Chart Collection for Morning Briefing

Yardeni Research, Inc.

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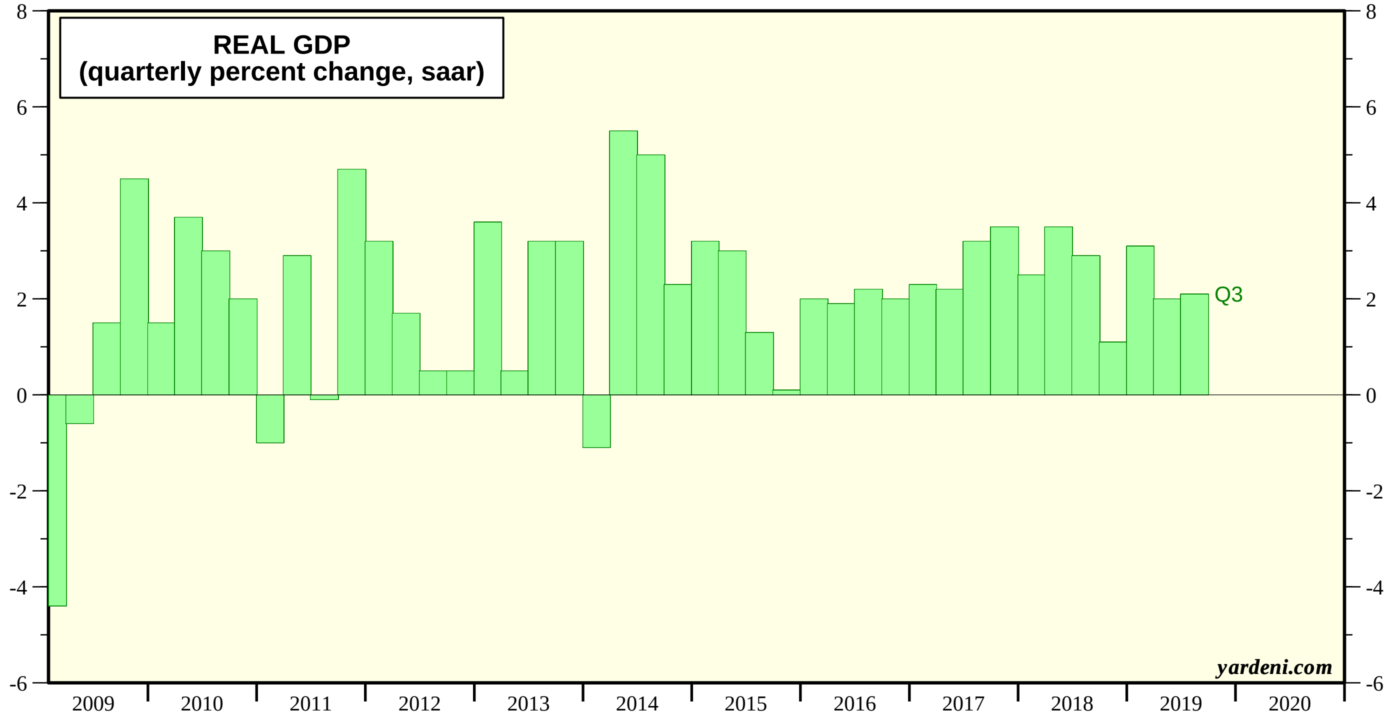
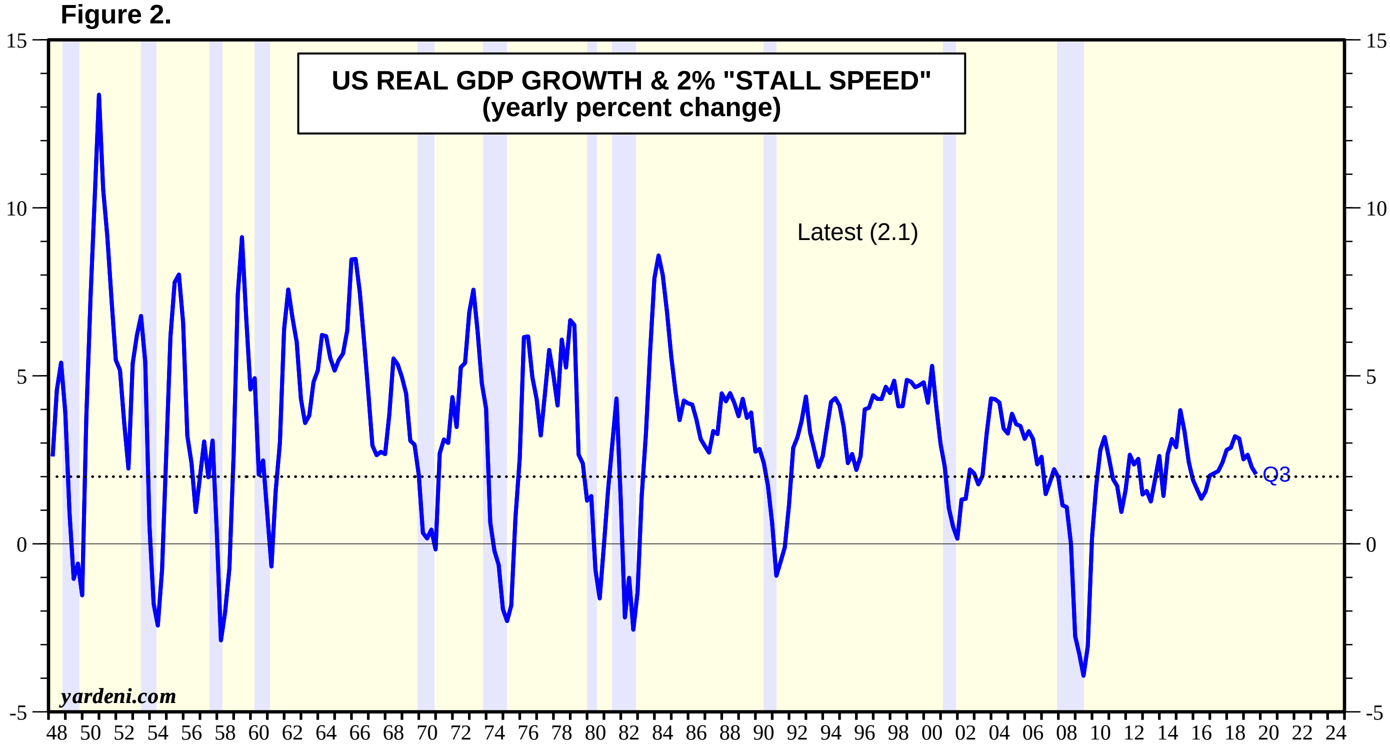
thinking outside the box

Figure 1.



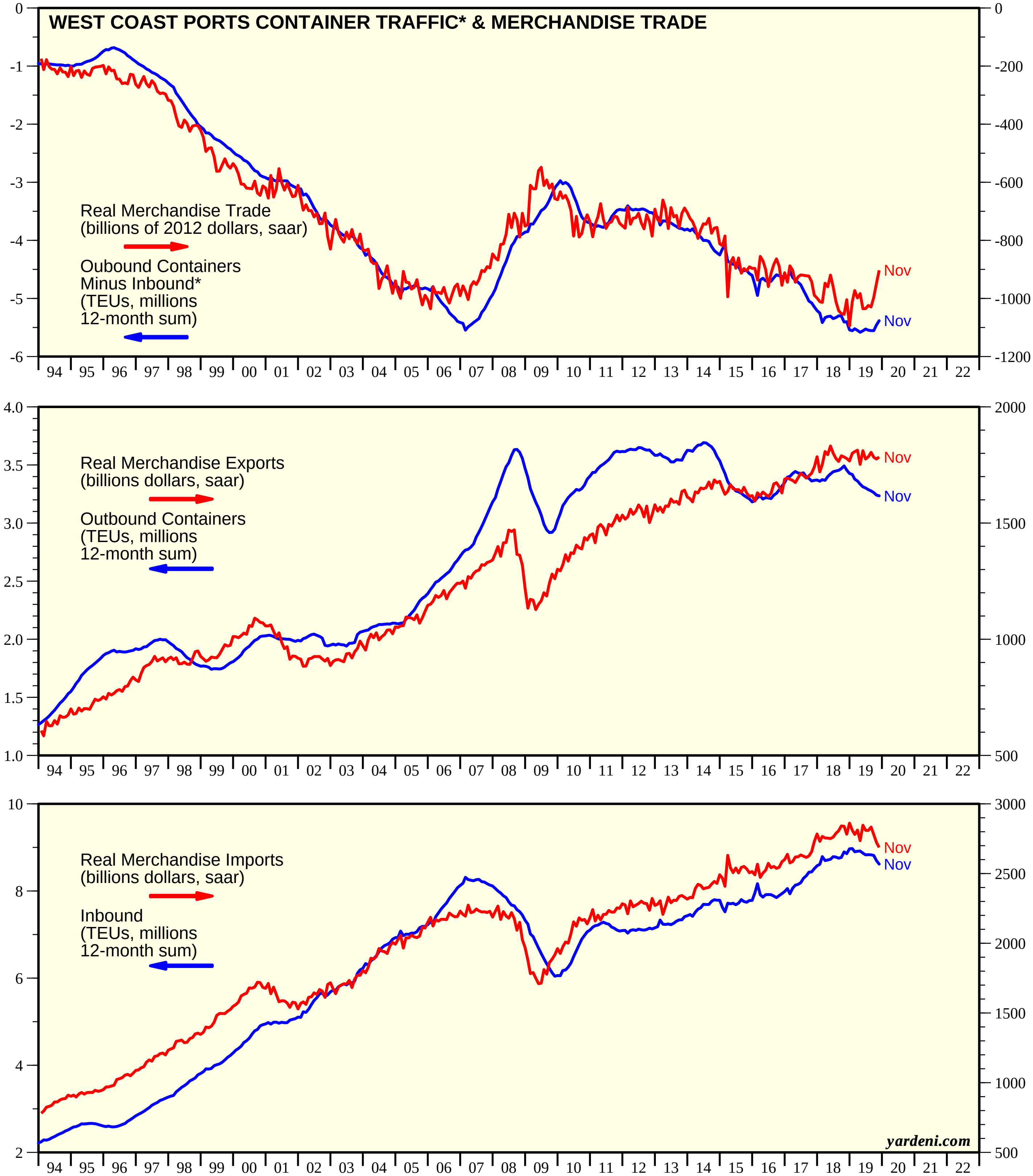
Note: Blue shaded areas denote first quarter of each year.
Source: Bureau of Economic Analysis.

Figure 2.



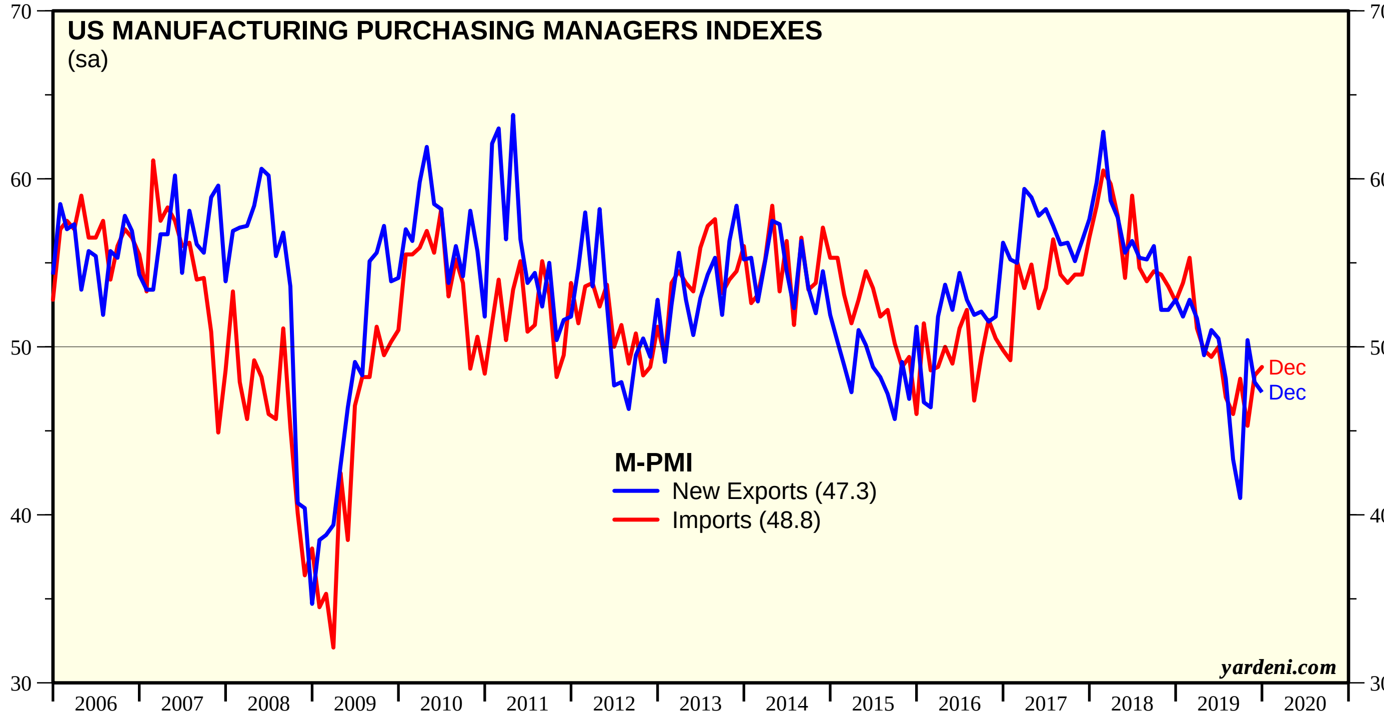
Note: Shaded areas denote recessions according to the National Bureau of Economic Research. Dotted line is 2% "stall speed."
Source: Bureau of Economic Analysis.

Figure 3.



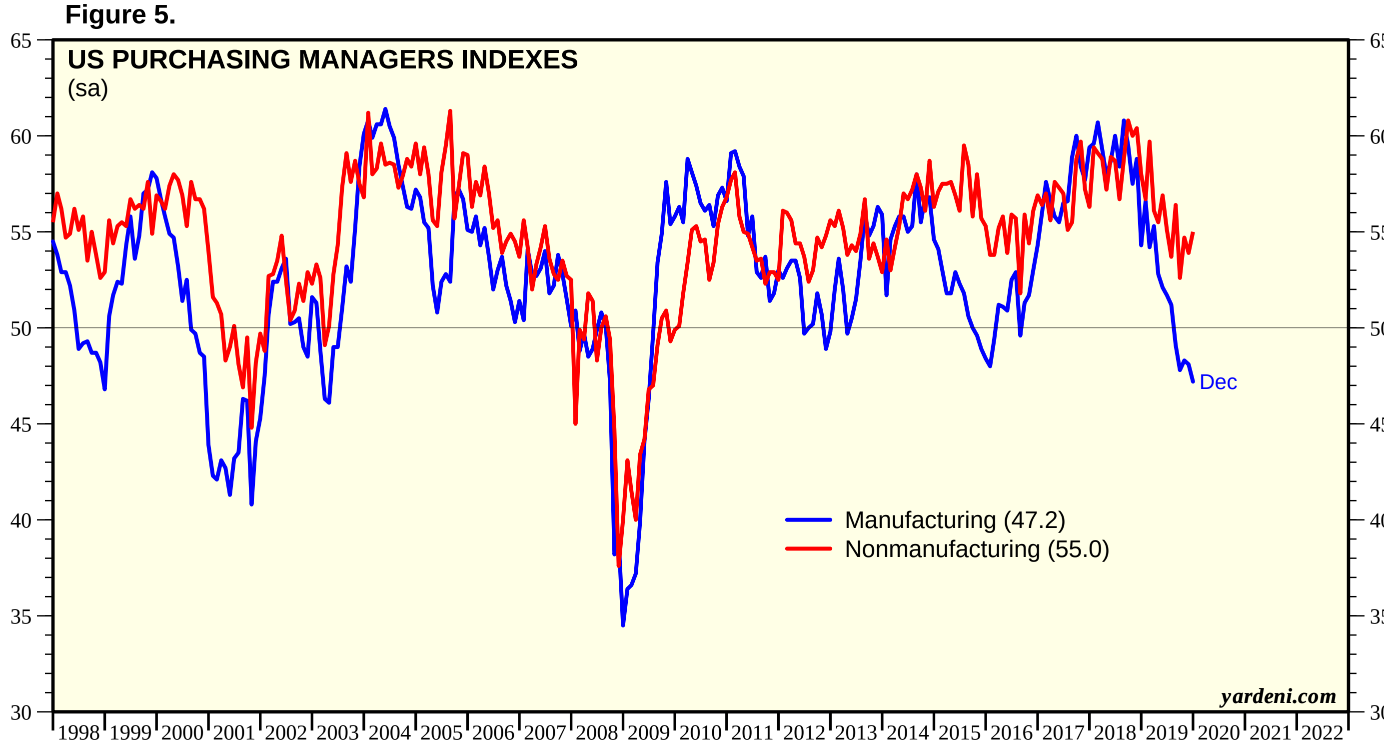
*Sum of Port of Los Angeles and Port of Long Beach Loaded Containers. TEUs=20-foot equivalent units.
Source: Ports of Los Angeles and Long Beach and Bureau of Economic Analysis.

Figure 4.



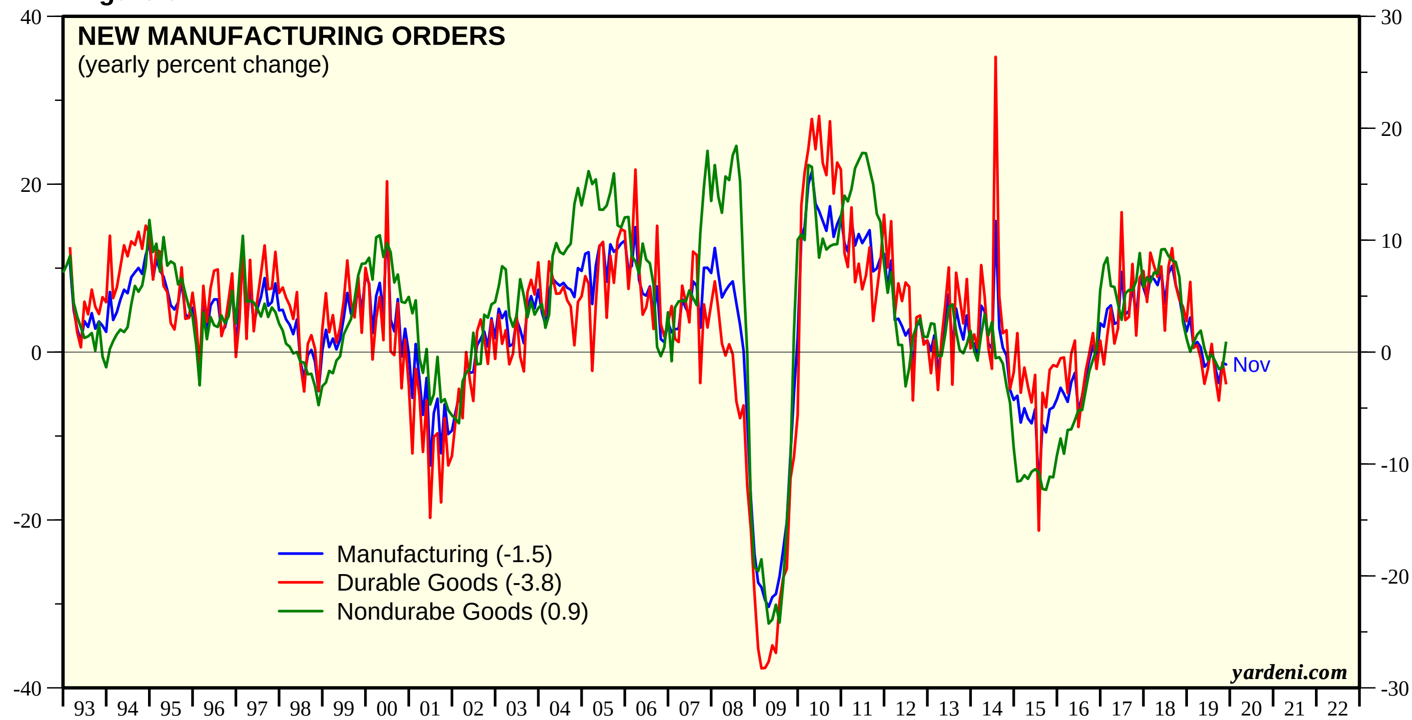
Source: Institue of Supply Management.

Figure 5.



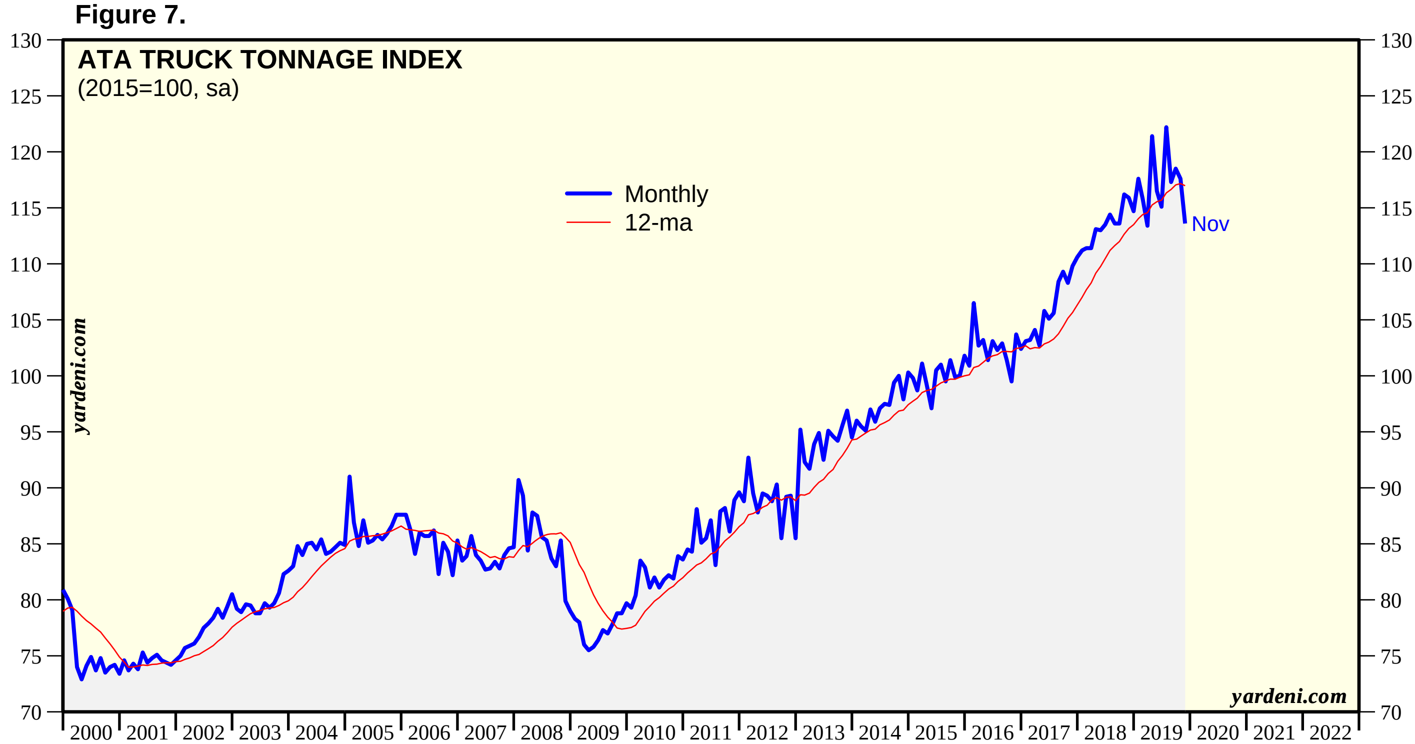
Source: Institute of Supply Management.

Figure 6.



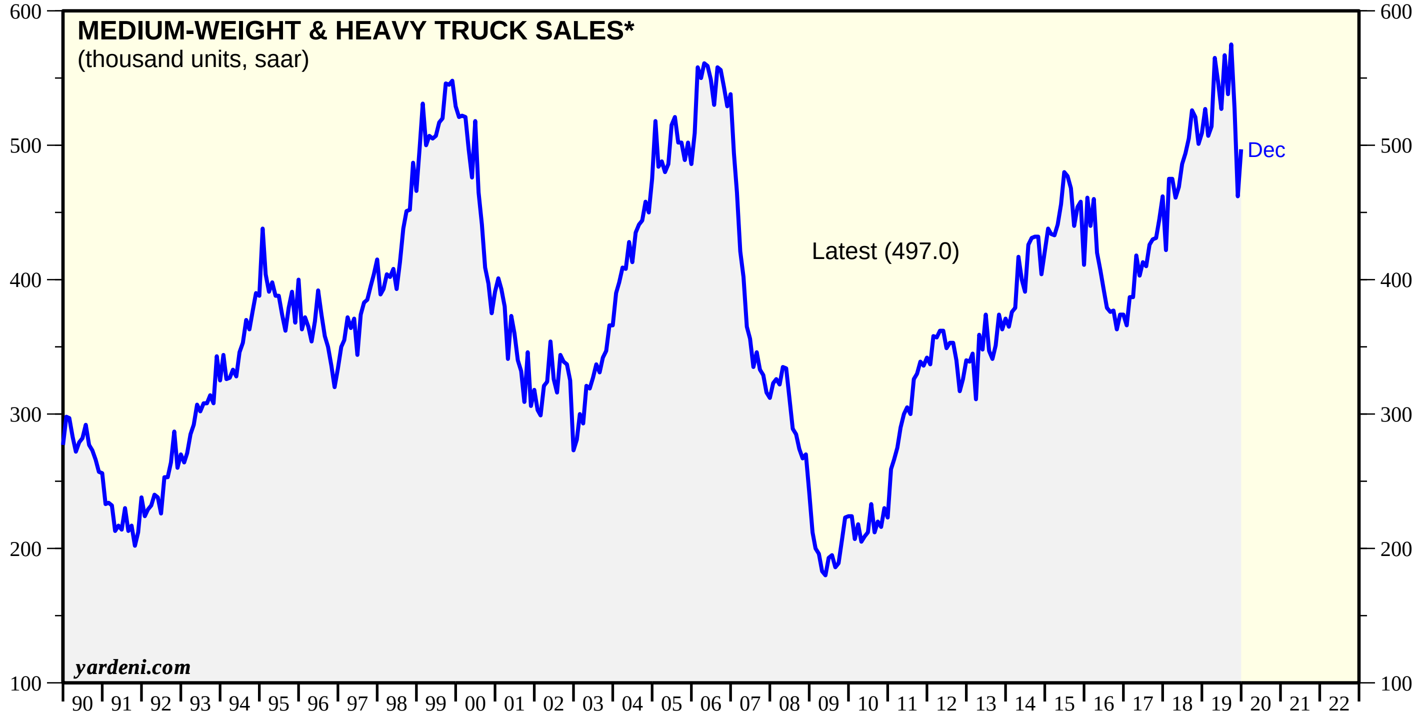
Source: Census Bureau

Figure 7.



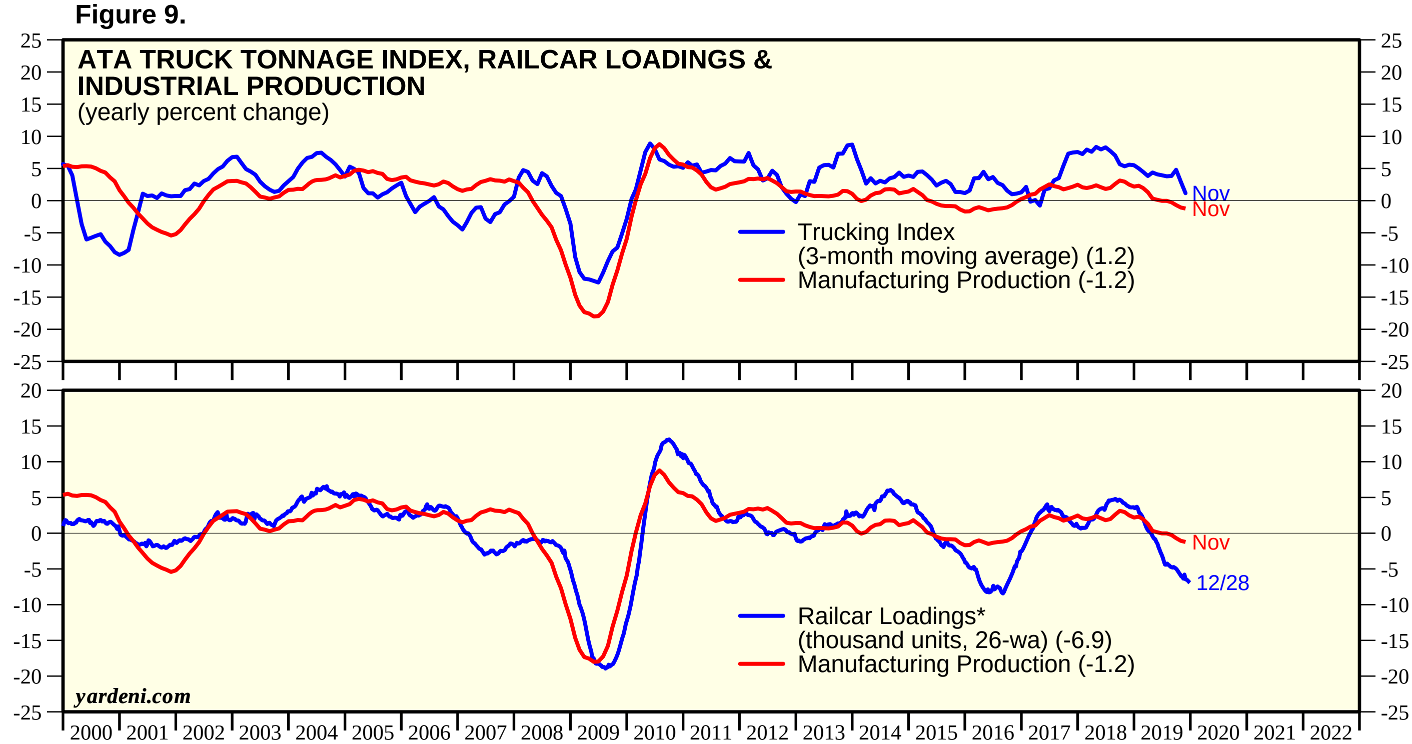
Source: American Trucking Association.

Figure 8.



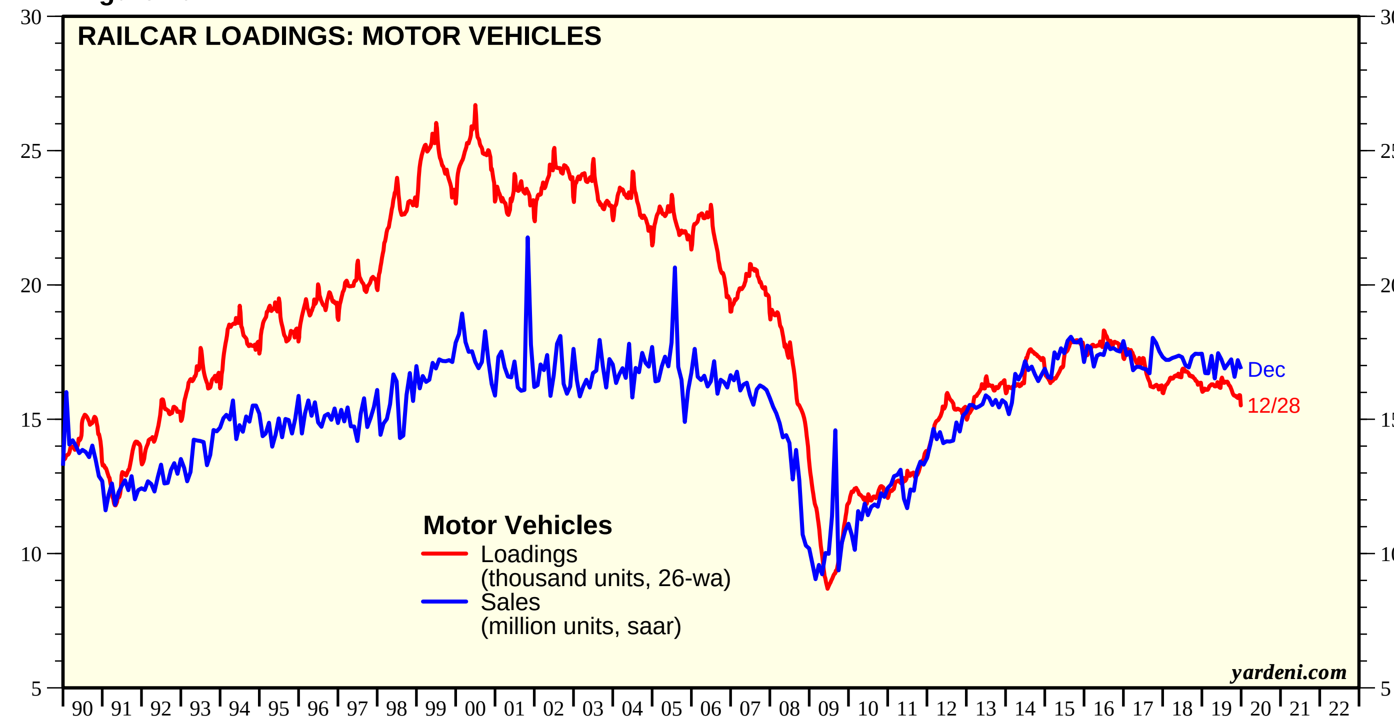
* Class III & IV trucks with a gross vehicle weight of more than 14,001 lbs.
Source: Bureau of Economic Analysis.

Figure 9.



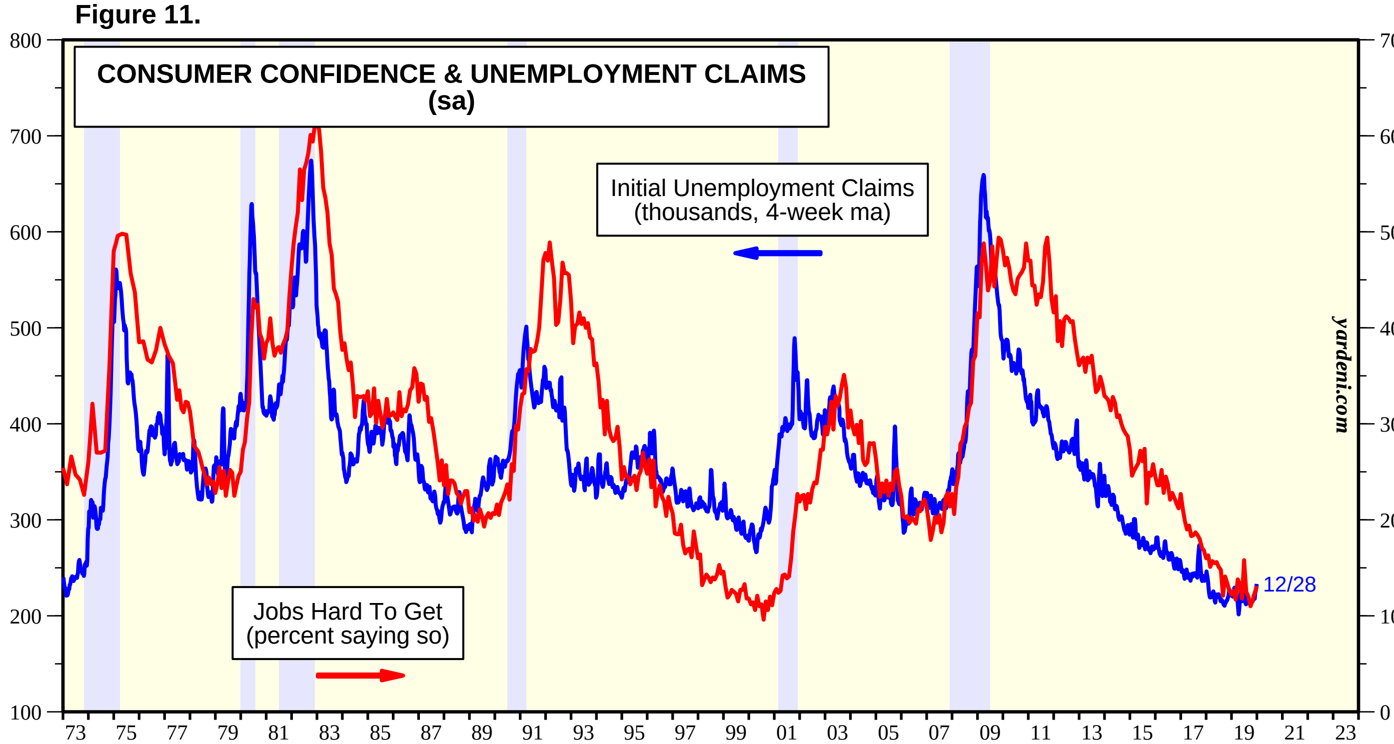
* Carloads plus intermodal.
Source: American Trucking Association, Atlantic Systems, and Bureau of Economic Analysis.

Figure 10.



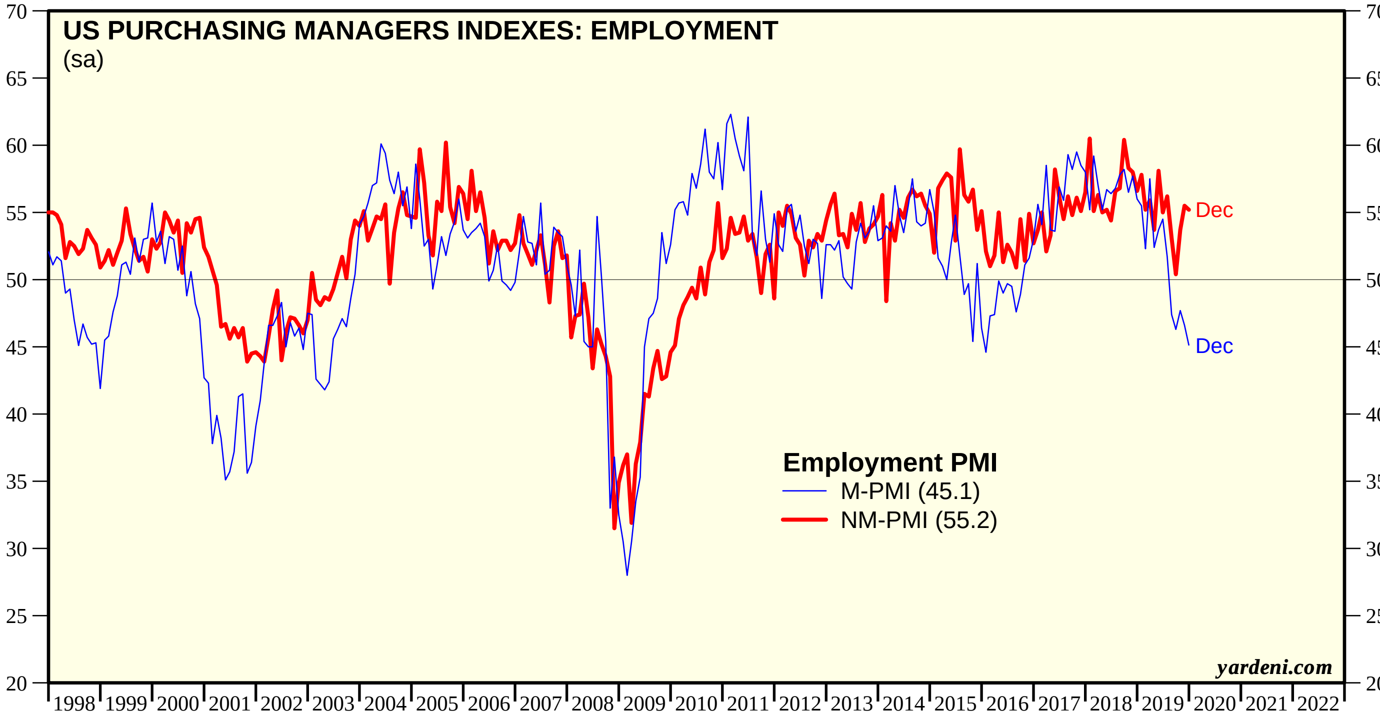
Source: Atlantic Systems and Haver Analytics.

Figure 11.



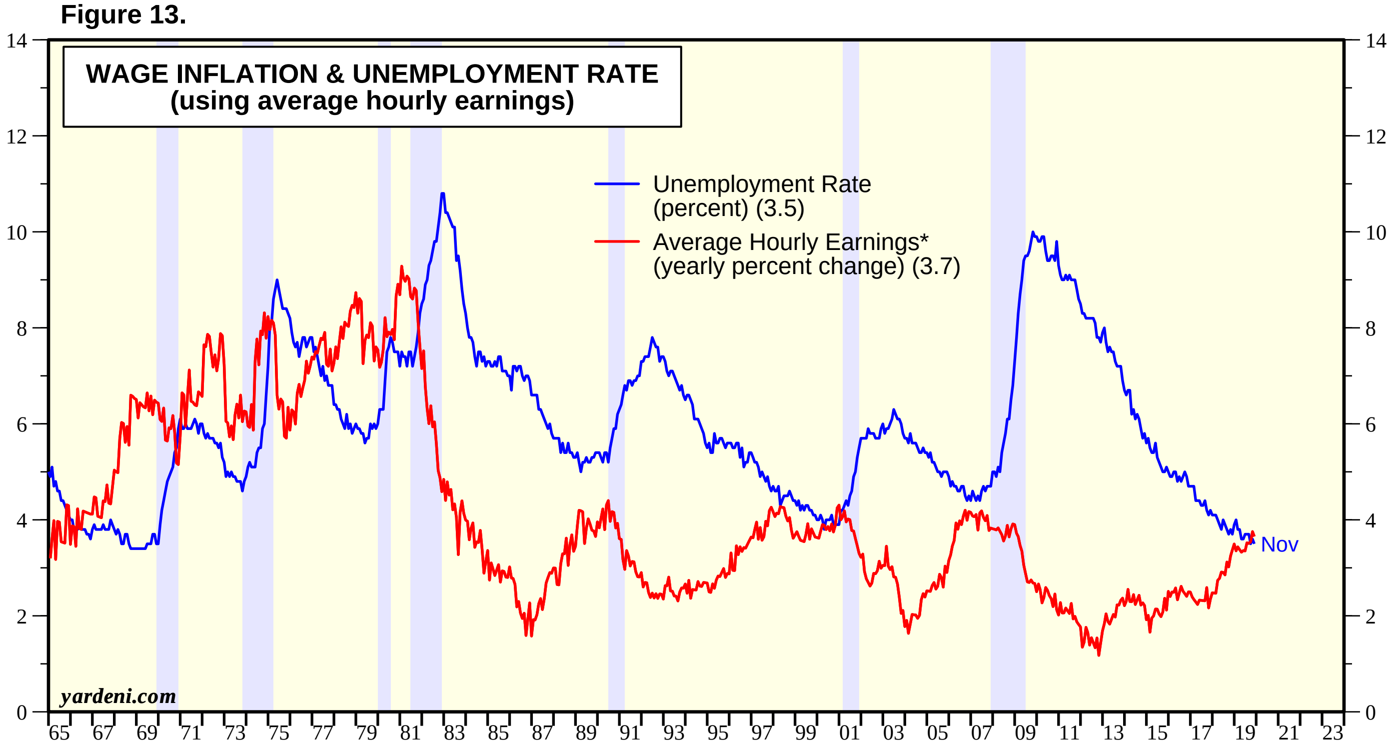
Note: Shaded areas denote recessions according to the National Bureau of Economic Research.
Source: The Conference Board and US Department of Labor.

Figure 12.



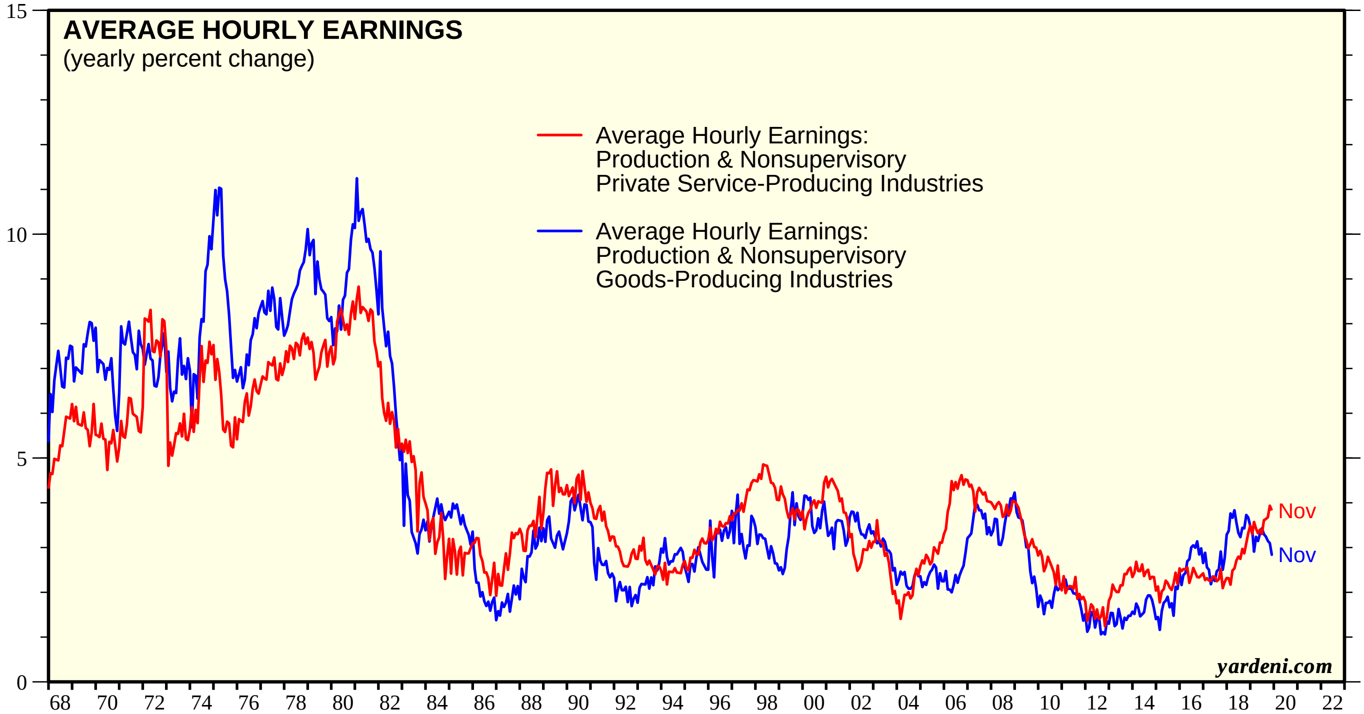
Source: Institute of Supply Management.

Figure 13.



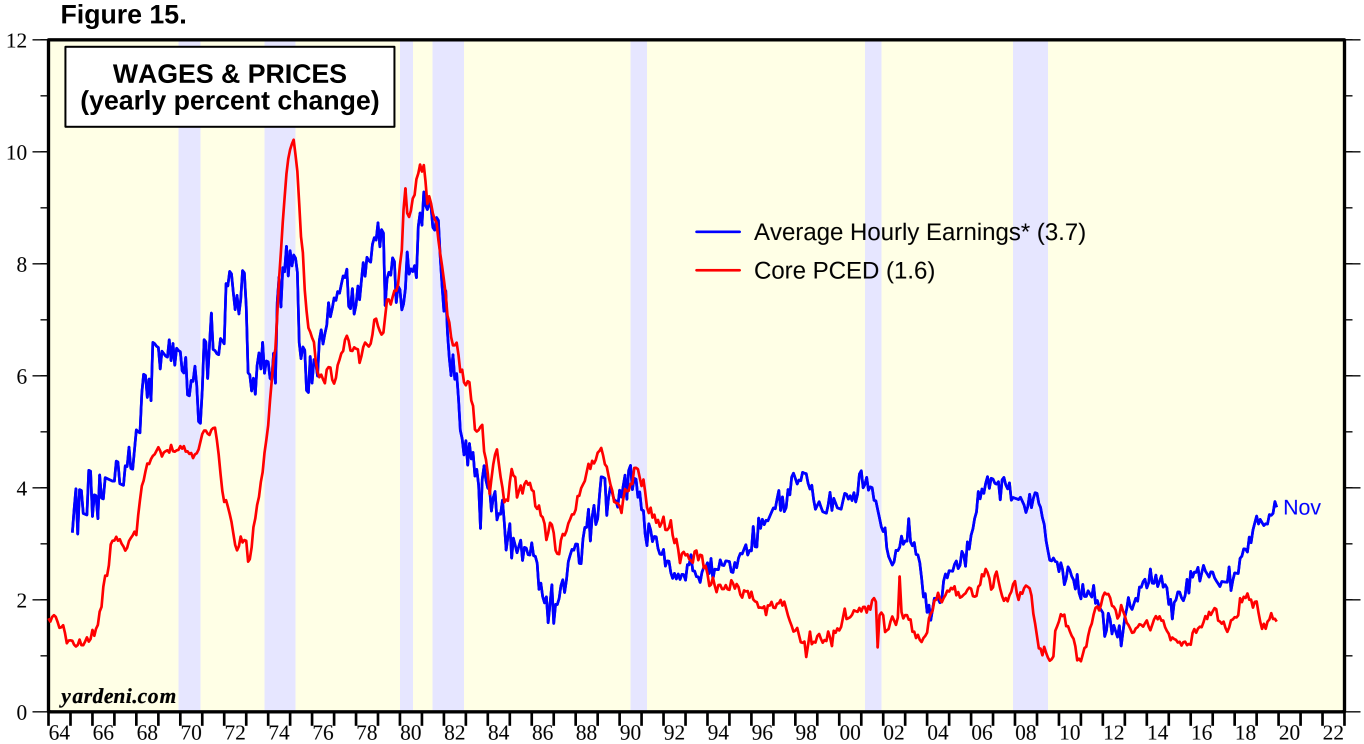
* Production & nonsupervisory workers in private sector.
Note: Shaded areas denote recessions according to the National Bureau of Economic Research.
Source: Bureau of Labor Statistics.

Figure 14.



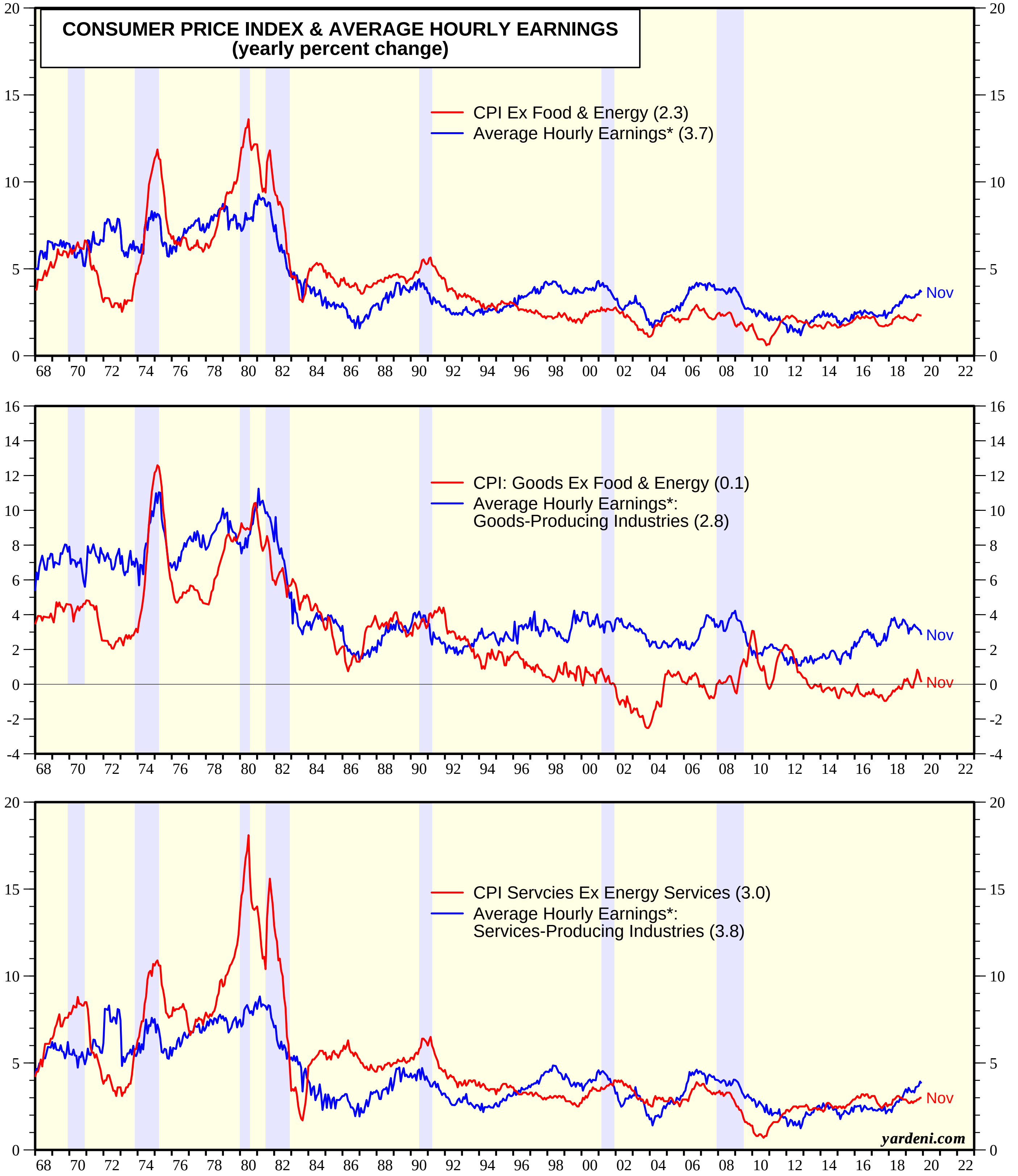
Source: Bureau of Labor Statistics.

Figure 15.



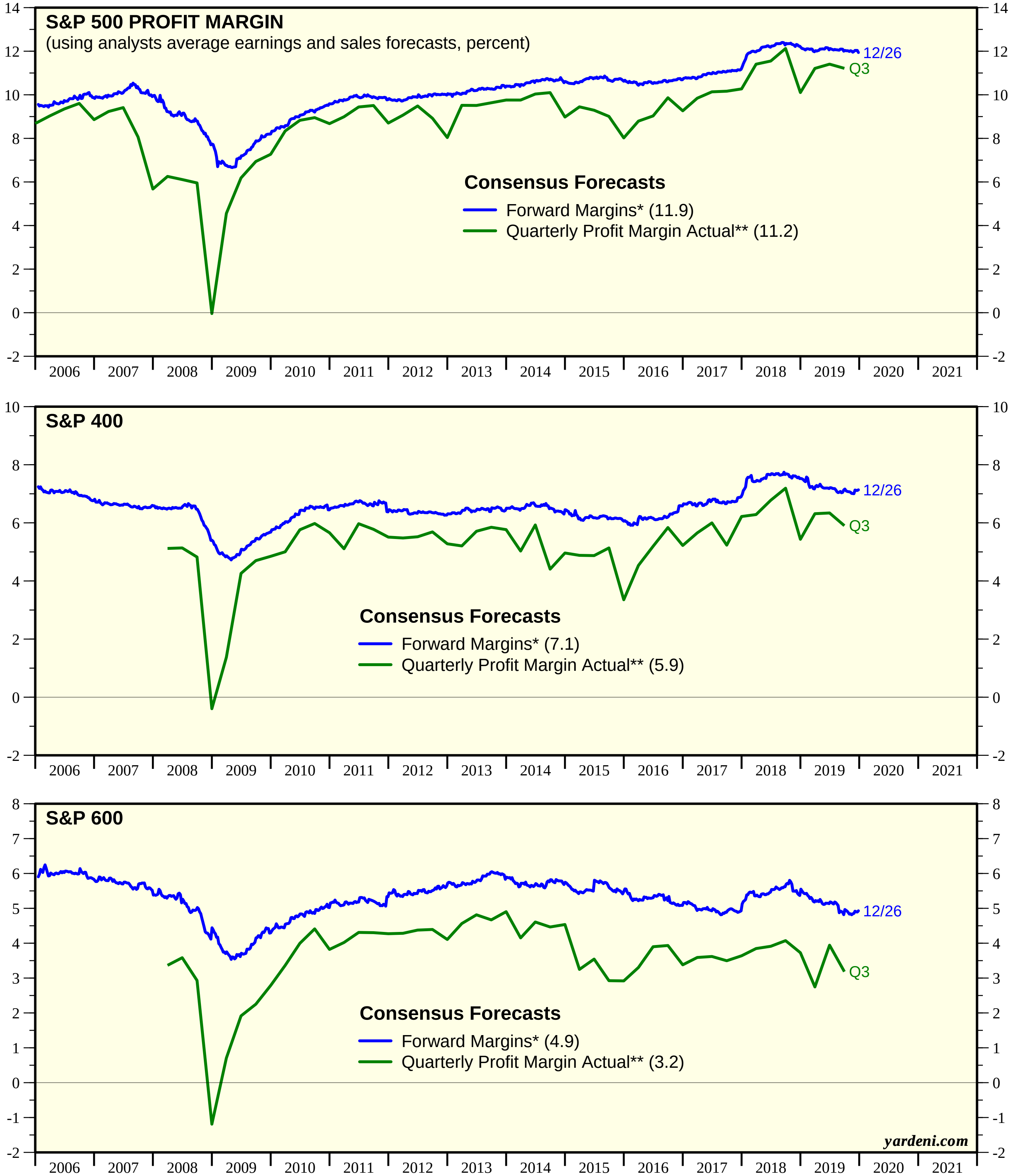
* Production & nonsupervisory workers
Note: Shaded areas denote recessions according to the National Bureau of Economic Research.
Source: Bureau of Labor Statistics.

Figure 16.



*Production & nonsupervisory workers in private sector.
Note: Shaded areas denote recessions according to the National Bureau of Economic Research.
Source: Bureau of Labor Statistics.

Figure 17.



* 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.