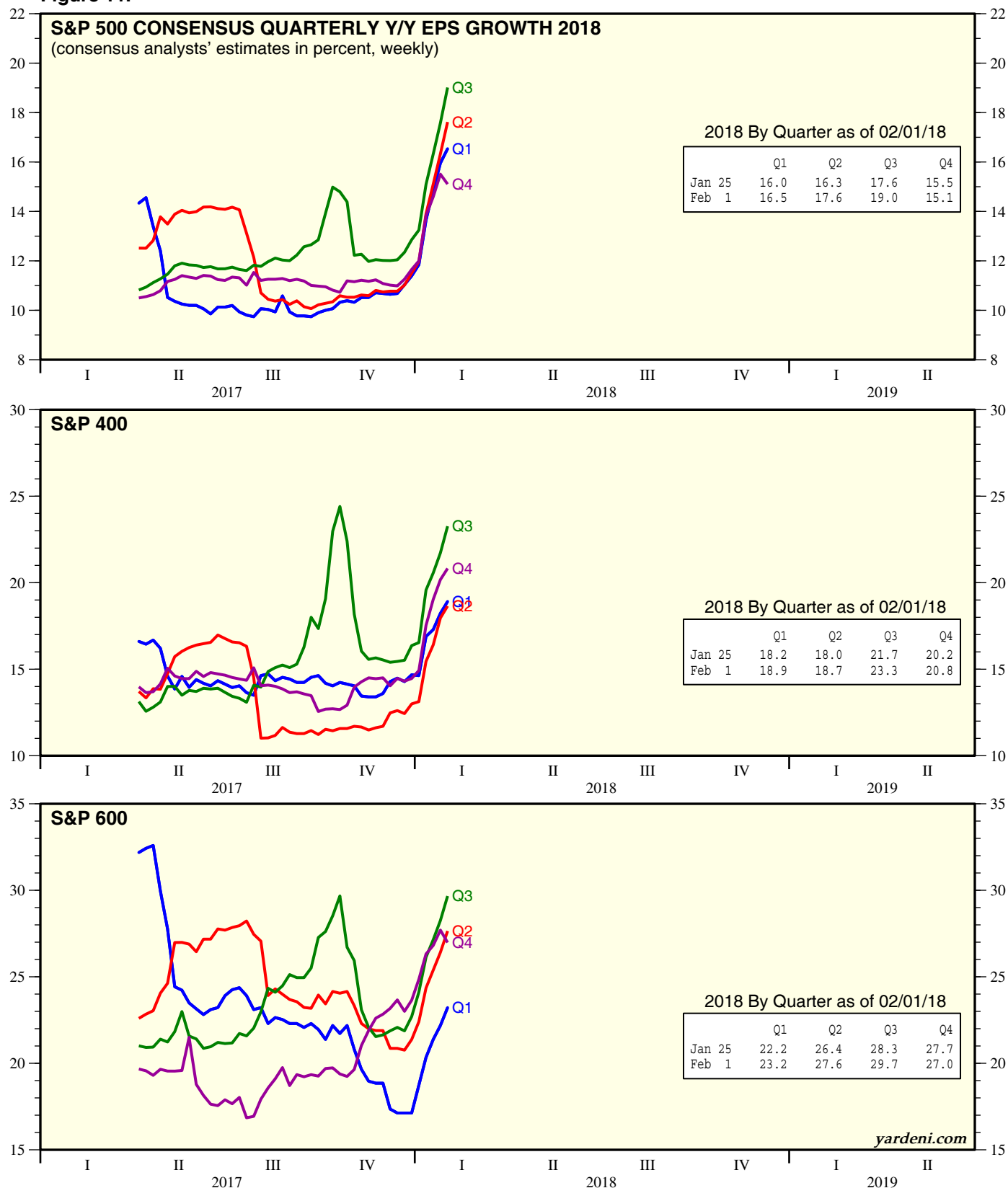
* Time-weighted average of consensus estimates for current and next year.
Source: Thomson Reuters I/B/E/S.

Figure 10.



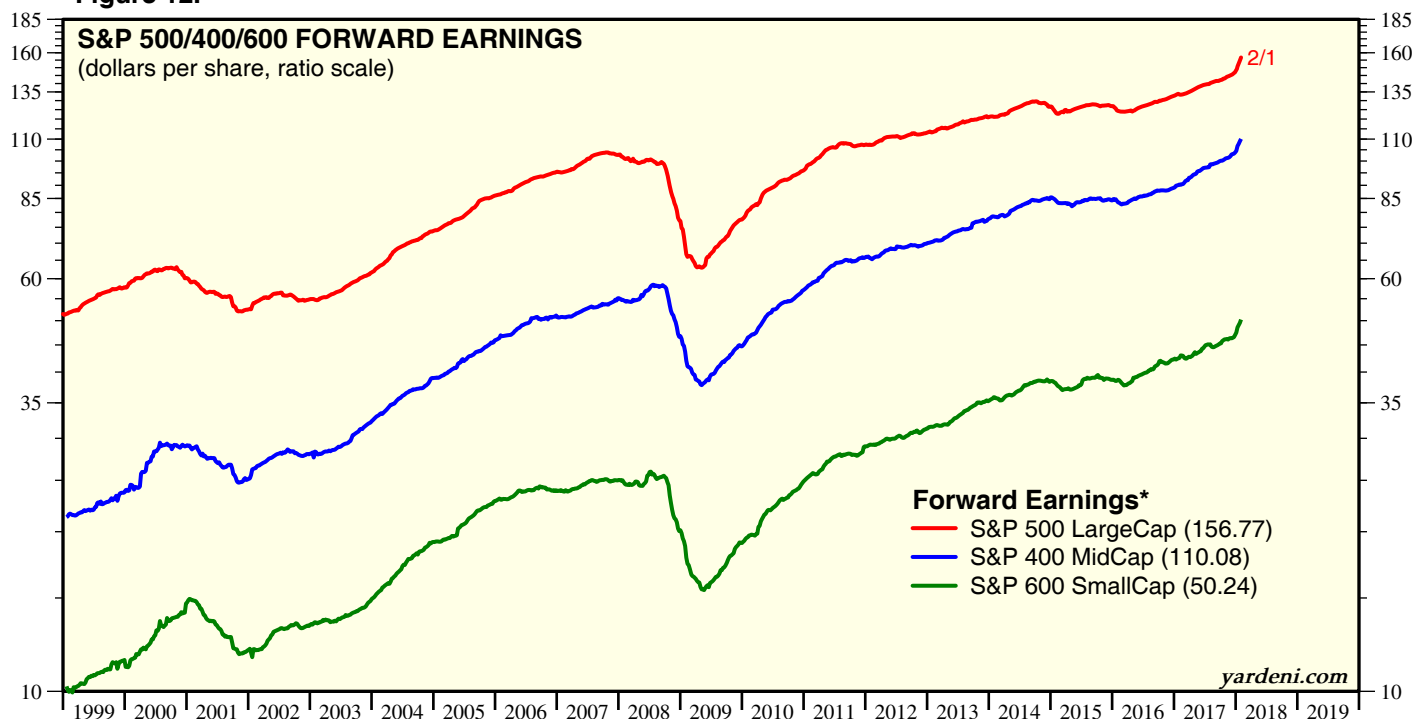
Source: Thomson Reuters I/B/E/S.

Figure 11.



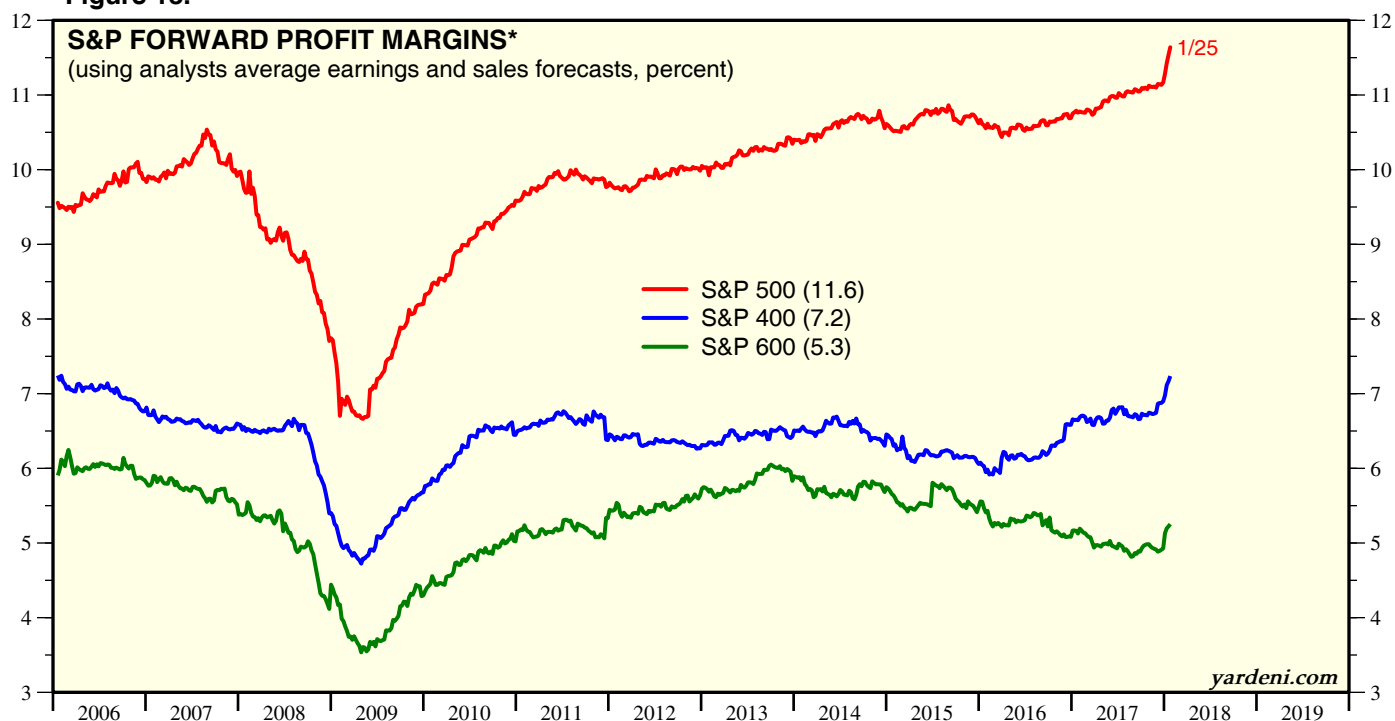
Source: Thomson Reuters I/B/E/S.

Figure 12.



* Time-weighted average of consensus estimates for current year and next year.
Source: Thomson Reuters I/B/E/S.

Figure 13.



* Time-weighted average of the consensus estimates for current and next year.
Source: Thomson Reuters I/B/E/S and Standard & Poor's.

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