Chart Collection for Morning Briefing

Yardeni Research, Inc.

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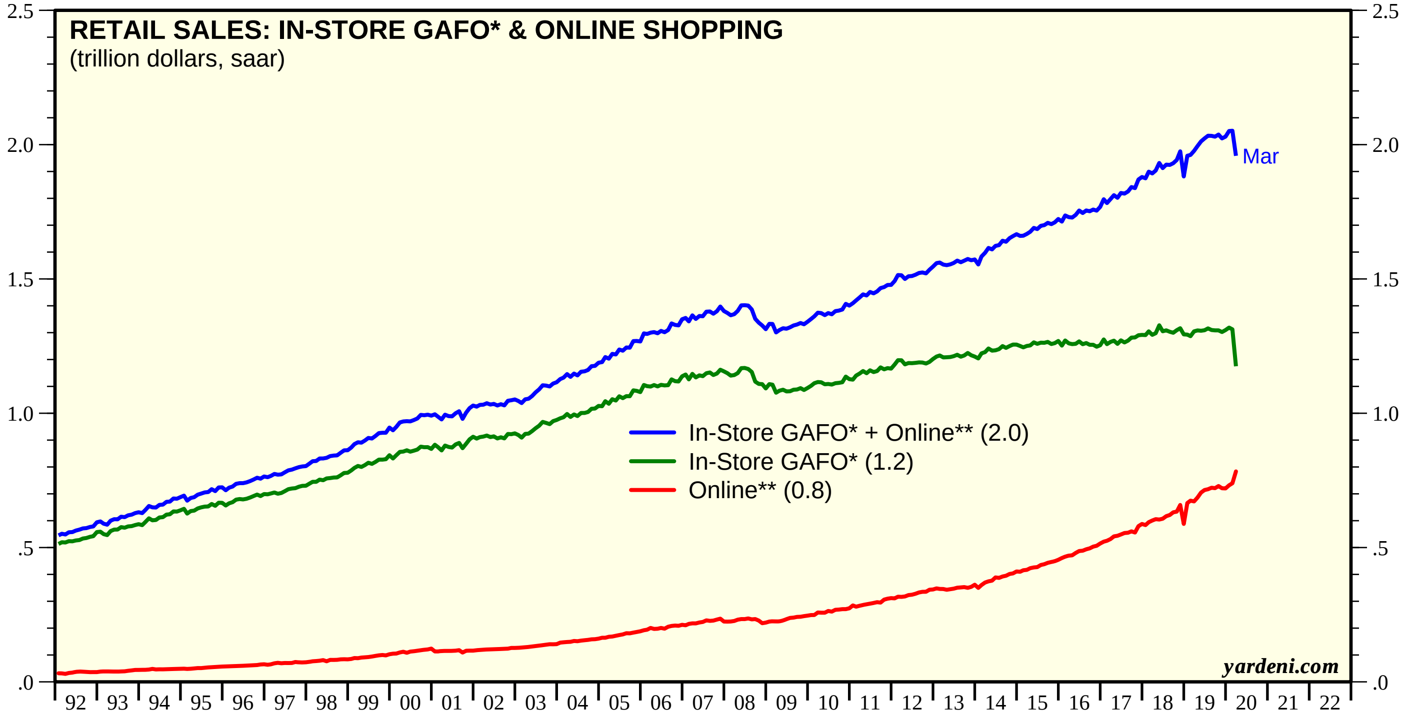
thinking outside the box

Figure 1.



* GAFO (general merchandise, apparel and accessories, furniture, and other sales) includes retailers that specialize in department-store types of merchandise such as furniture & home furnishings, electronics & appliances, clothing & accessories, sporting goods, hobby, book, and music, general merchandise, office supply, stationery, and gift stores.
** Electronic shopping and mail order houses.
Source: Census Bureau and Haver Analytics.

Figure 2.

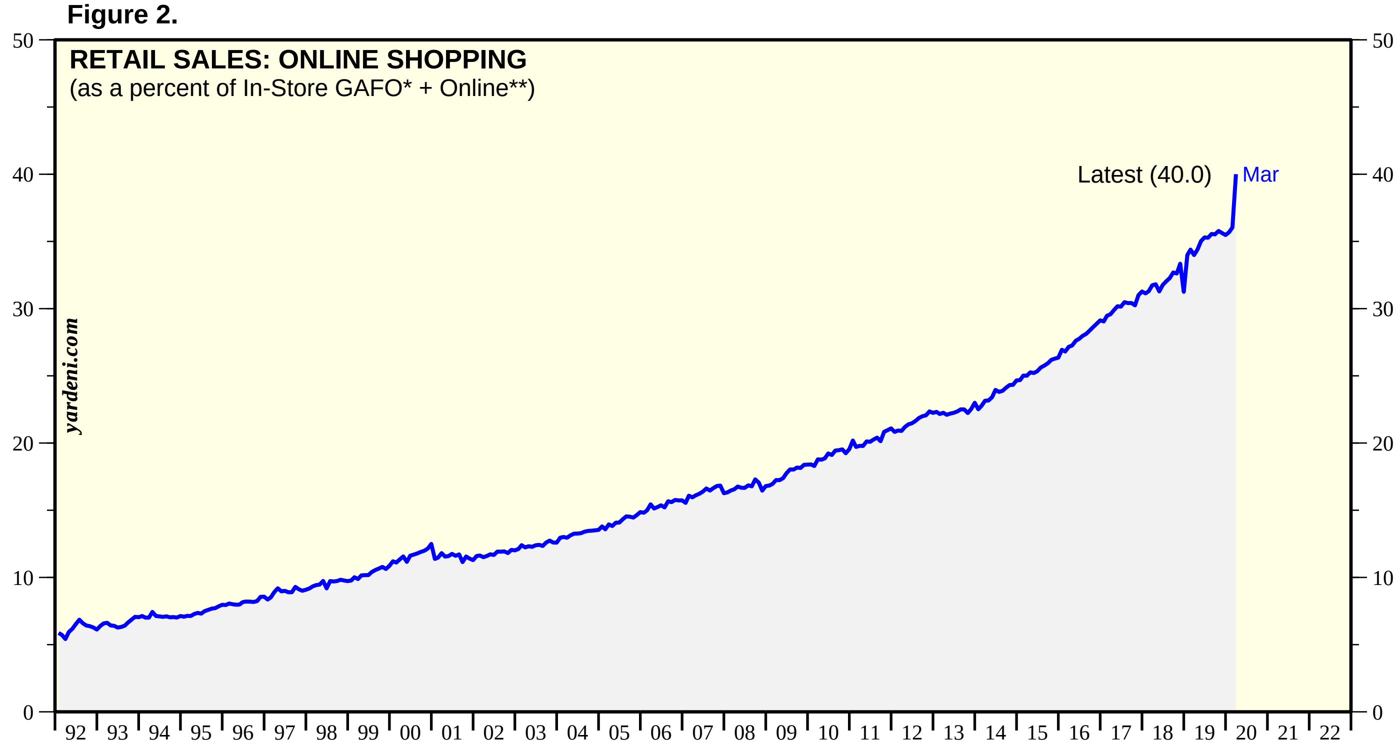


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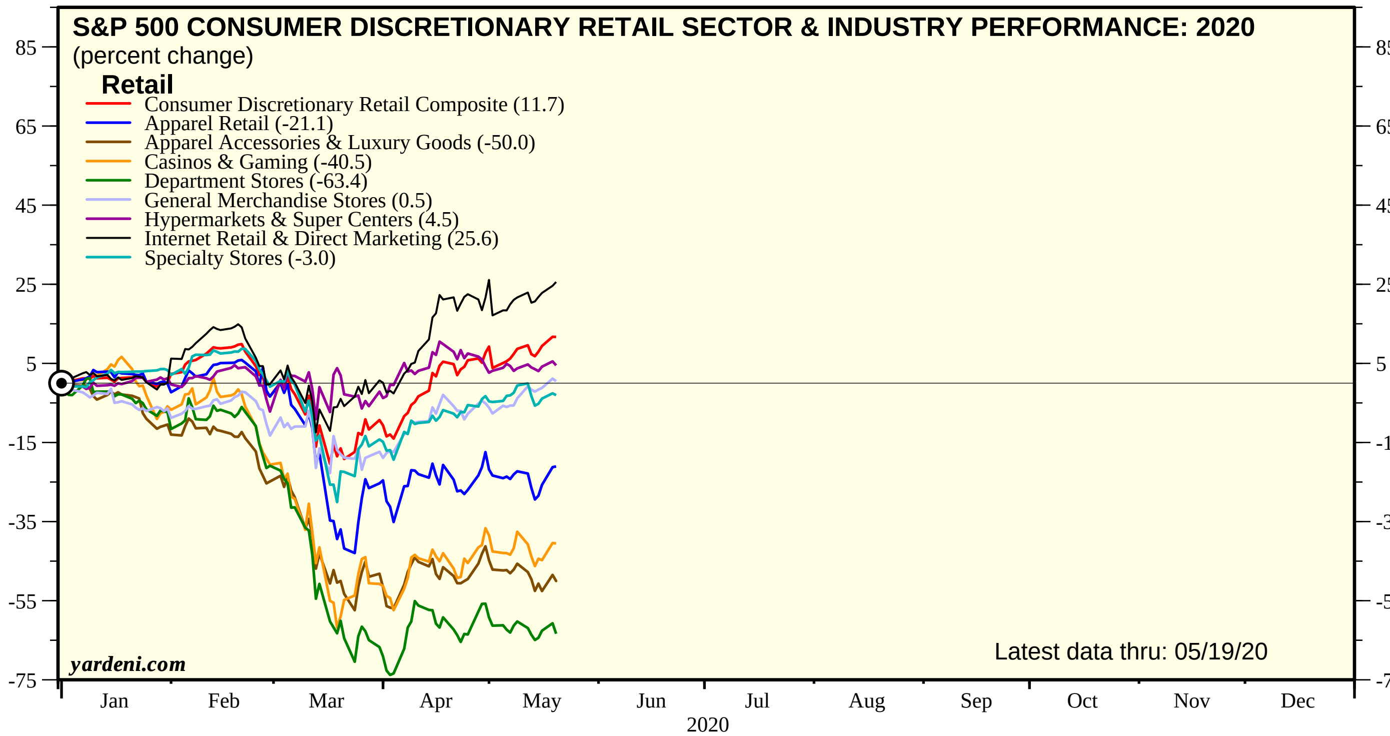
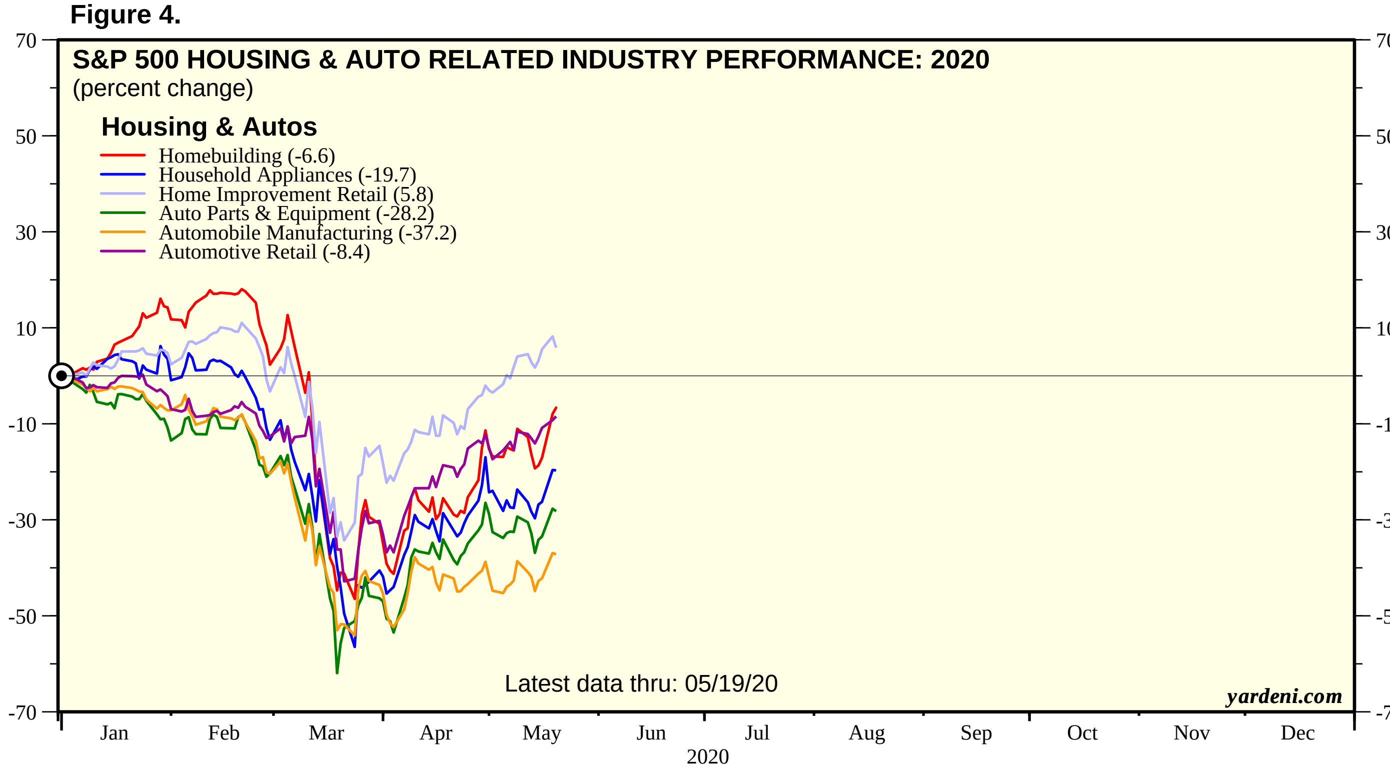
Figure 3.



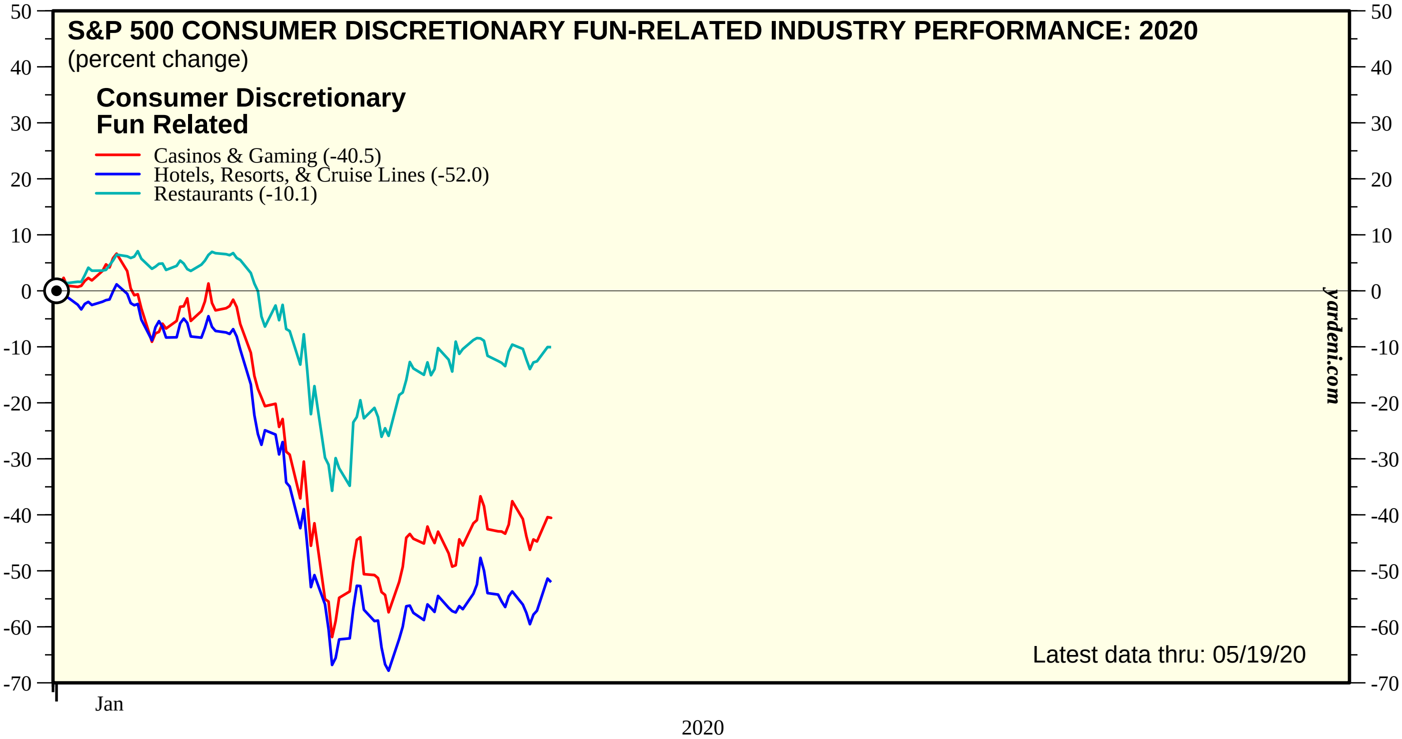
Source: Standard & Poor's.

Figure 4.



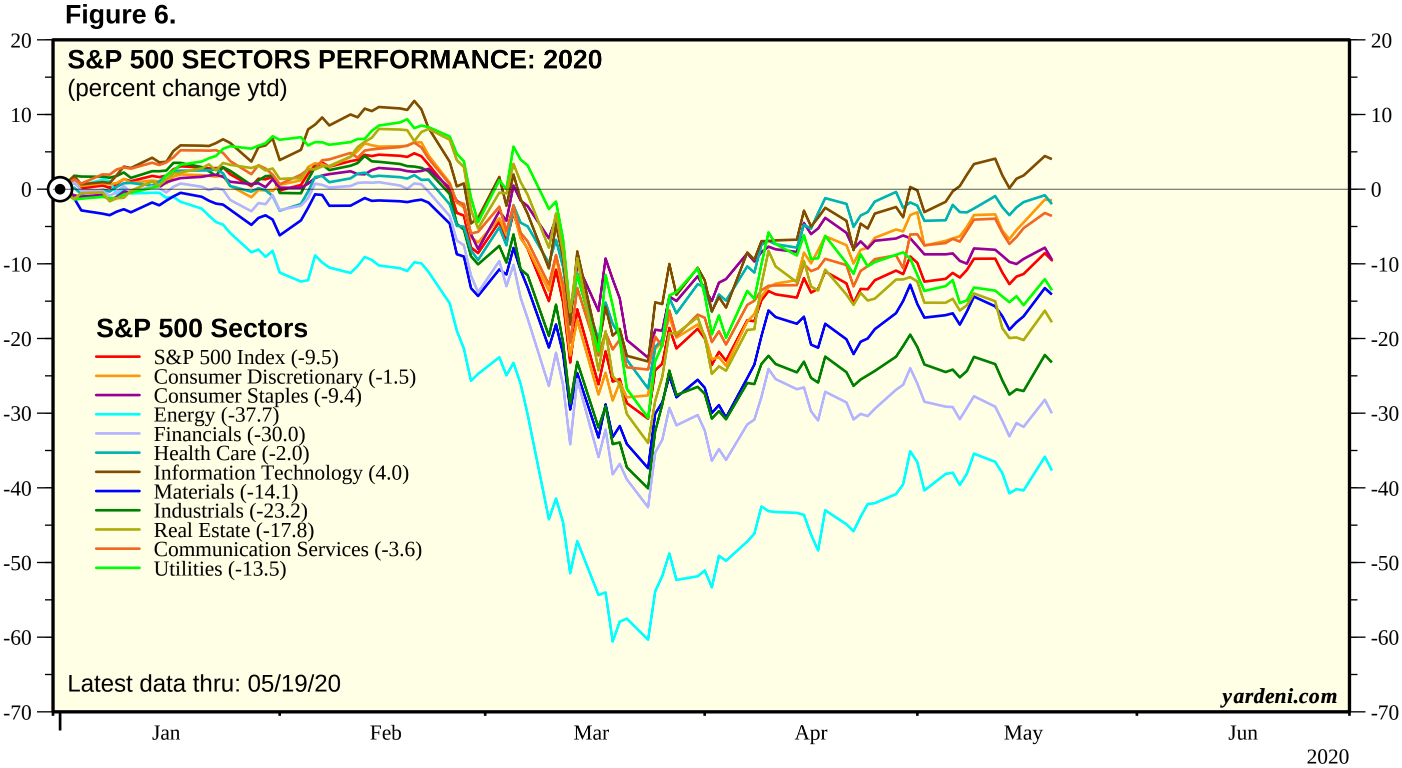
Source: Standard & Poor's.

Figure 5.



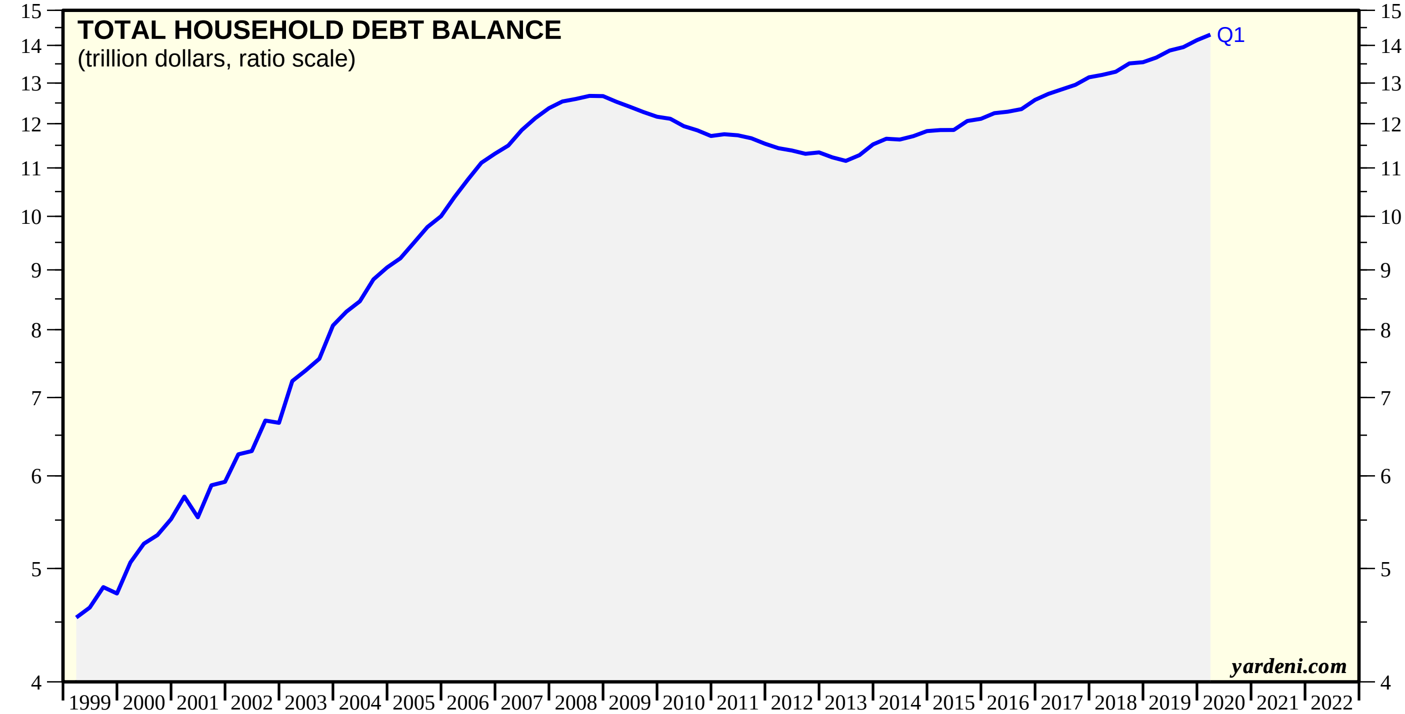
Source: Standard & Poor's.

Figure 6.



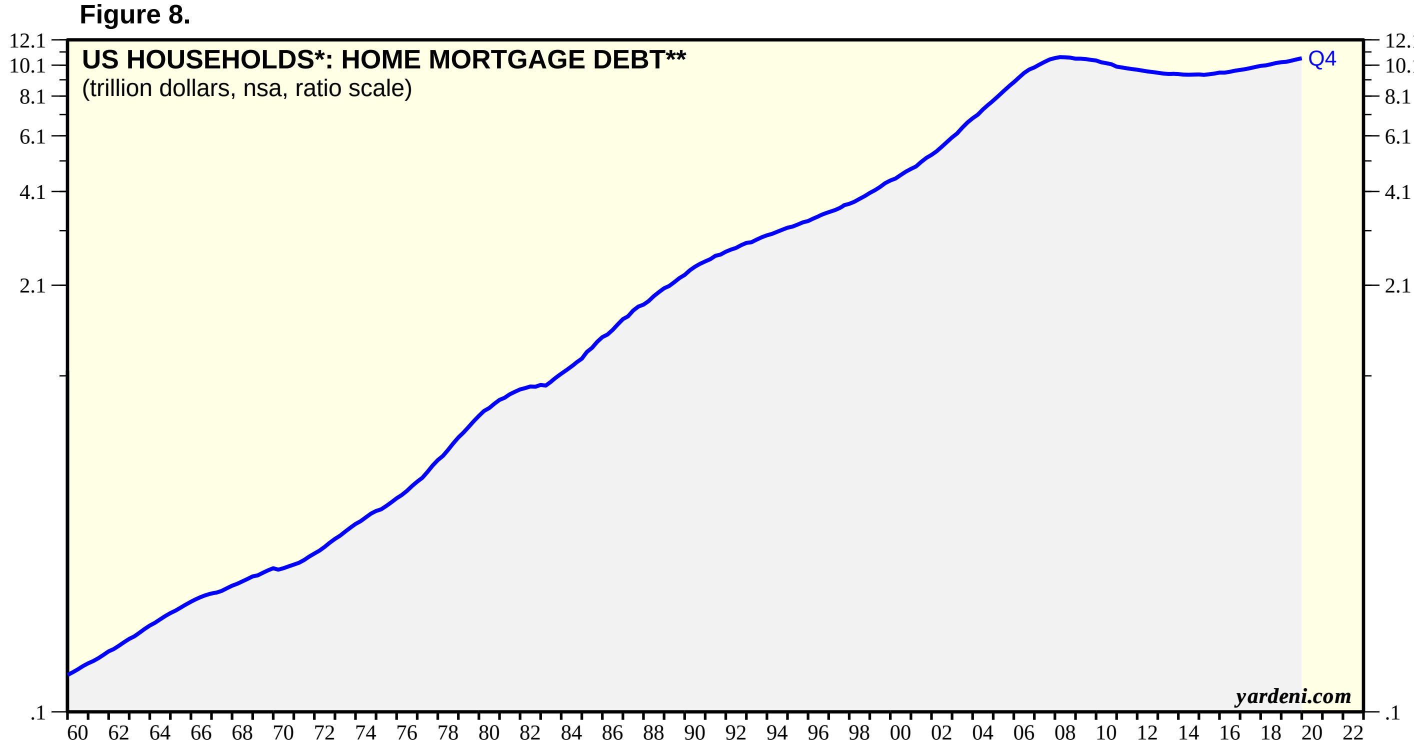
Source: Standard & Poor's.

Figure 7.



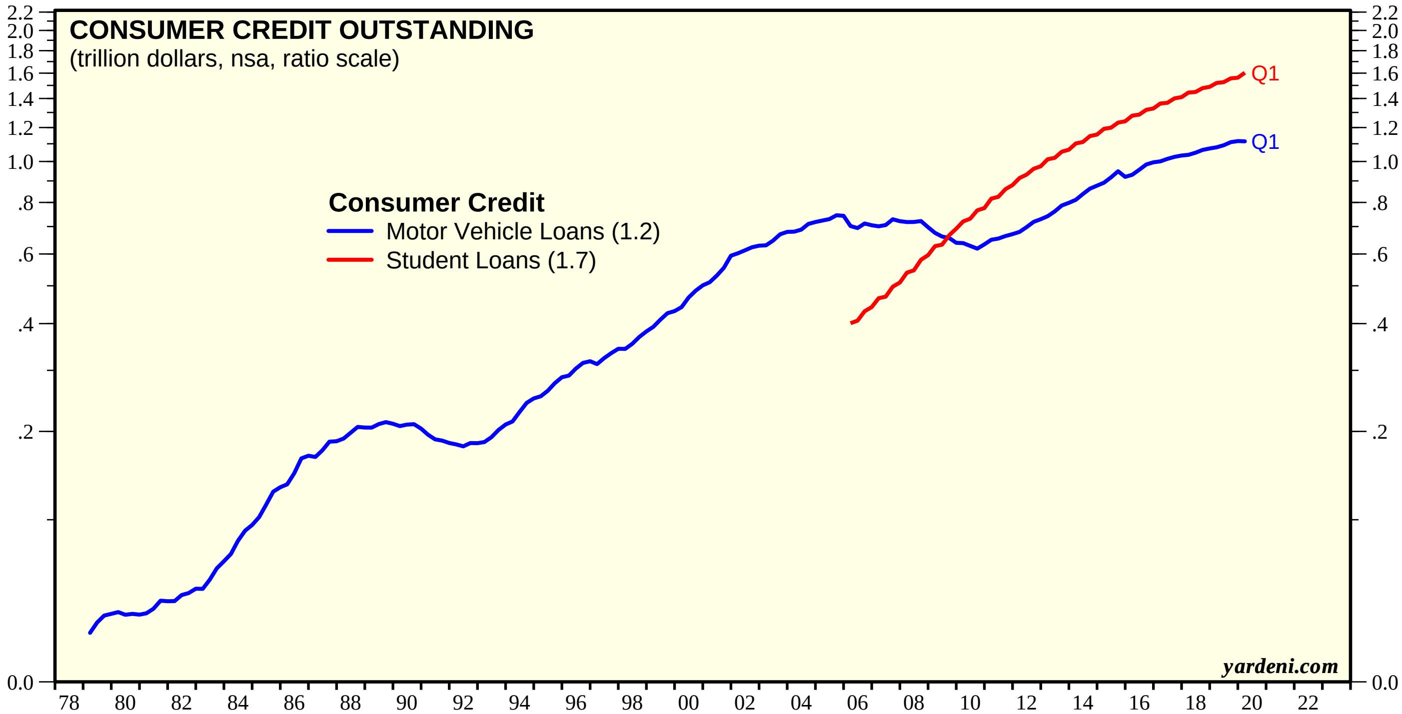
Source: New York Fed Credit Panel.

Figure 8.



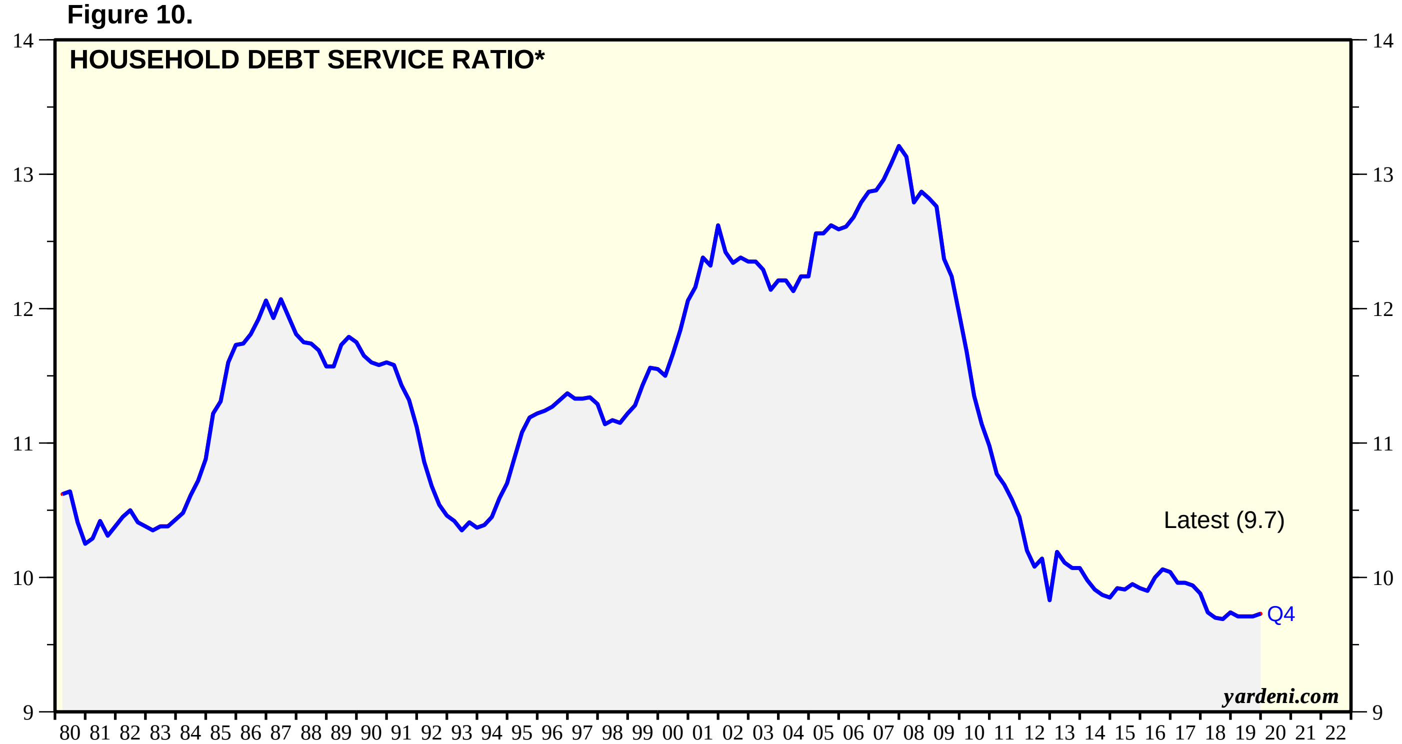
* Sector includes domestic hedge funds, private equity funds, and personal trusts.
** Includes home equity loans and second mortgages.
Source: Federal Reserve Board Financial Accounts of the United States.

Figure 9.



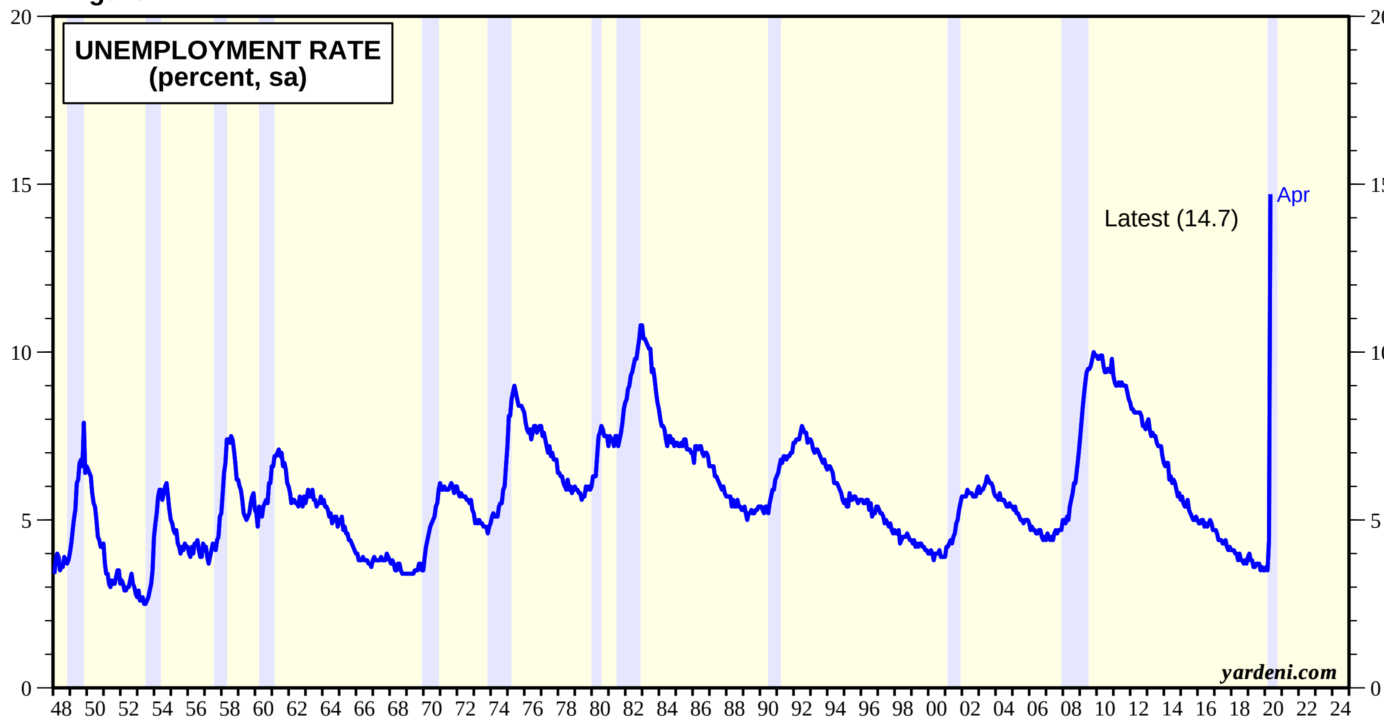
Source: Federal Reserve Board.

Figure 10.



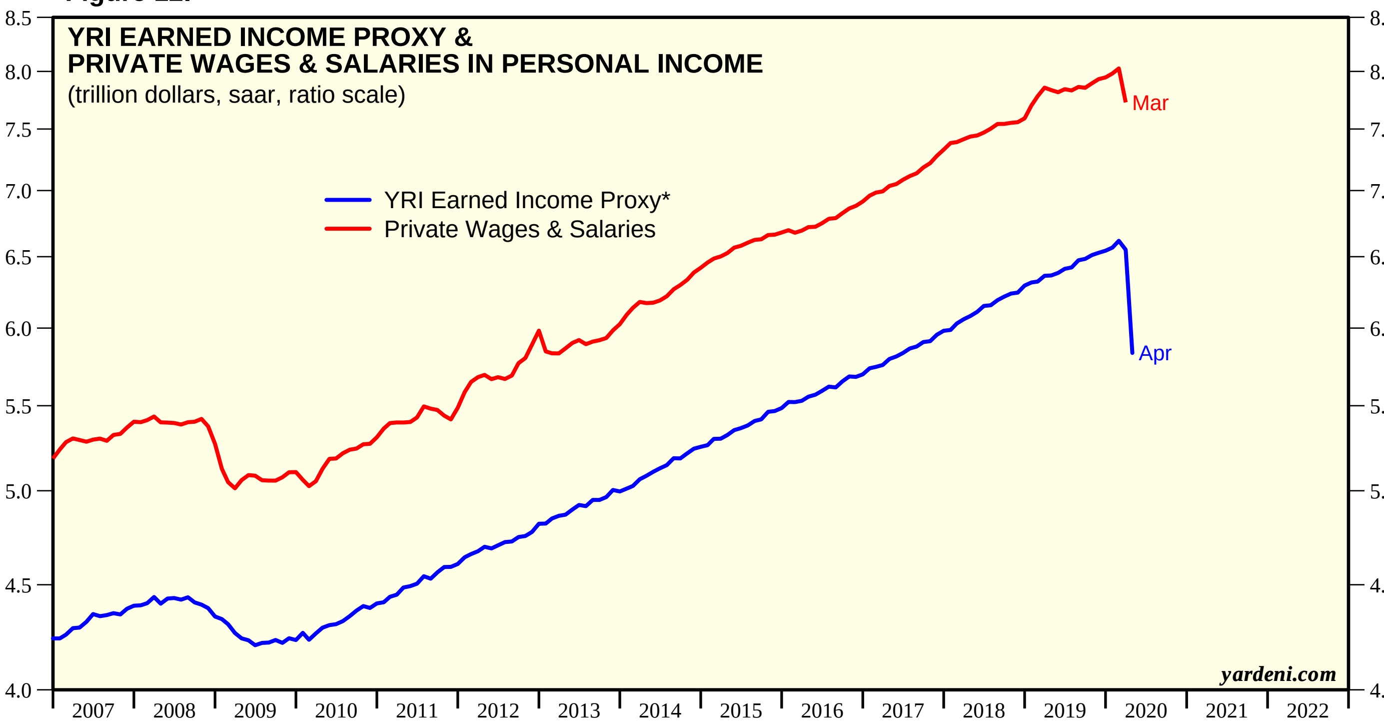
* Ratio of debt service payments to disposable personal income.
Source: Federal Reserve Board.

Figure 11.



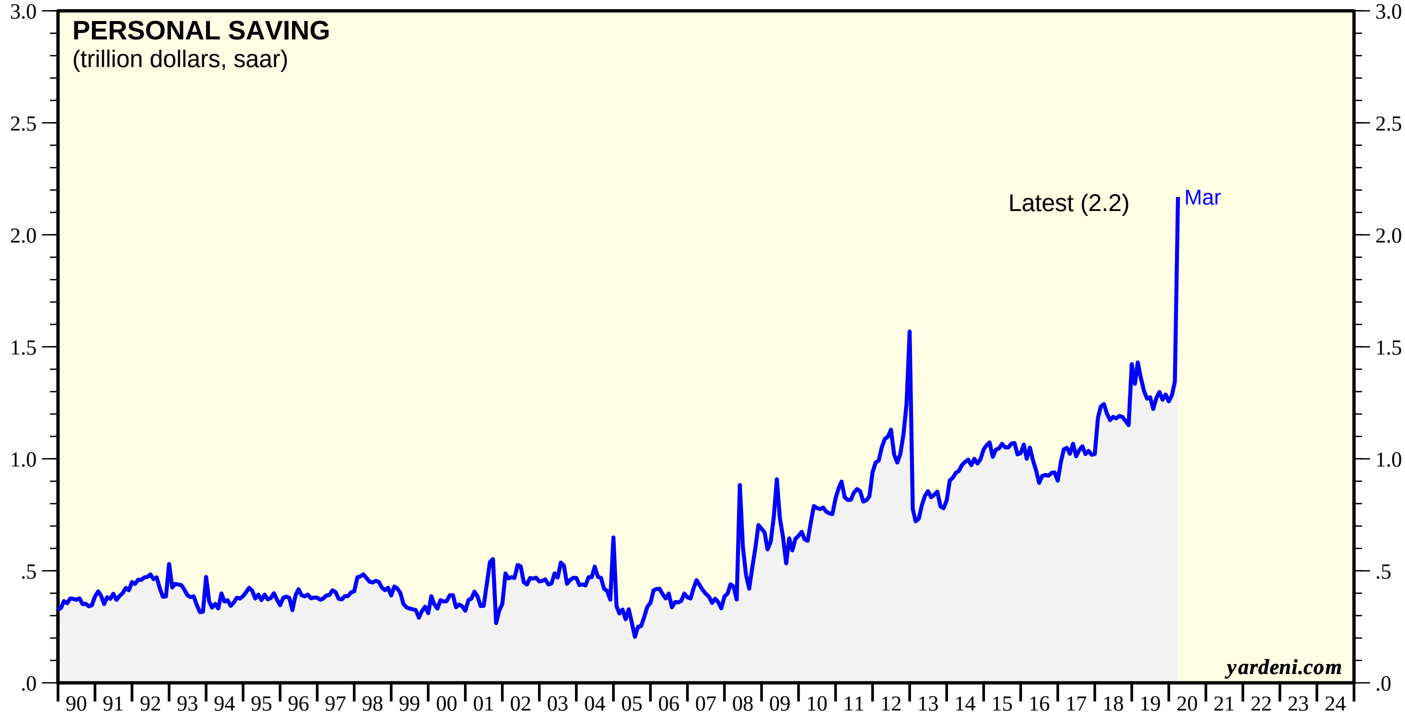
Note: Shaded areas denote recessions according to the National Bureau of Economic Research.
Source: Bureau of Labor Statistics.

Figure 12.



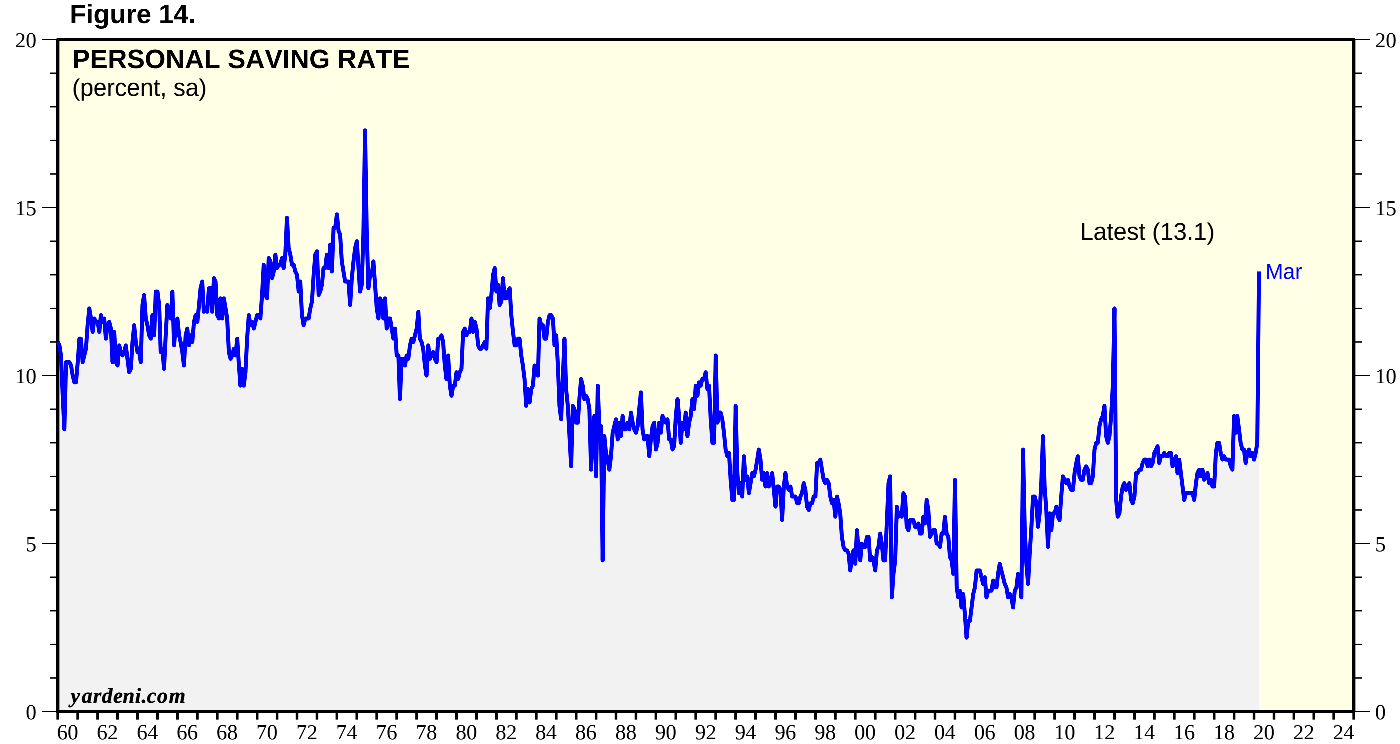
* Aggregate weekly hours times average hourly earnings of total private industries times 52.
Source: Bureau of Labor Statistics and Bureau of Economic Analysis.

Figure 13.



Source: Bureau of Economic Analysis and Haver Analytics.

Figure 14.



Source: Bureau of Economic Analysis and Haver Analytics.