

Chart Collection for Morning Briefing

Yardeni Research, Inc.

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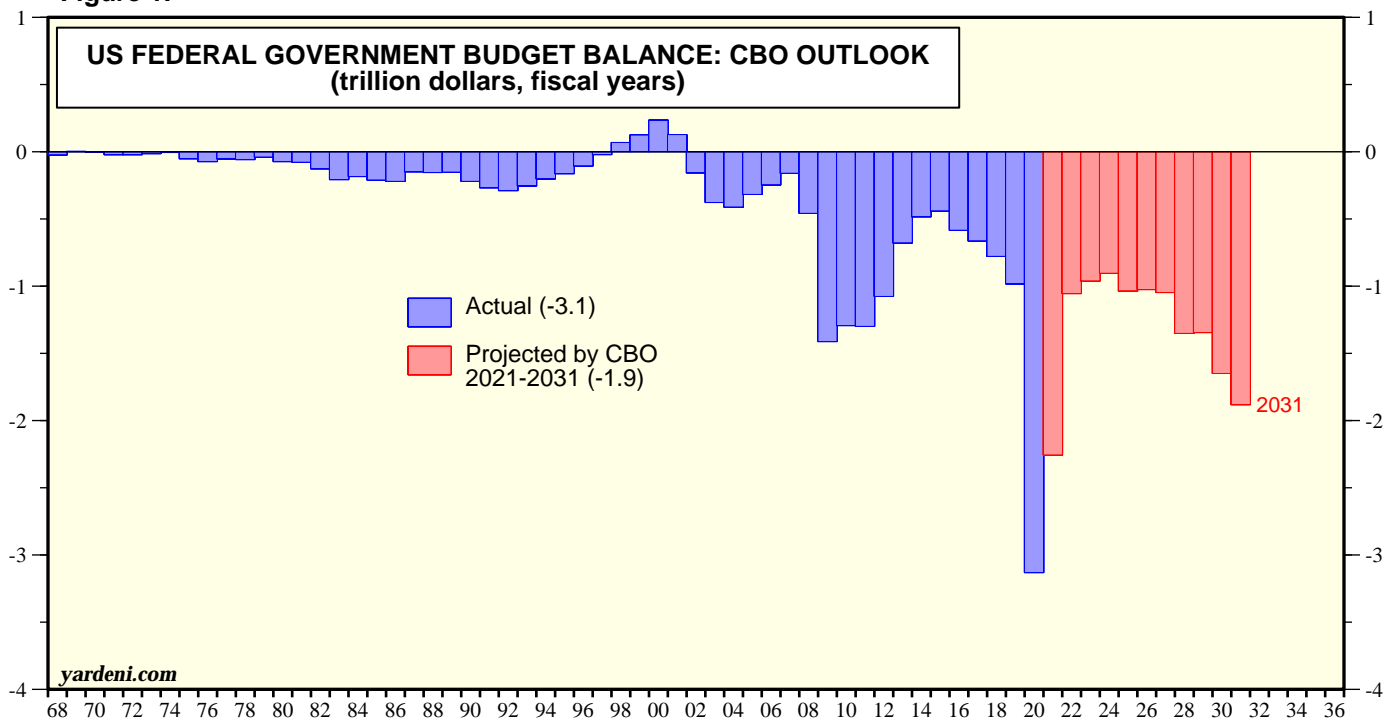
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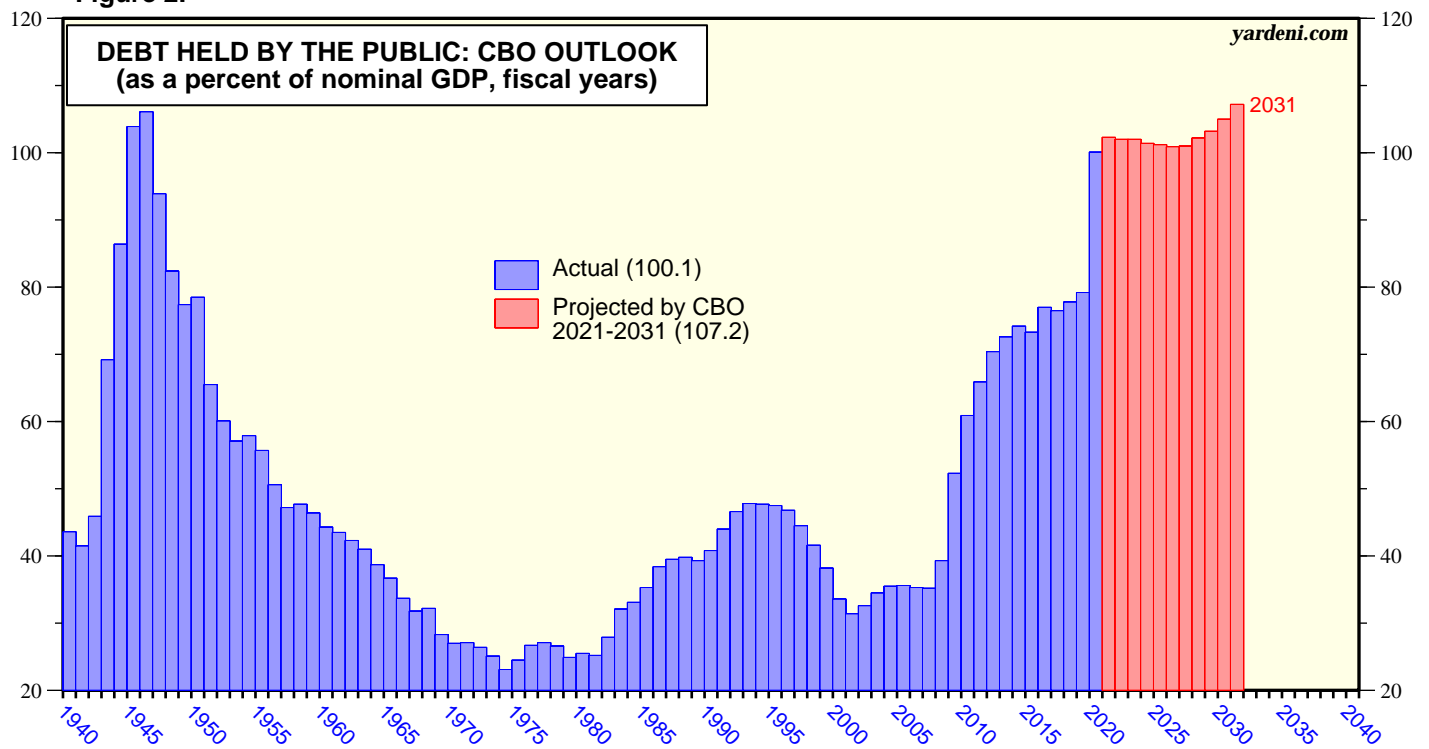
thinking outside the box

Figure 1.



Source: Congressional Budget Office.

Figure 2.



Source: Congressional Budget Office.

Figure 3.

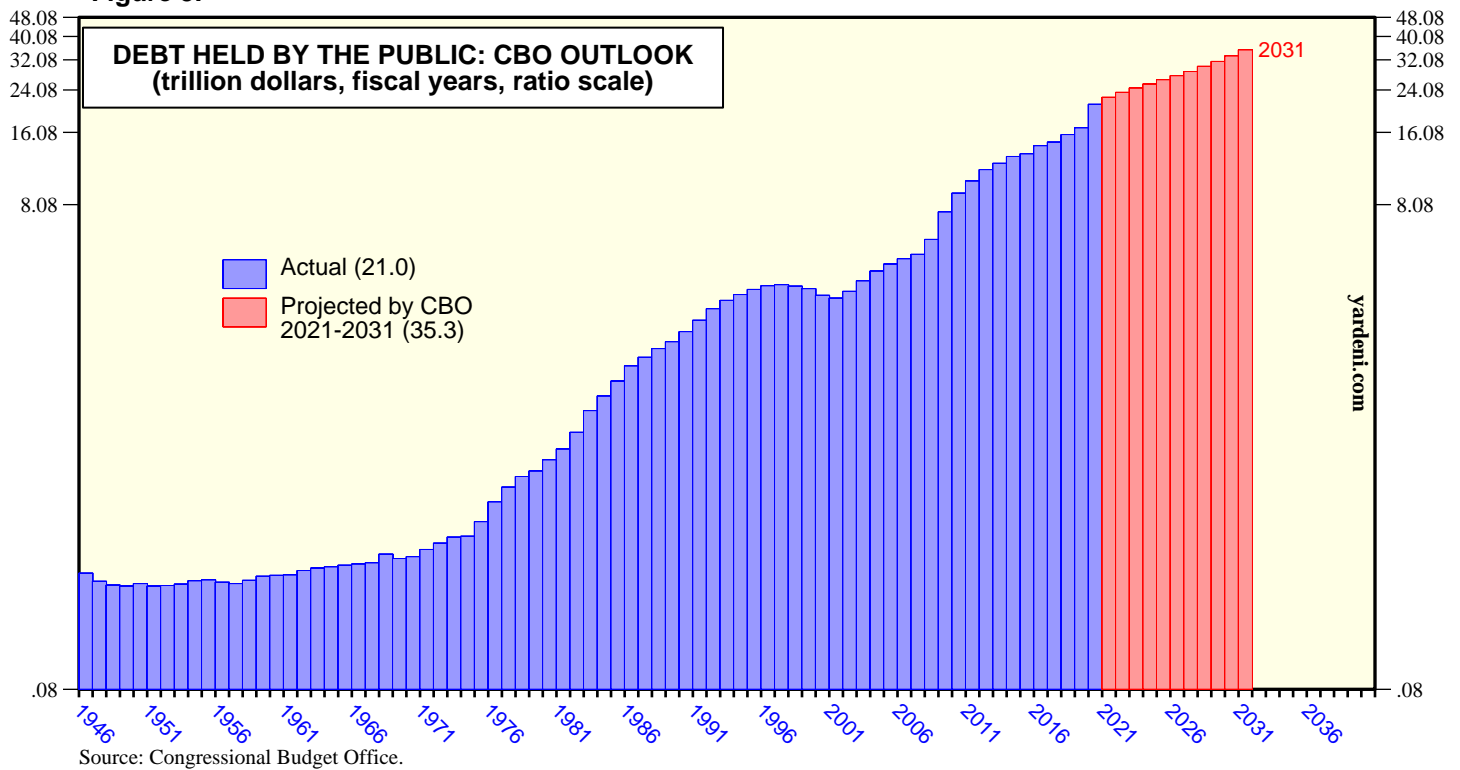


Figure 4.

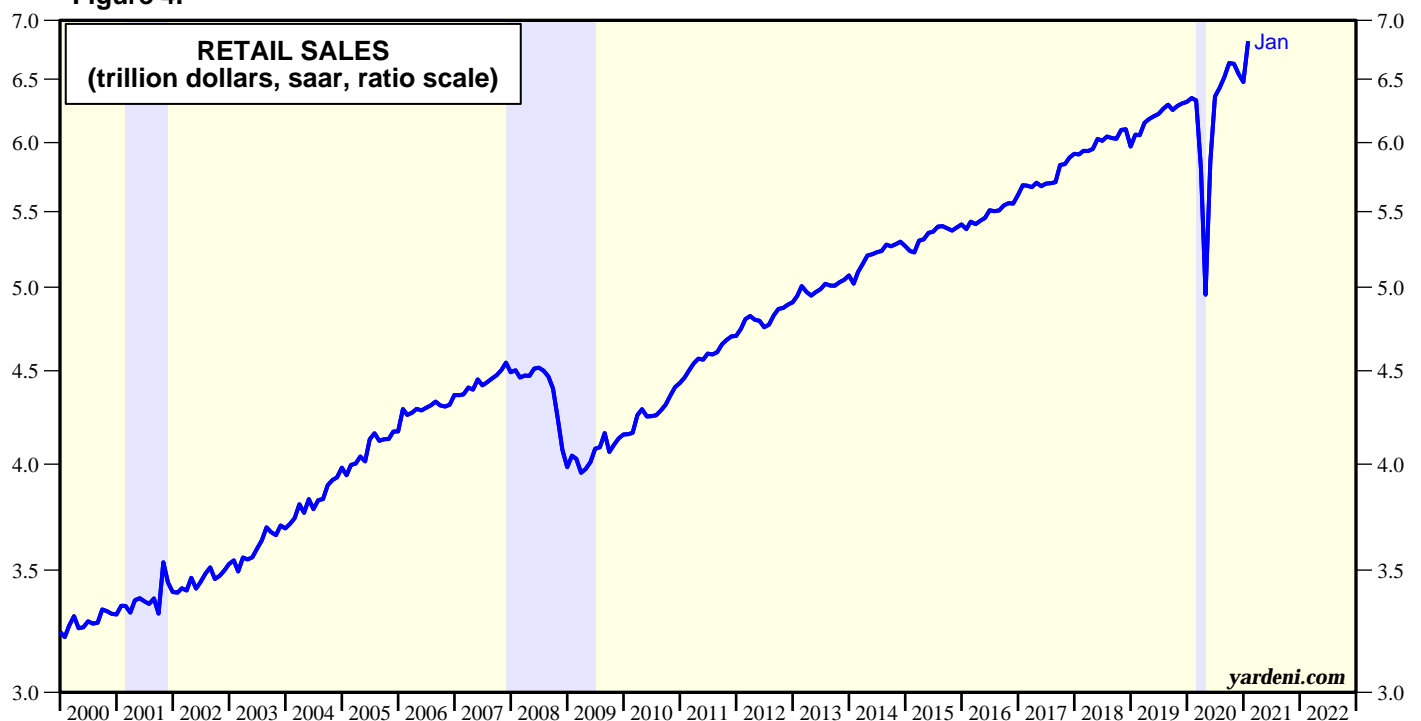
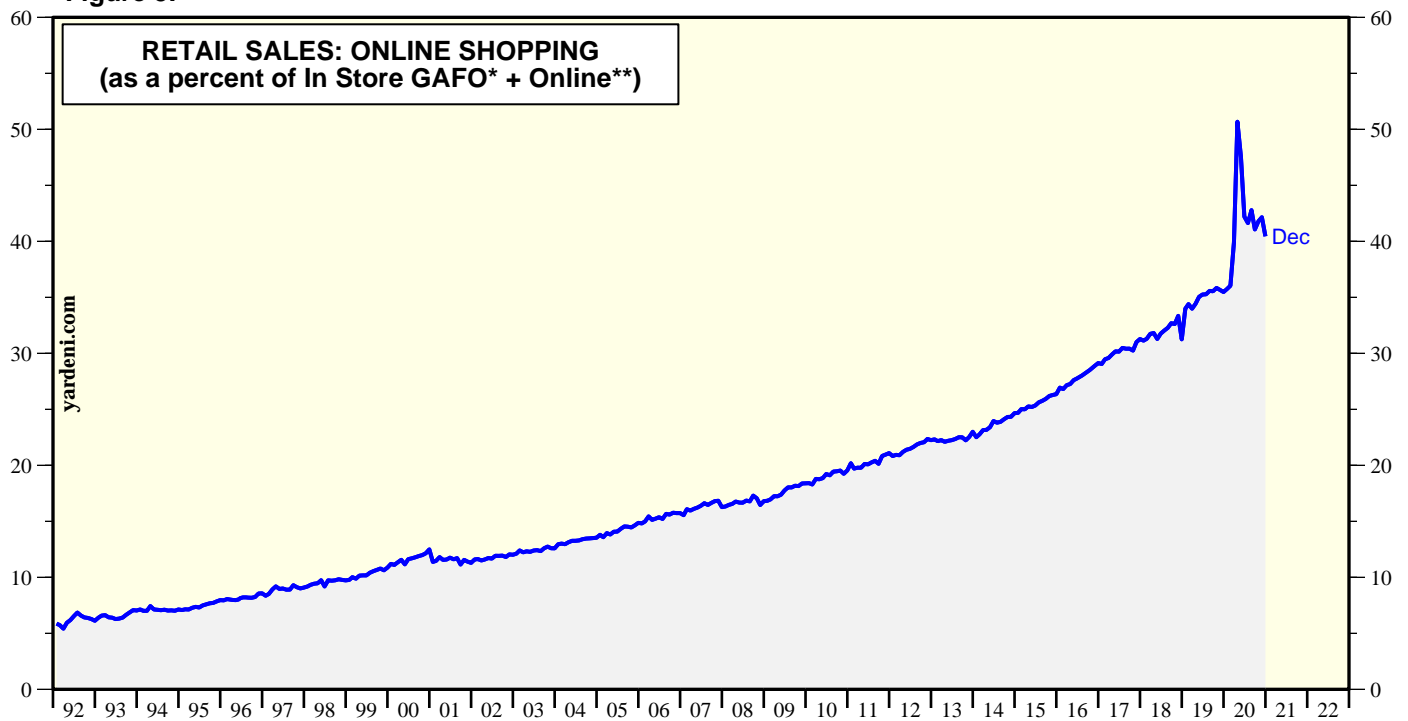


Figure 5.

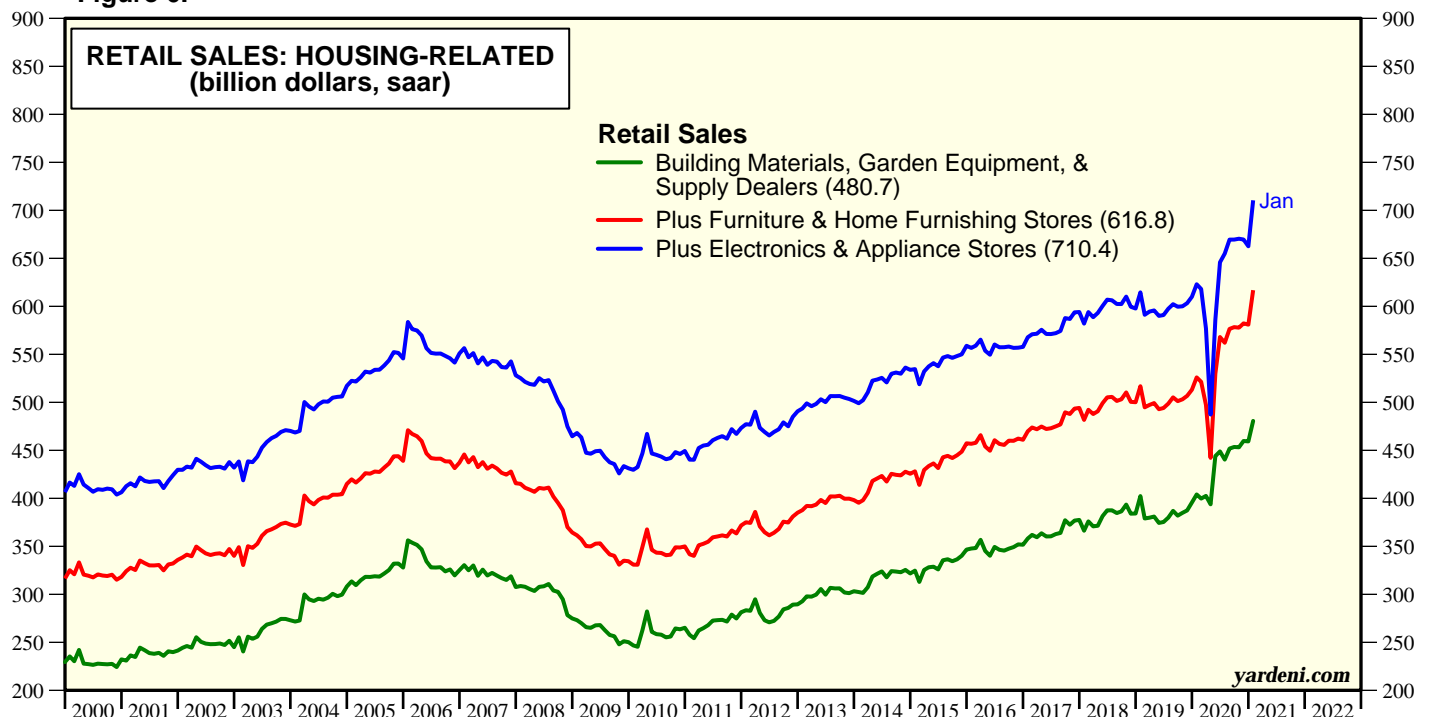


* GAFO (general merchandise, apparel and accessories, furniture, and other sales) includes retailers that specialize in department-store types of merchandise such as furniture & home furnishings, electronics & appliances, clothing & accessories, sporting goods, hobby, book, and music, general merchandise, office supply, stationery, and gift stores.

** Electronic shopping and mail order houses.

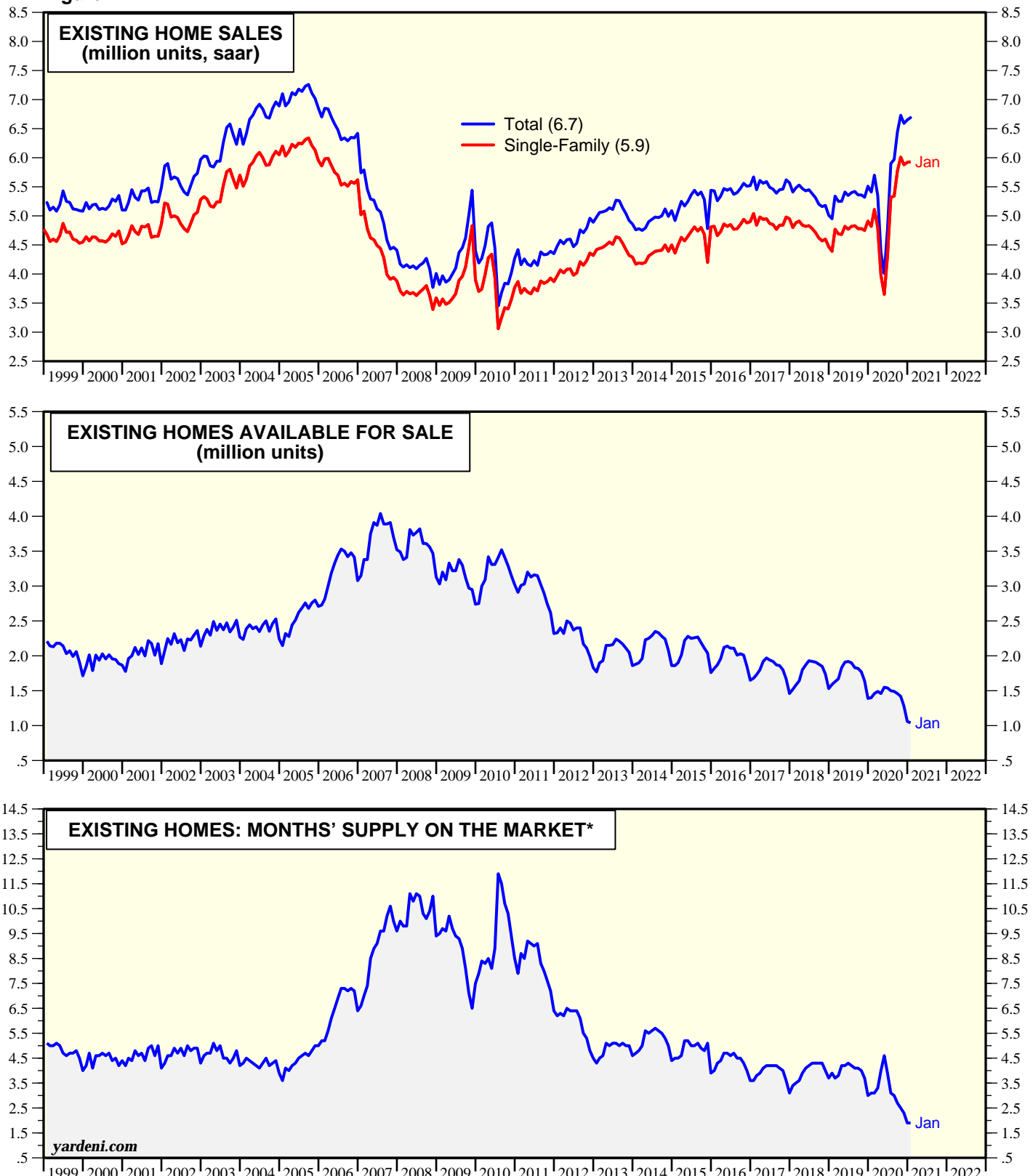
Source: Census Bureau and Haver Analytics.

Figure 6.



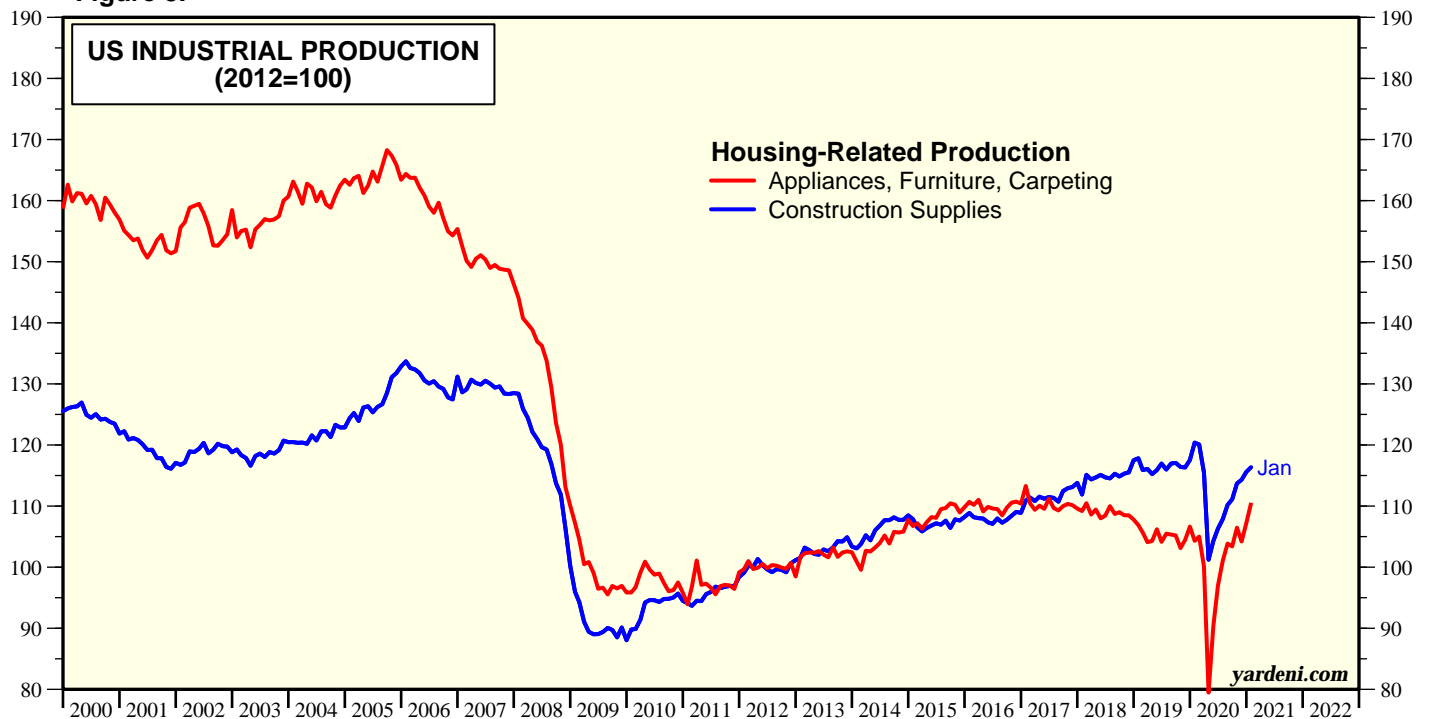
Source: Census Bureau.

Figure 7.



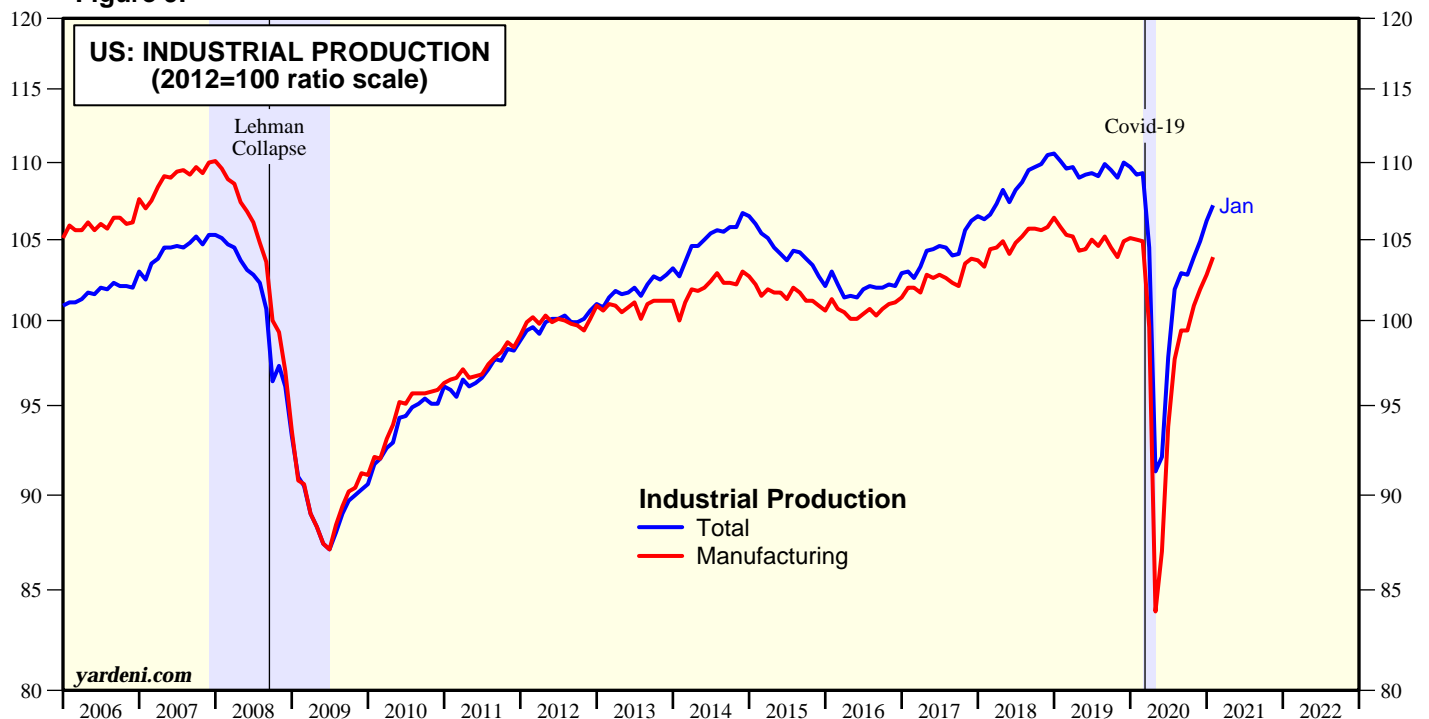
* Ratio of existing homes for sale to existing homes sold.
Source: National Association of Realtors.

Figure 8.



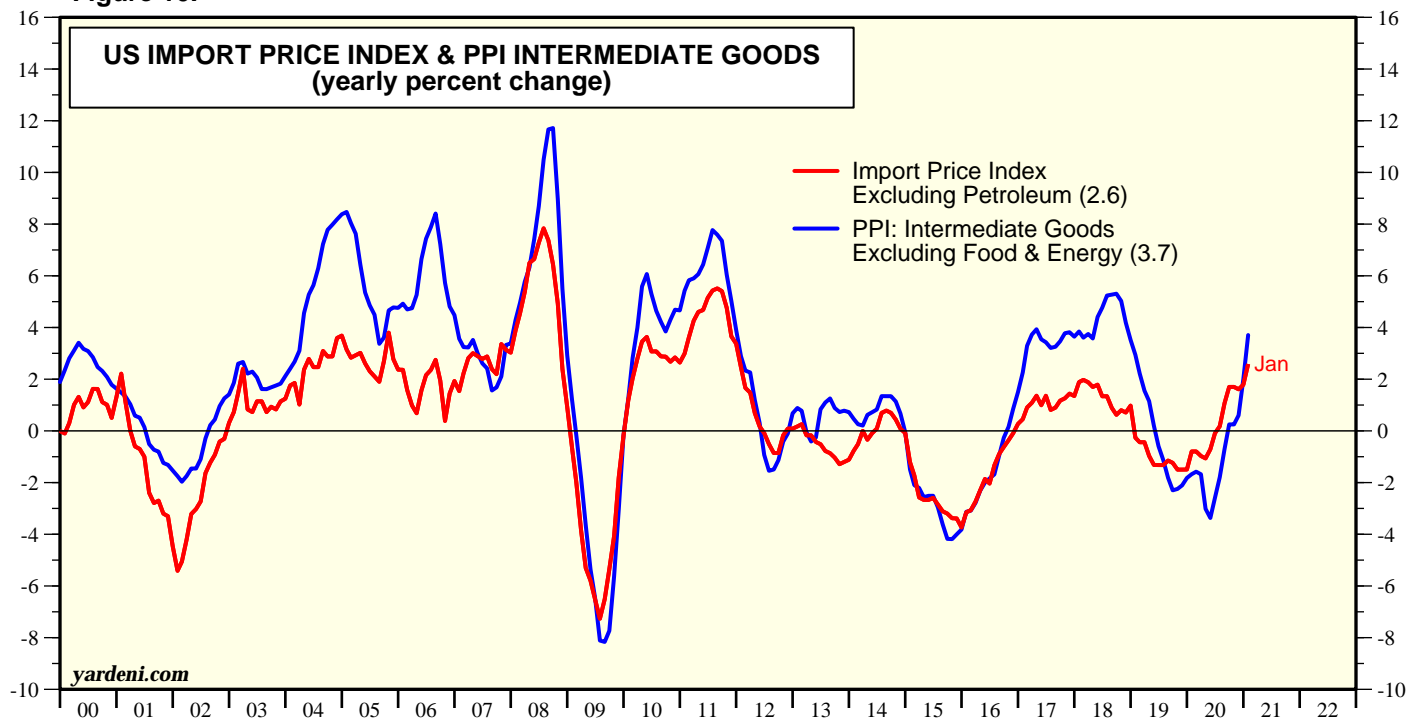
Source: Federal Reserve Board.

Figure 9.



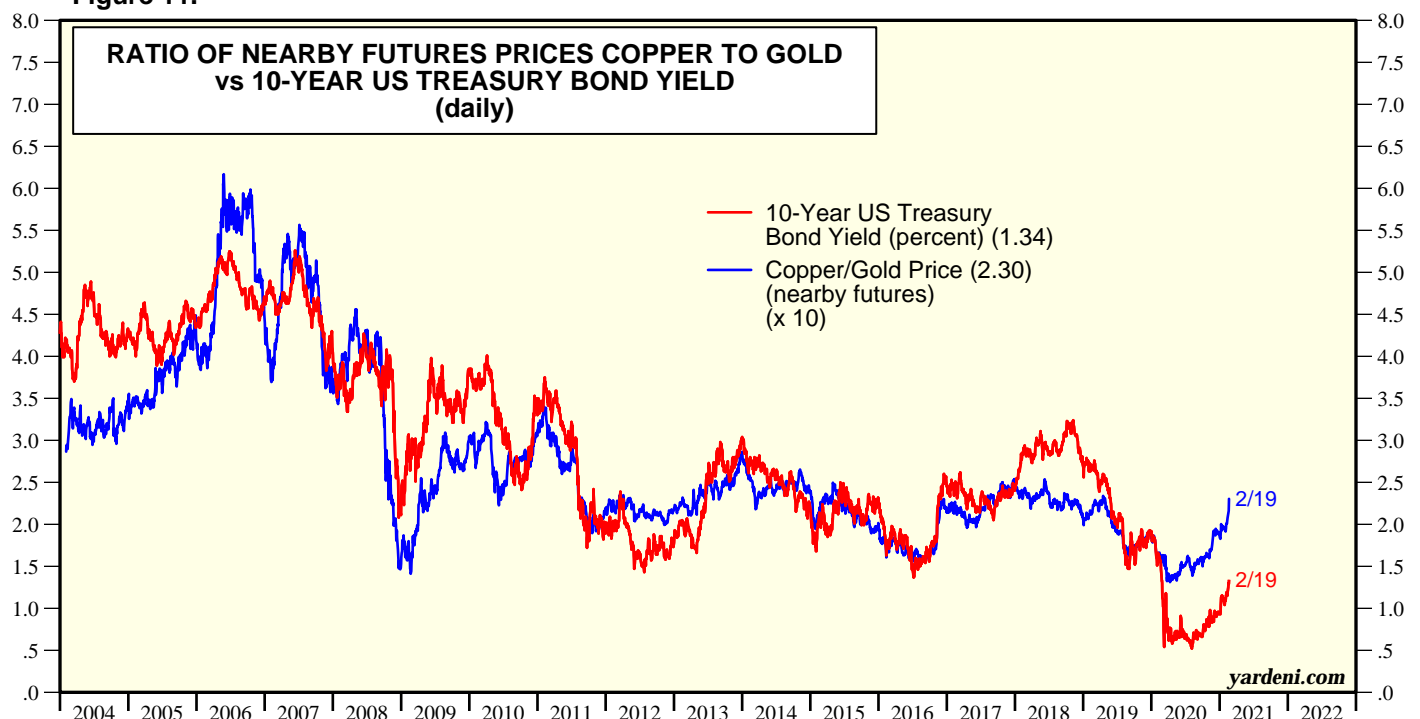
Note: Lehman collapsed 9/15/2008. WHO declared global Covid-19 pandemic on 3/11/2020. Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Federal Reserve Board.

Figure 10.



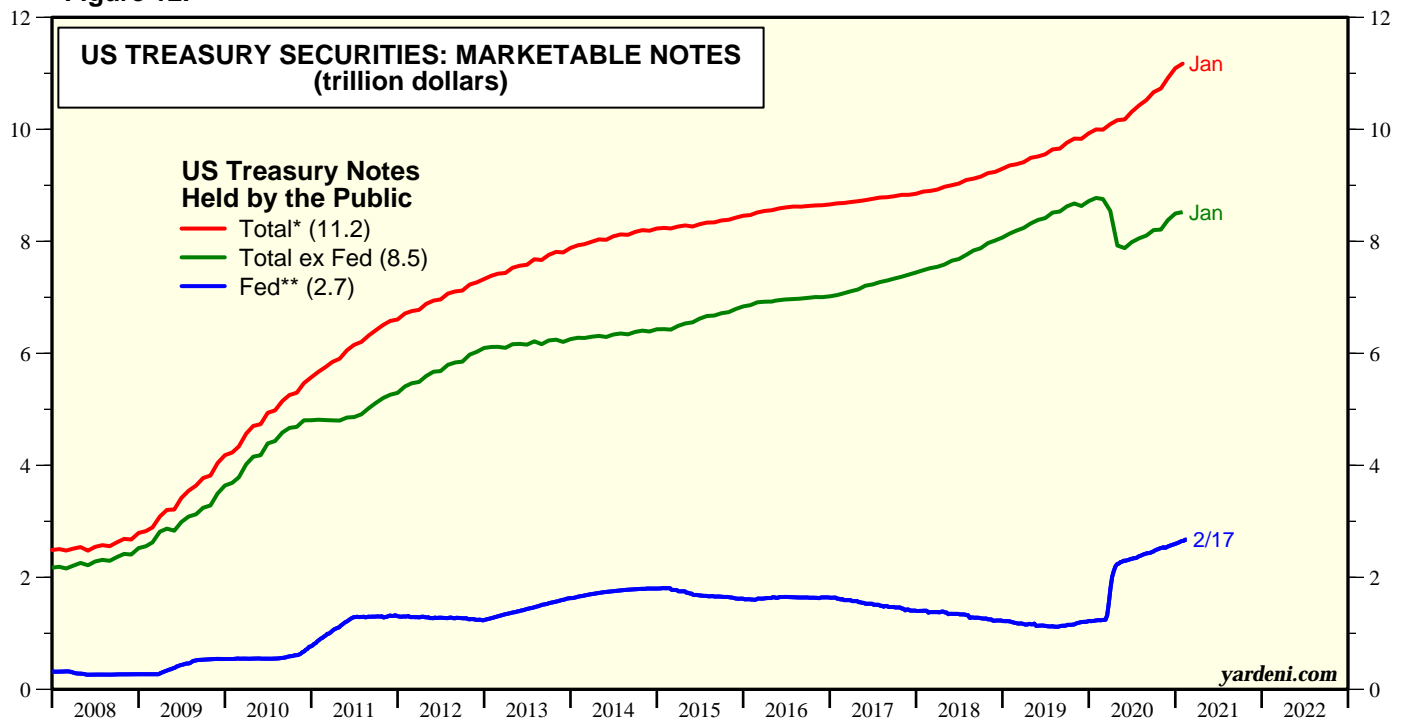
Source: Haver Analytics.

Figure 11.



Source: Federal Reserve Board and Haver Analytics.

Figure 12.

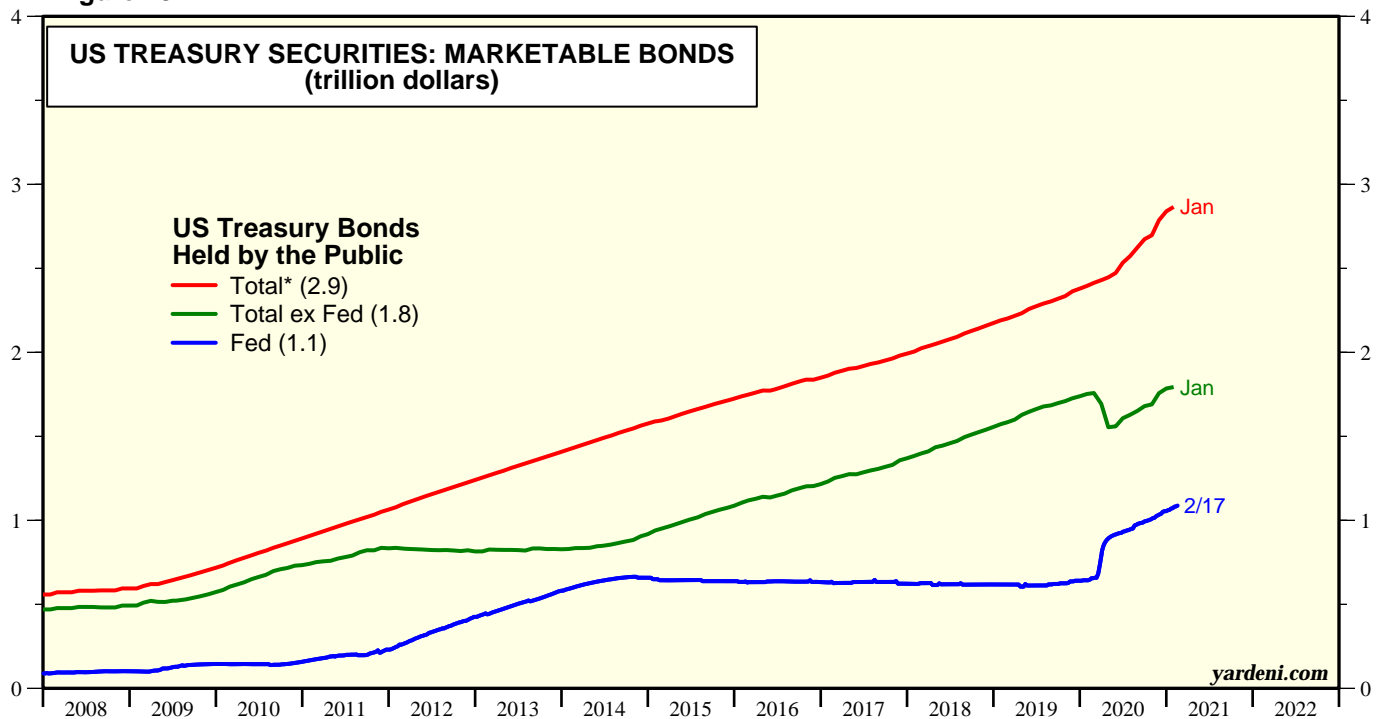


* Including held by the Fed.

** 1-10 years maturities.

Source: Federal Reserve Board and US Treasury.

Figure 13.



* Including held by the Fed.

Source: Federal Reserve Board and US Treasury.

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