Chart Collection for Morning Briefing

Yardeni Research, Inc.

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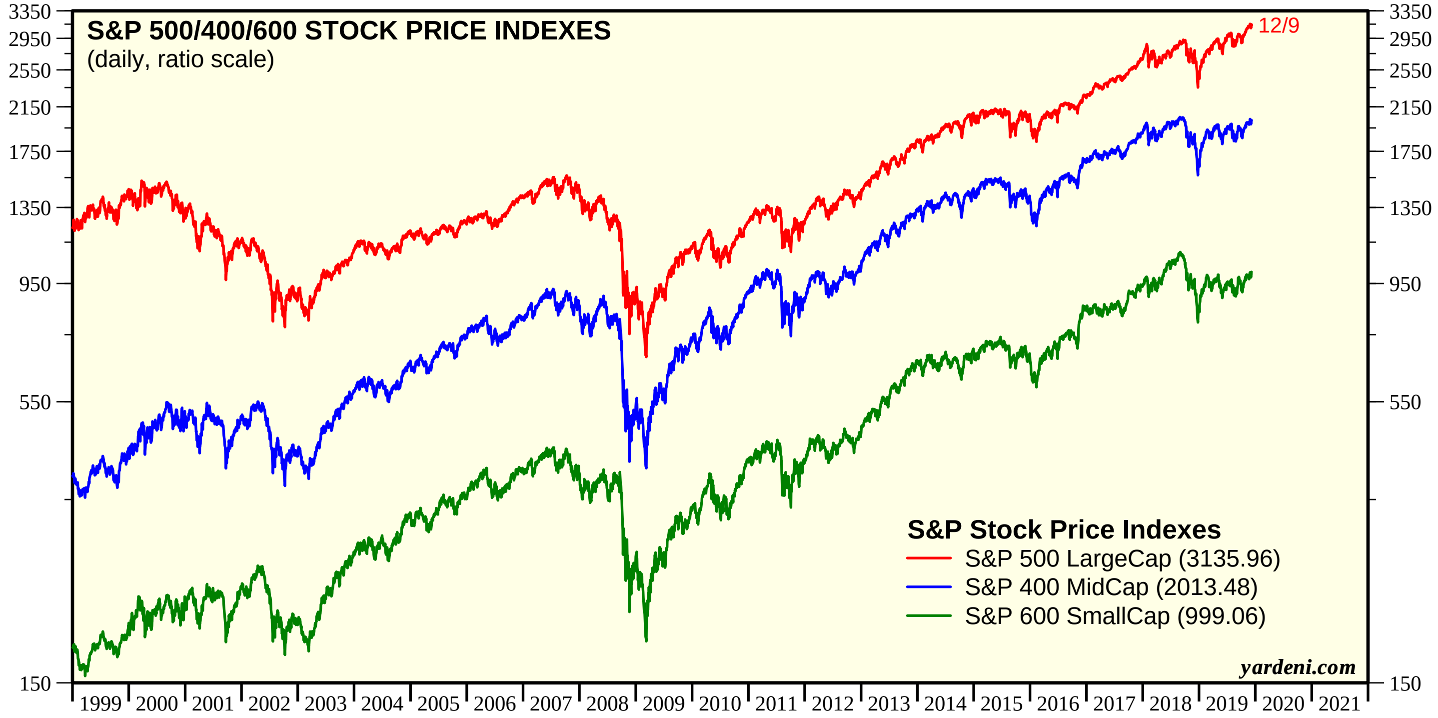
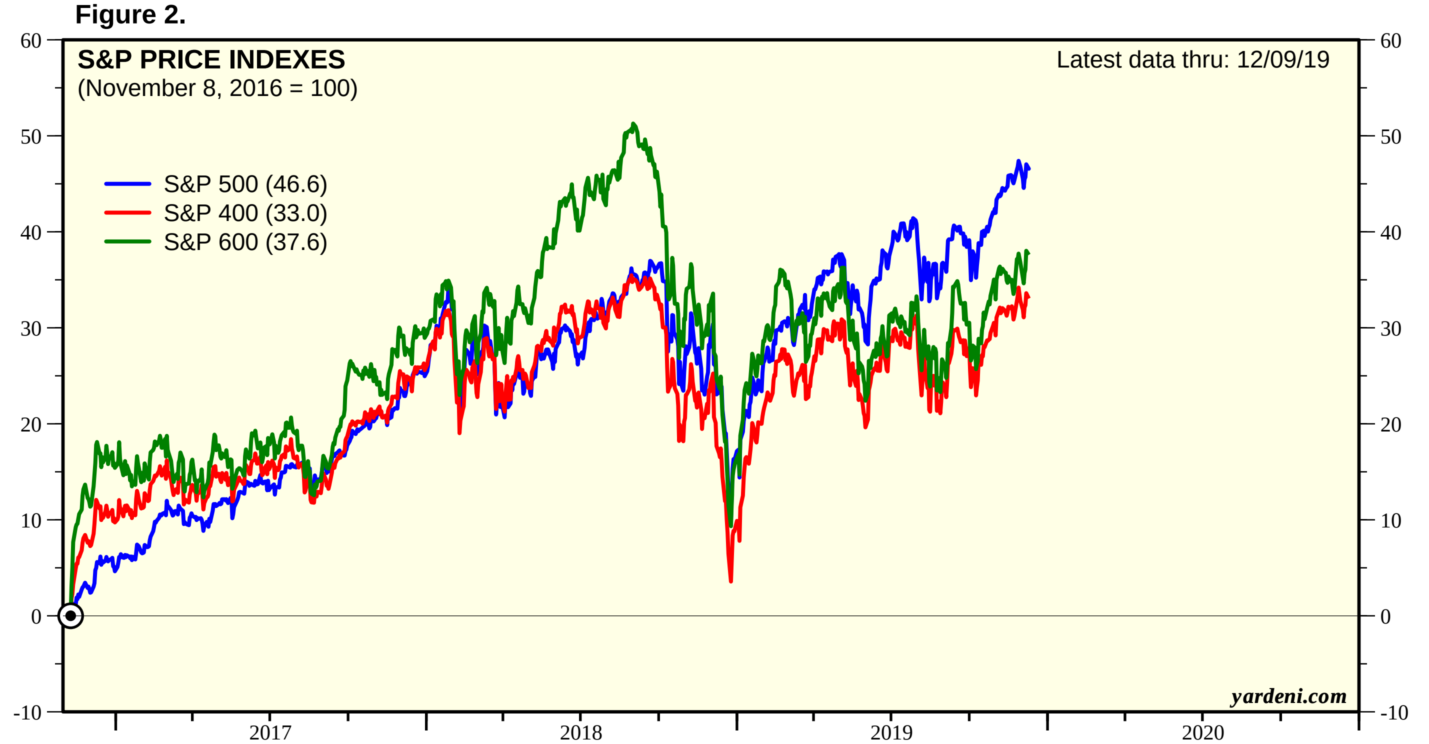
thinking outside the box

Figure 1.



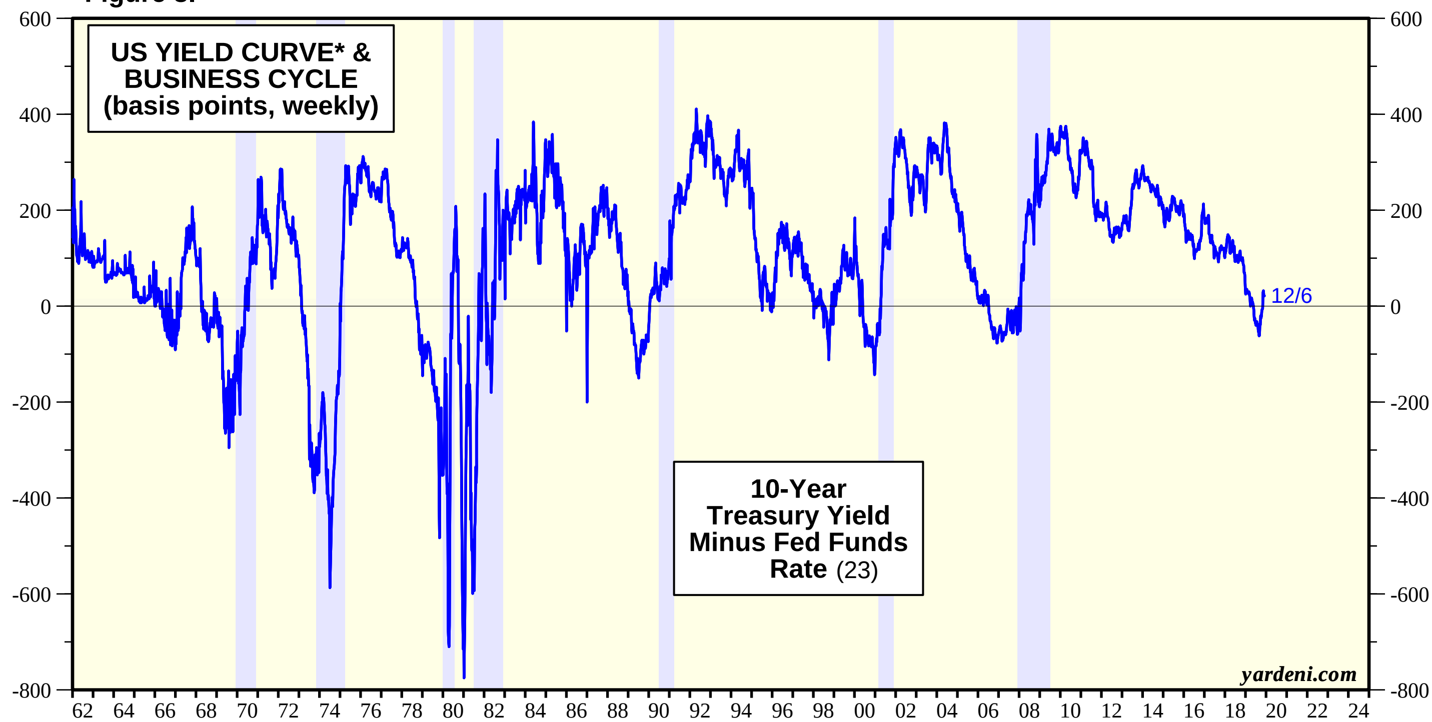
Source: Standard & Poor's.

Figure 2.



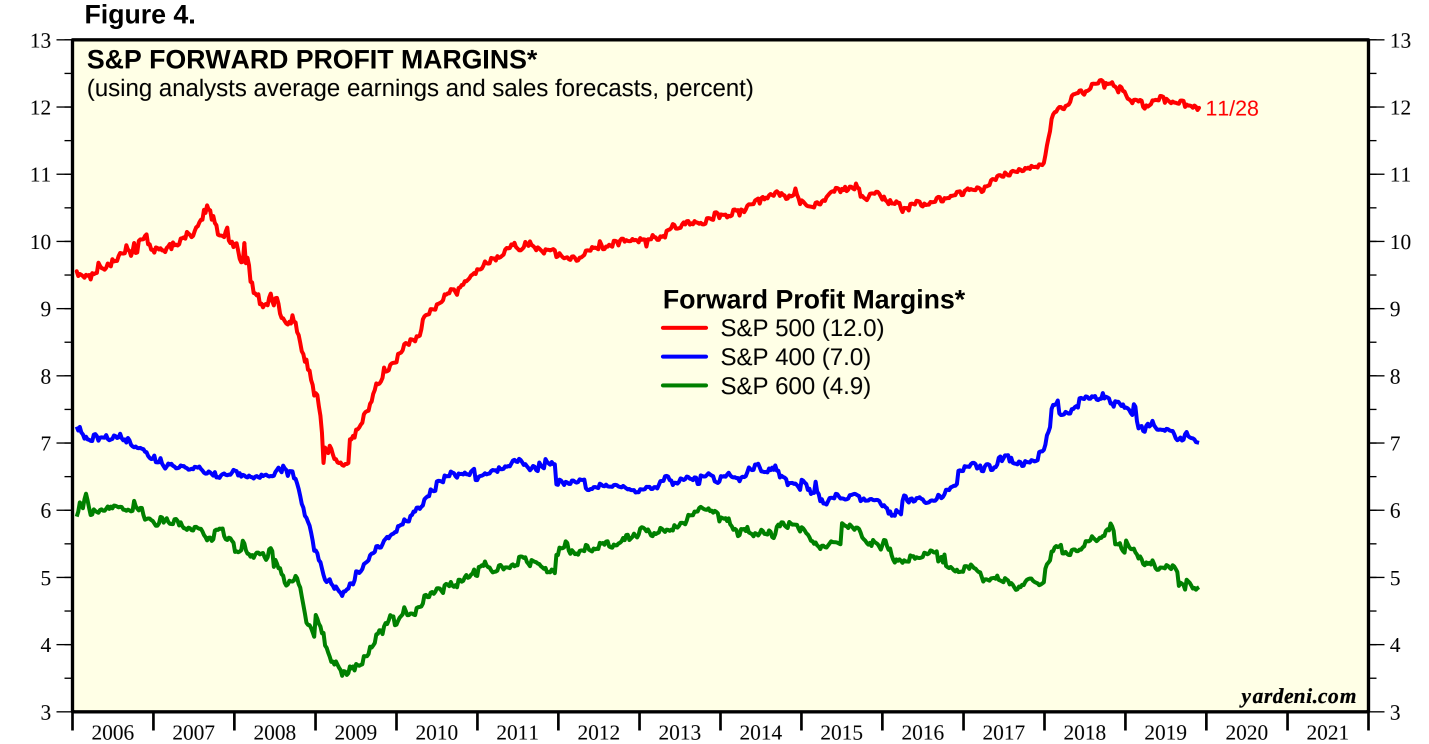
Source: Standard & Poor's.

Figure 3.



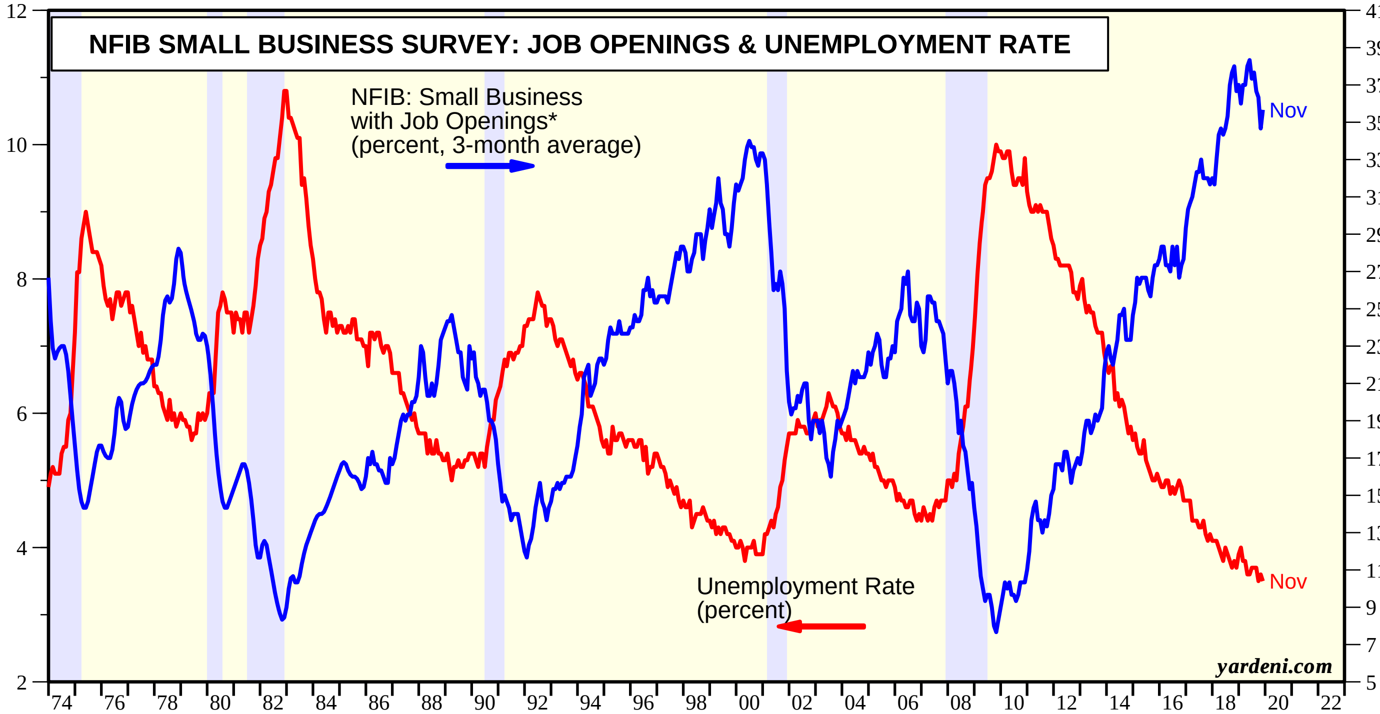
* 10-year US Treasury yield less federal funds rate.
Note: Shaded areas denote recessions according to the National Bureau of Economic Research.
Source: Federal Reserve Board.

Figure 4.



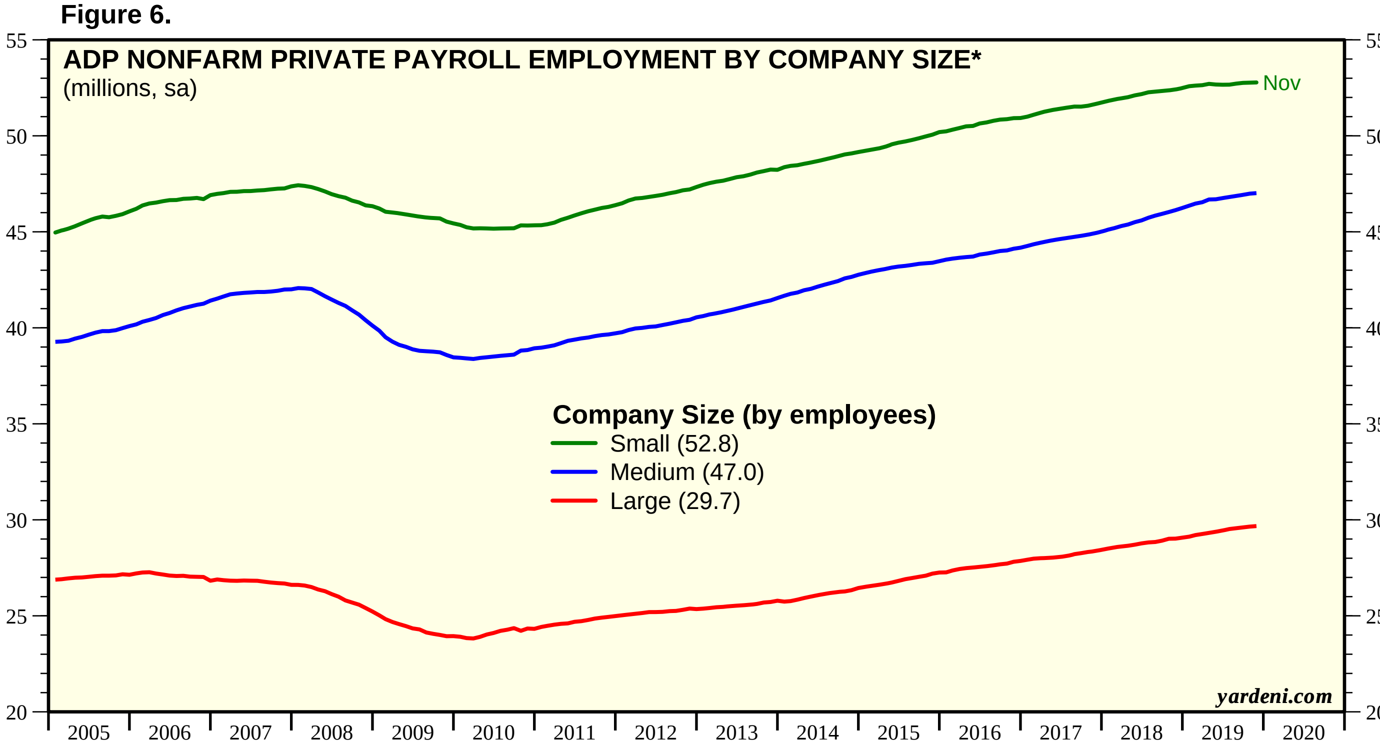
* Time-weighted average of the consensus estimates for current and next year using forward earnings divided by forward revenues.
Source: I/B/E/S data by Refinitiv and Standard & Poor's.

Figure 5.



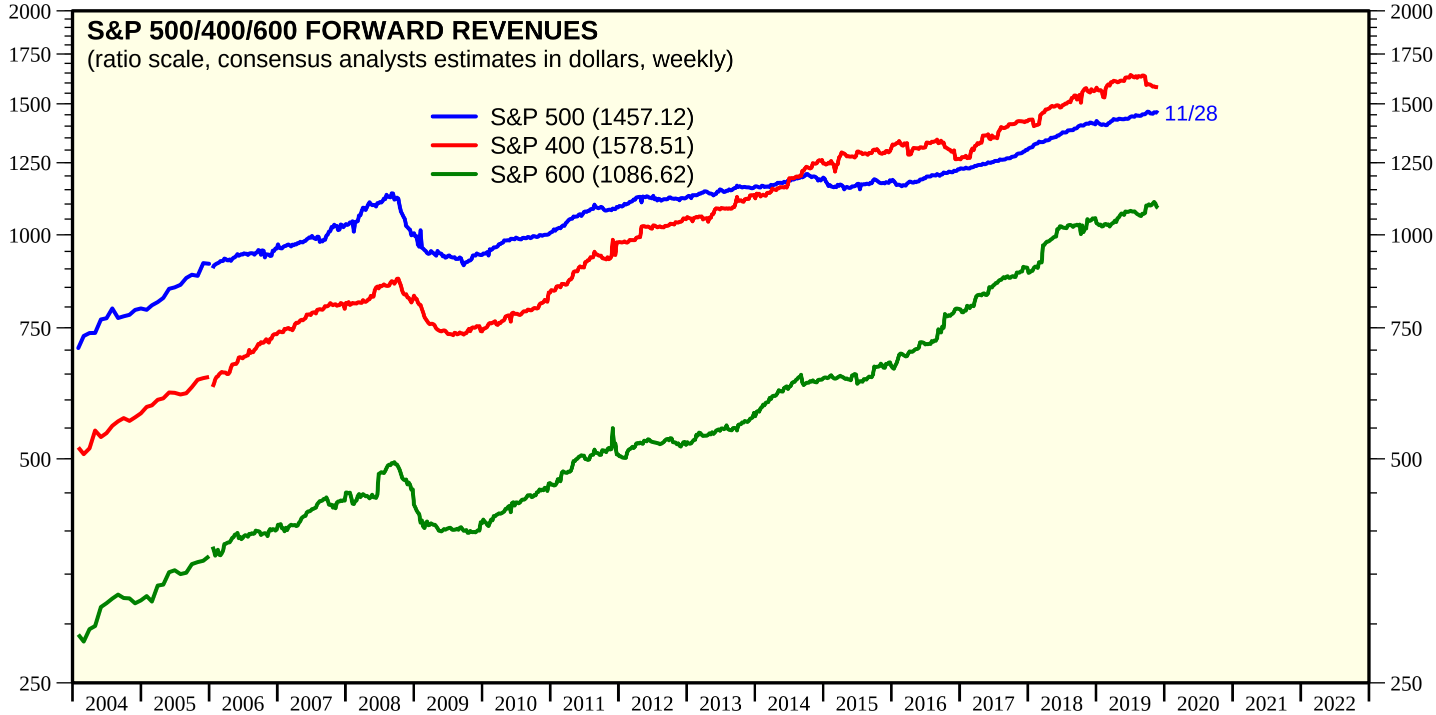
* First month of every quarter from 1974 to 1986, then monthly.
Note: Shaded areas denote recessions according to the National Bureau of Economic Research.
Source: National Federation of Independent Business and Bureau of Labor Statistics.

Figure 6.



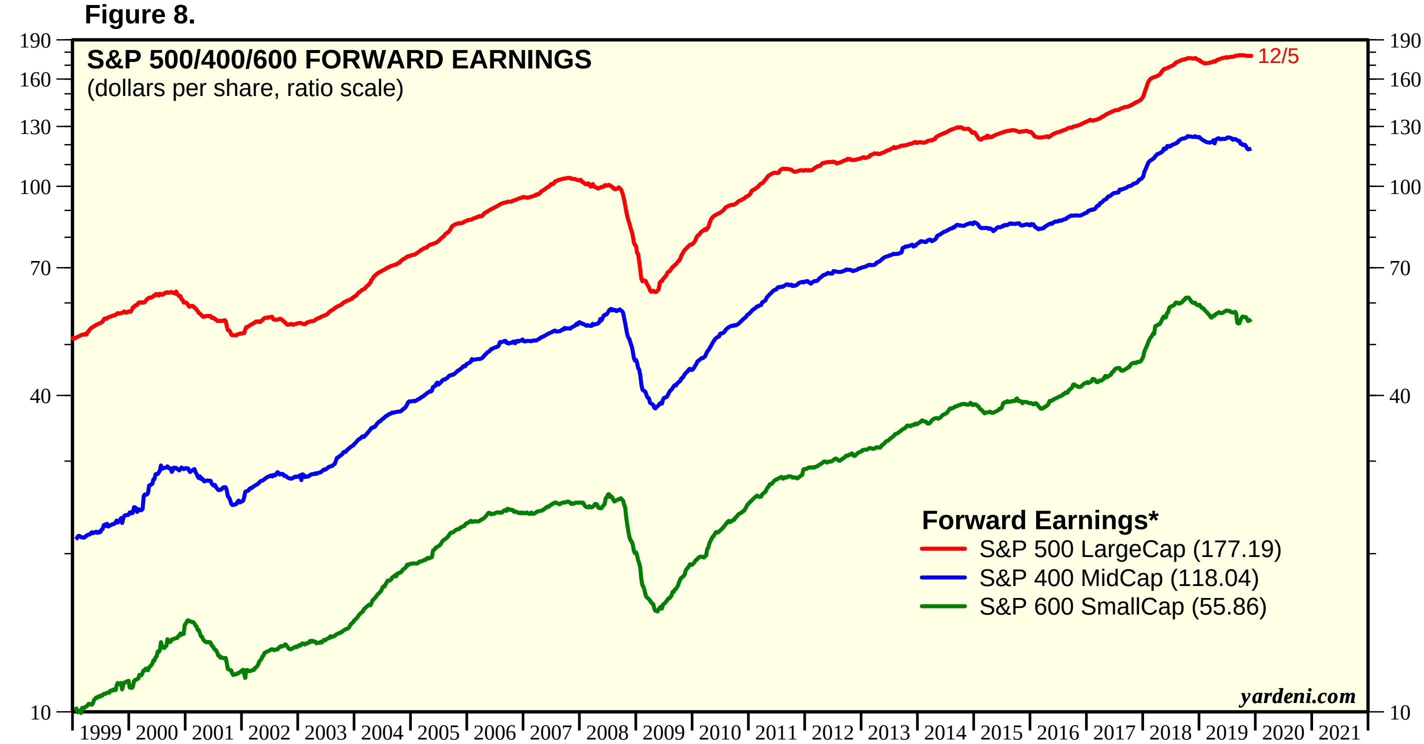
* Company size by employees: Small (1-49), Medium (50-499), and Large (over 500).
Source: ADP, Moody's Analytics, and Haver Analytics.

Figure 7.



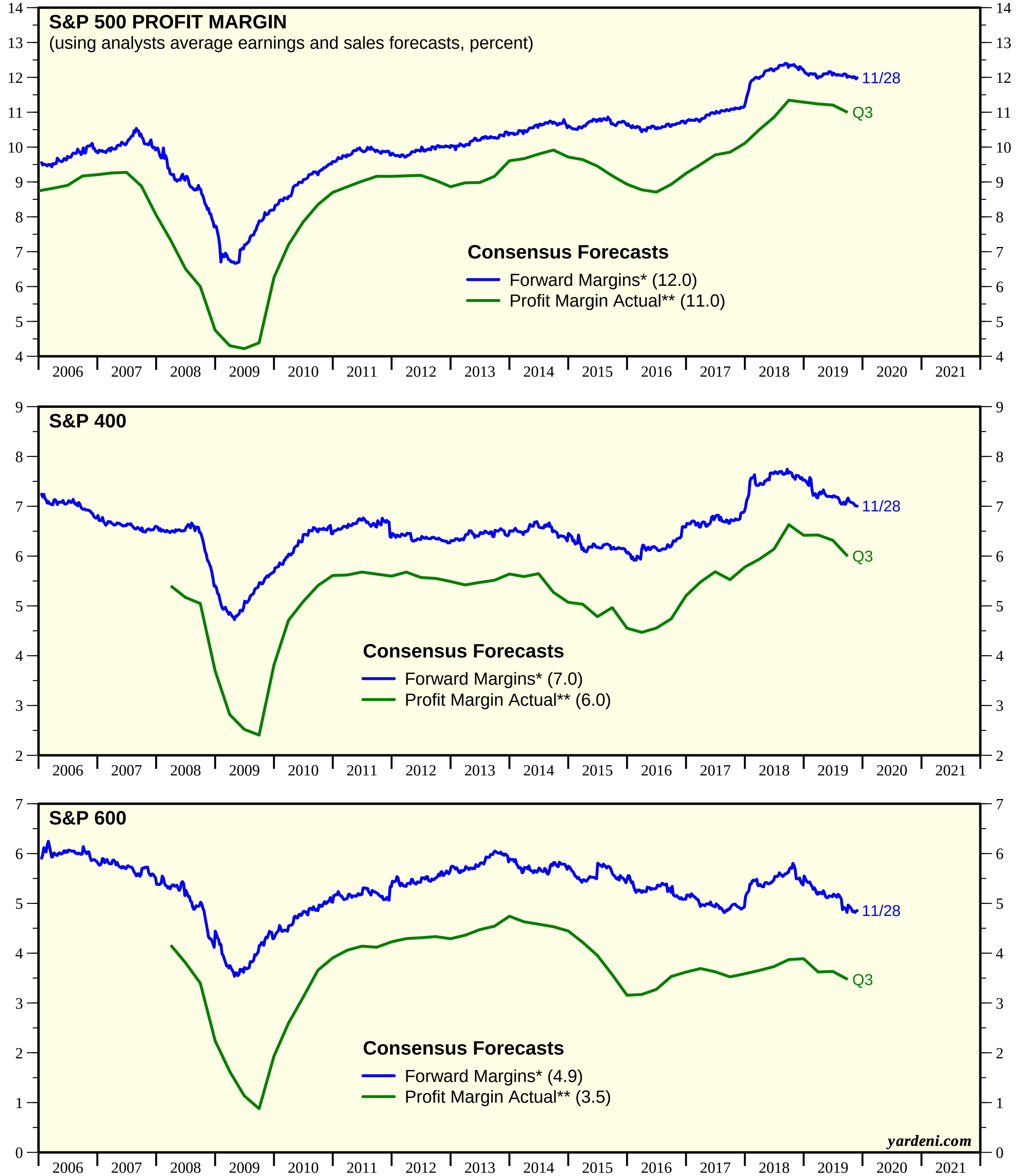
* Time-weighted average of consensus estimates for current year and next year. Monthly through December 2005, then weekly.
Source: I/B/E/S data by Refinitiv.

Figure 8.



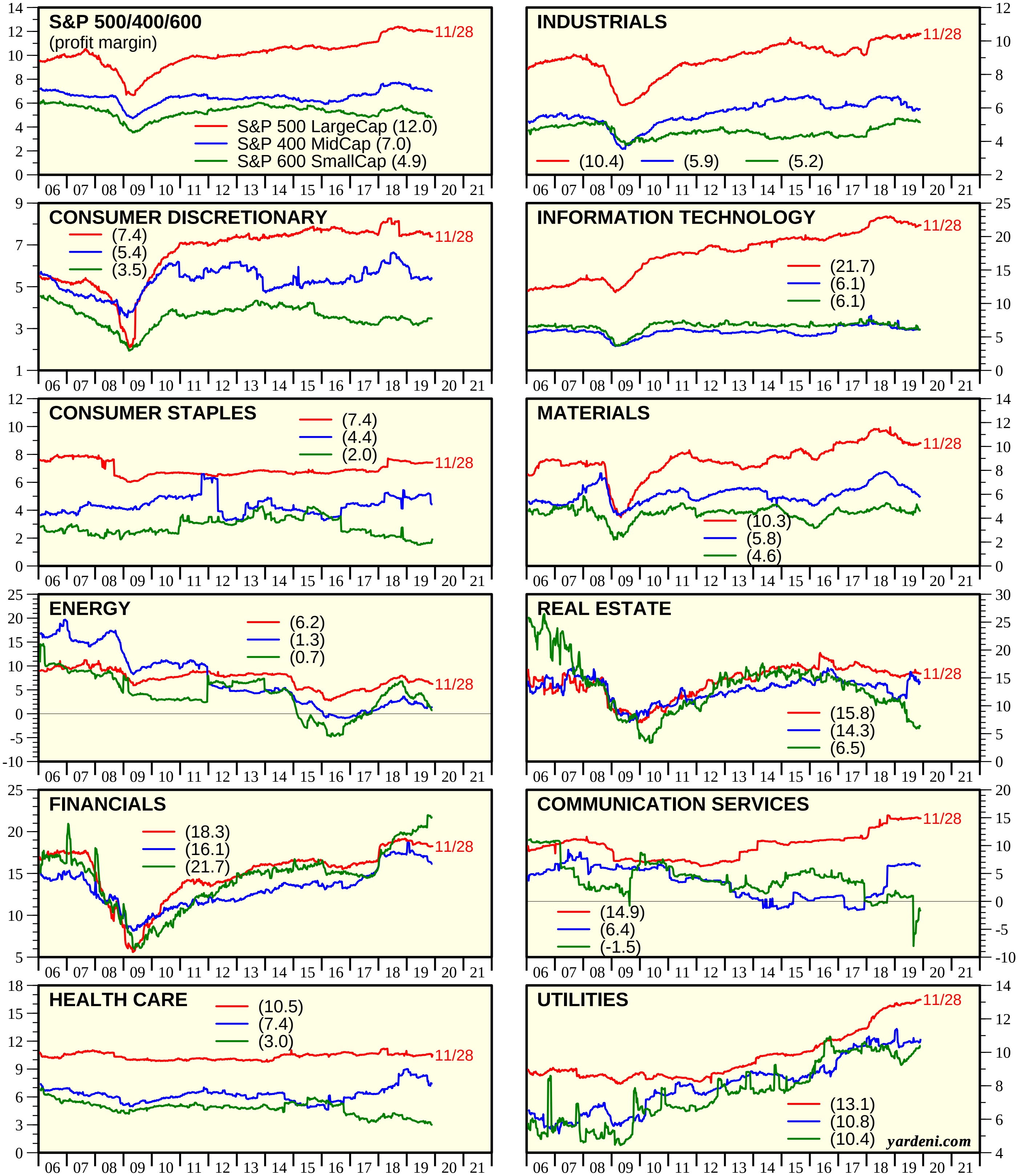
* Time-weighted average of consensus estimates for current year and next year.
Source: I/B/E/S data by Refinitiv.

Figure 9.



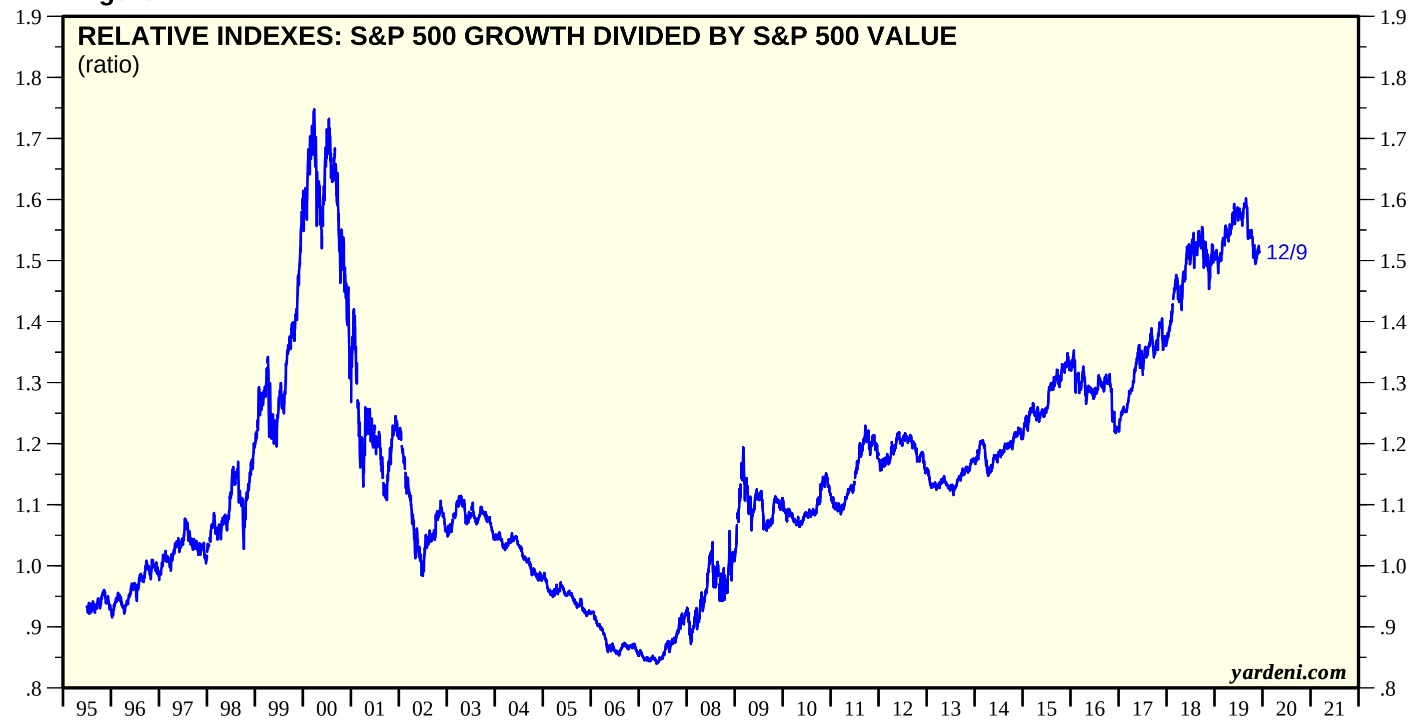
* Time-weighted average of the consensus estimates for current and next year.
** Trailing four-quarter based on operating EPS from S&P.
Source: I/B/E/S data by Refinitiv and Standard & Poor's.

Figure 10.



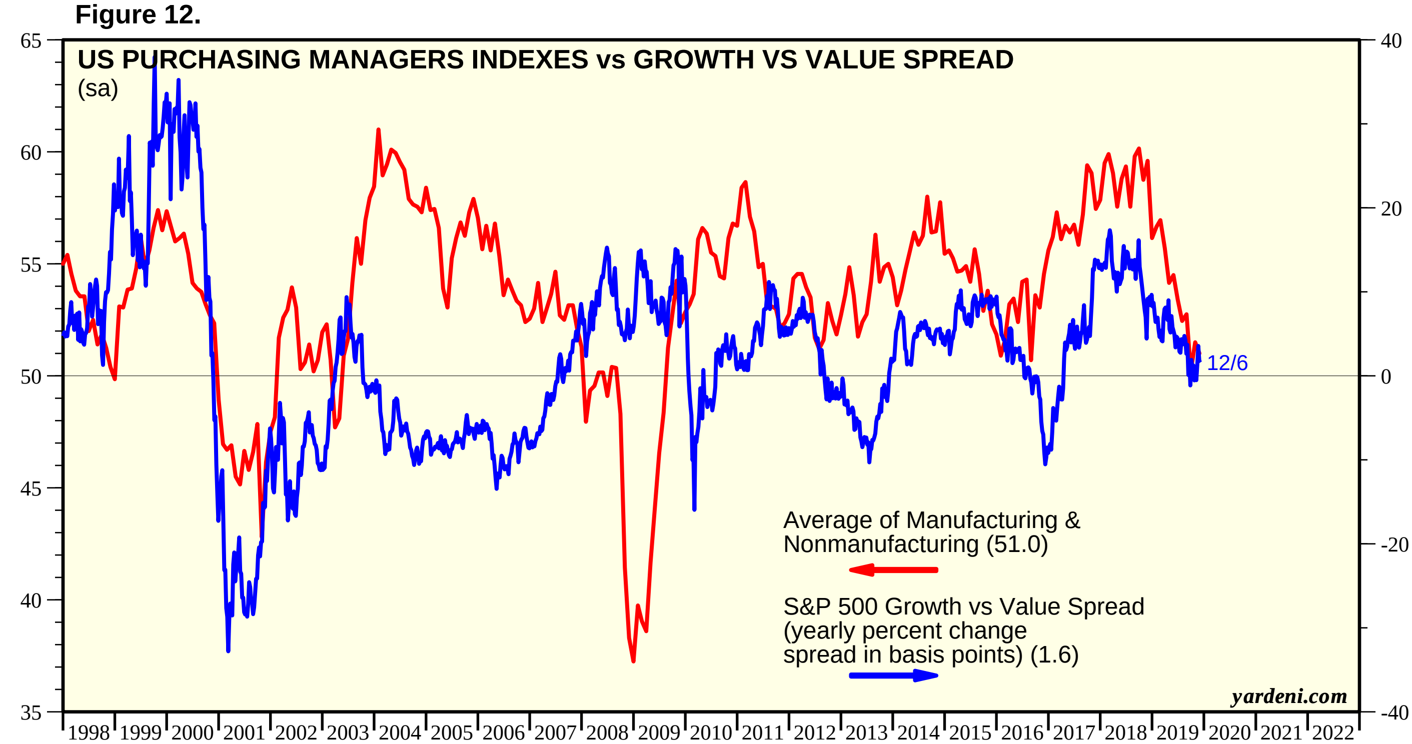
* Time-weighted average of the consensus estimates for current and next year.
Source: I/B/E/S data by Refinitiv.

Figure 11.



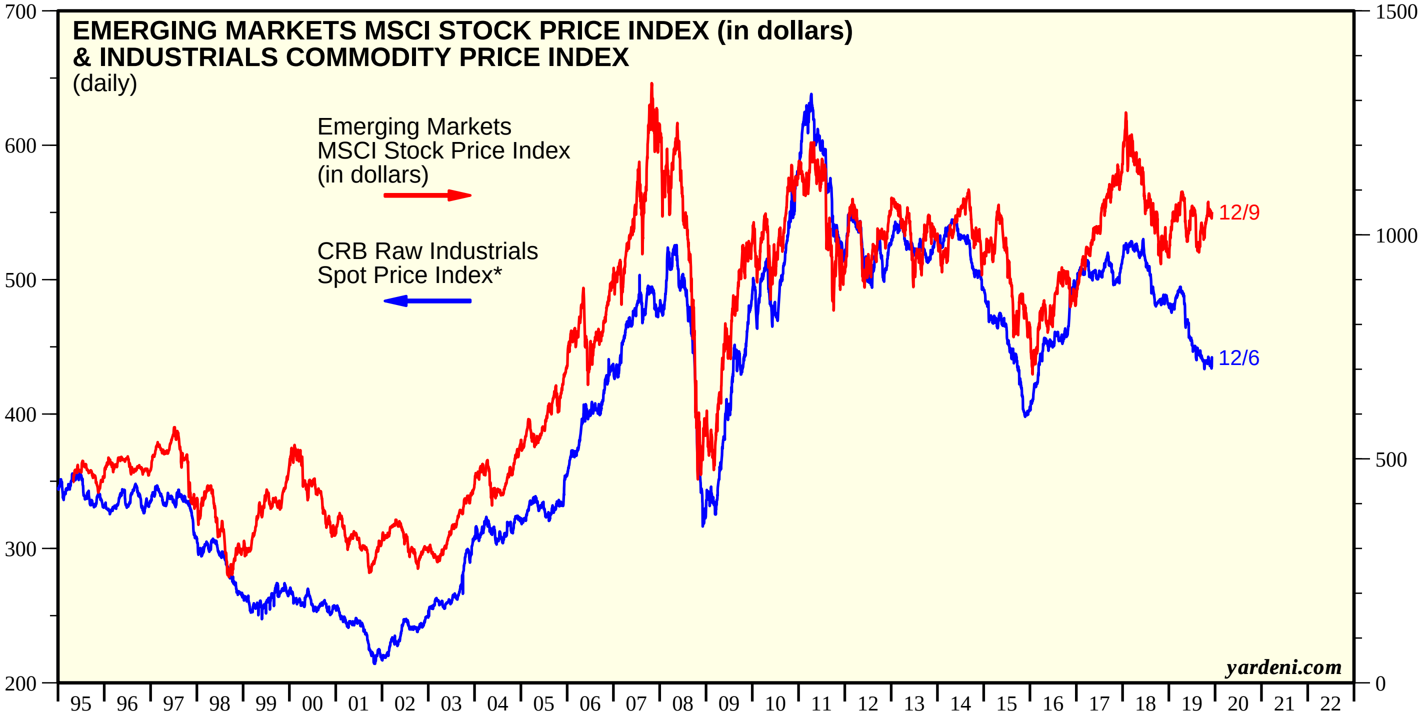
Source: Standard & Poor's and Haver Analytics.

Figure 12.



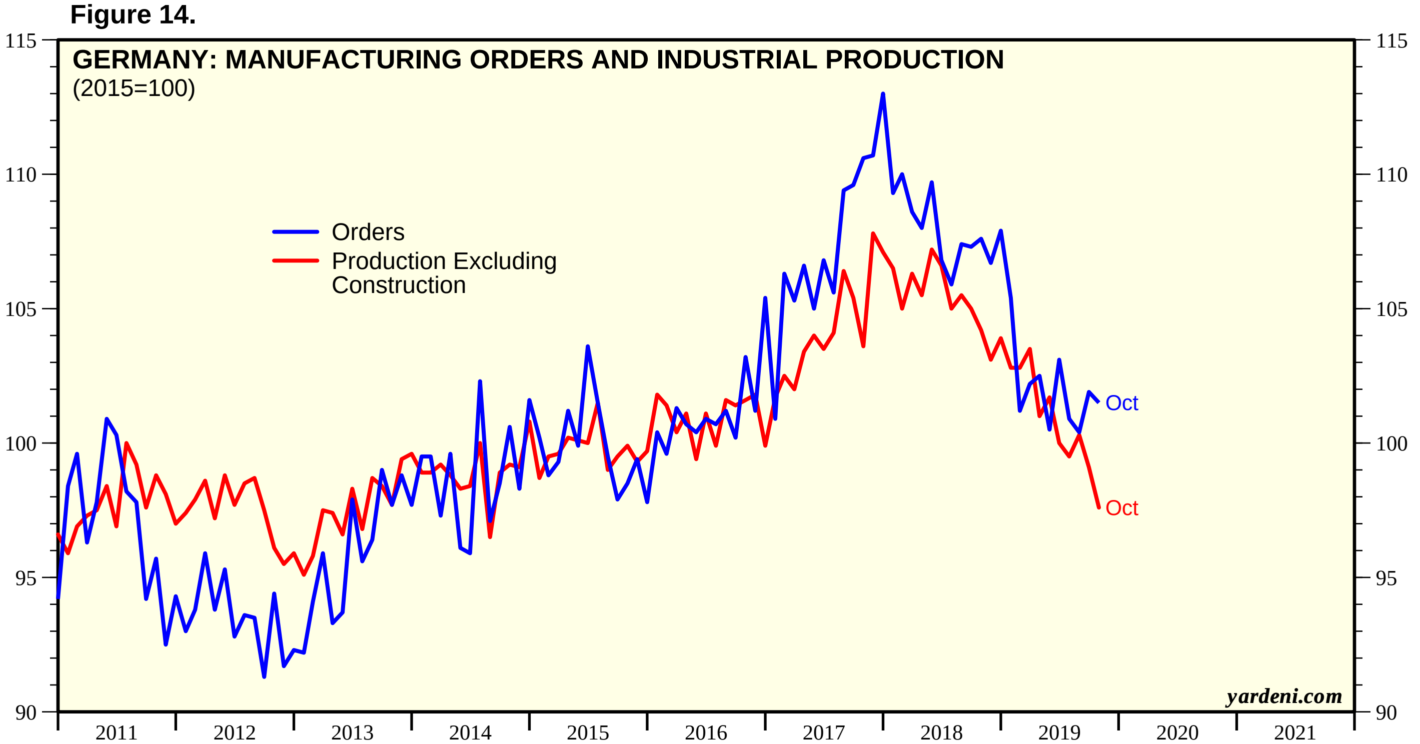
Source: Institute of Supply Management.

Figure 13.



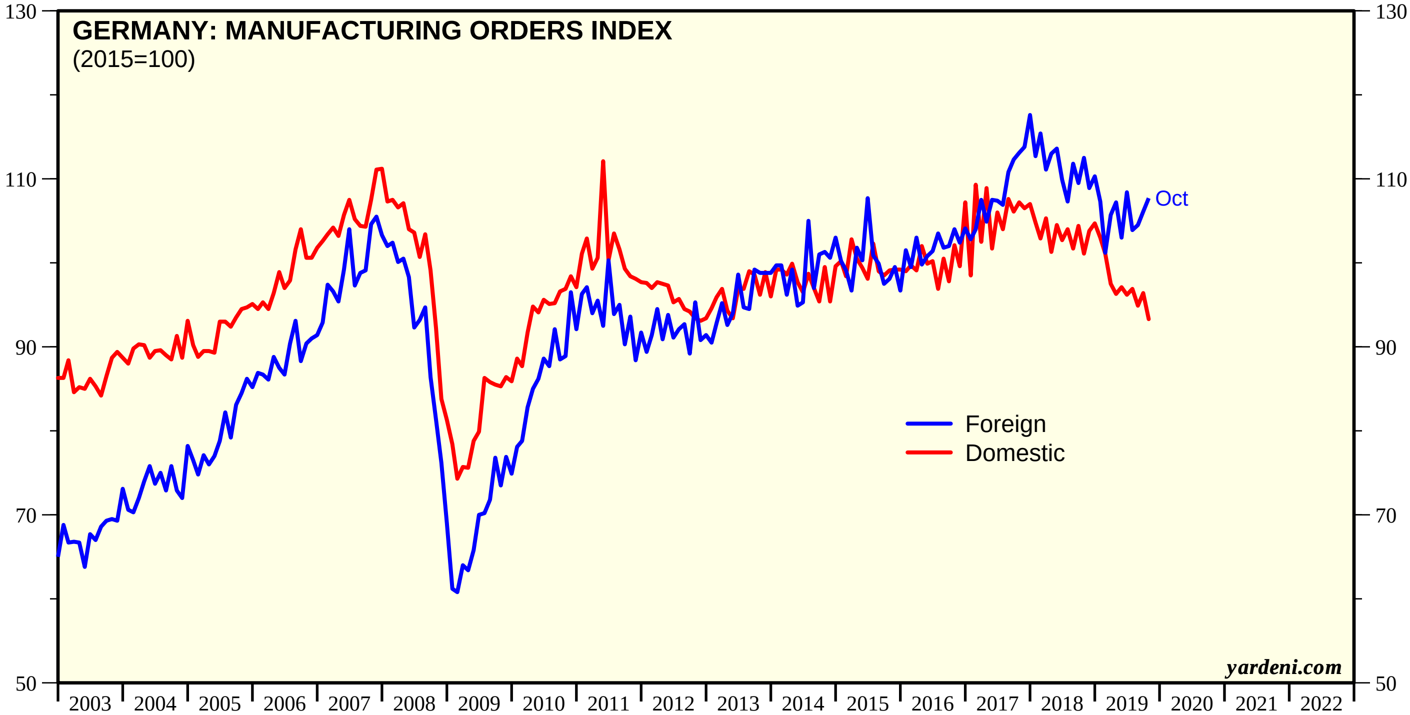
* Includes copper scrap, lead scrap, steel scrap, tin, zinc, burlap, cotton, print cloth, wool tops, hides, rosin, rubber, and tallow.
Source: Morgan Stanley Capital International and Commodity Research Bureau.

Figure 14.



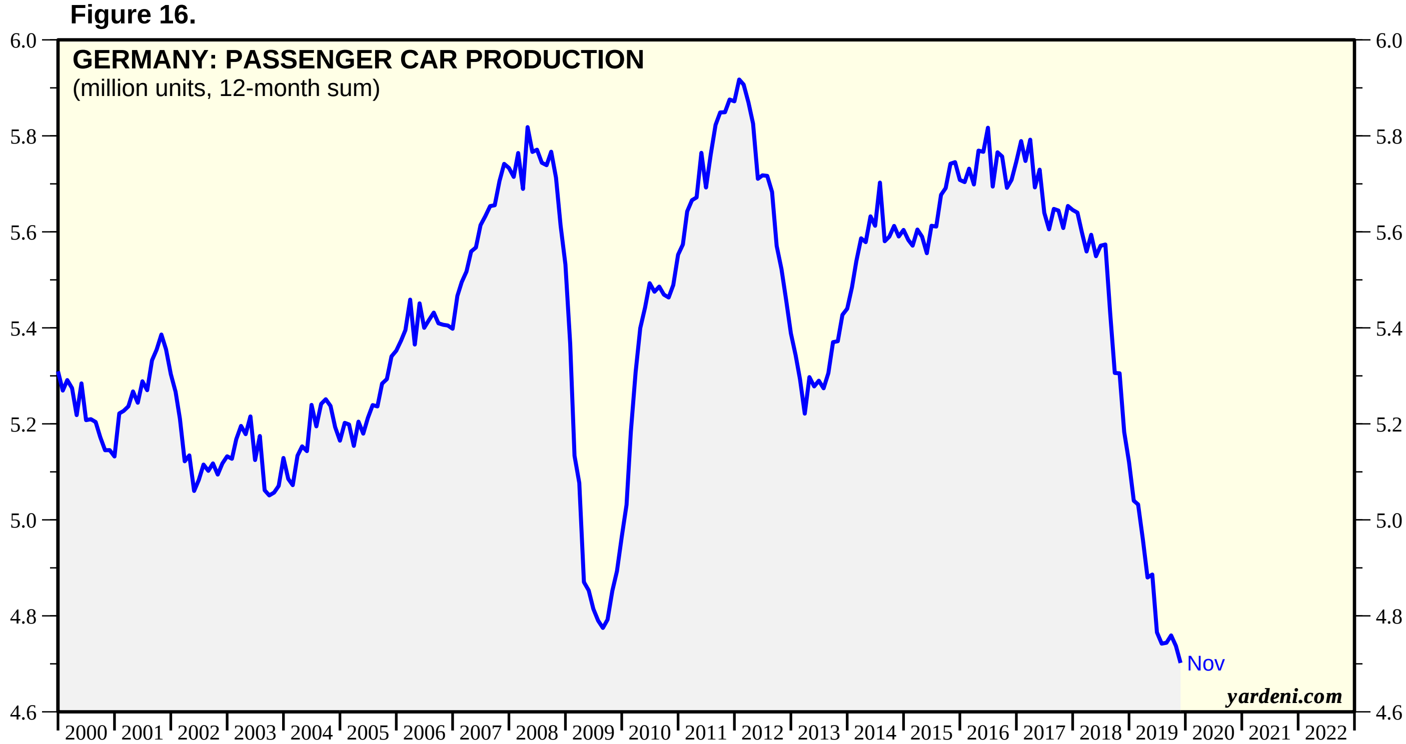
Source: Haver Analytics.

Figure 15.



Source: Deutsche Bundesbank.

Figure 16.



Source: Verband der automobilindustrie.