

Chart Collection for Morning Briefing

Yardeni Research, Inc.

July 22, 2021

Dr. Edward Yardeni

516-972-7683
eyardeni@yardeni.com

Mali Quintana

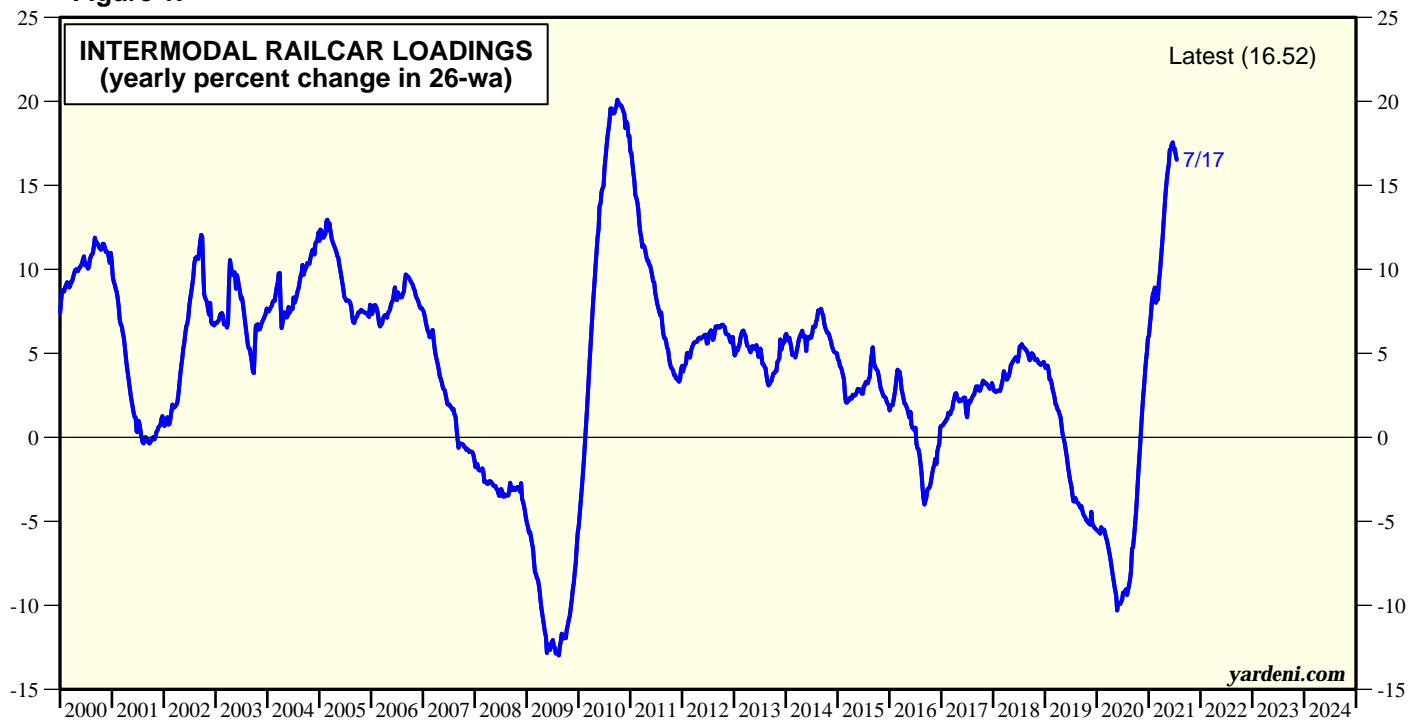
480-664-1333
aquintana@yardeni.com

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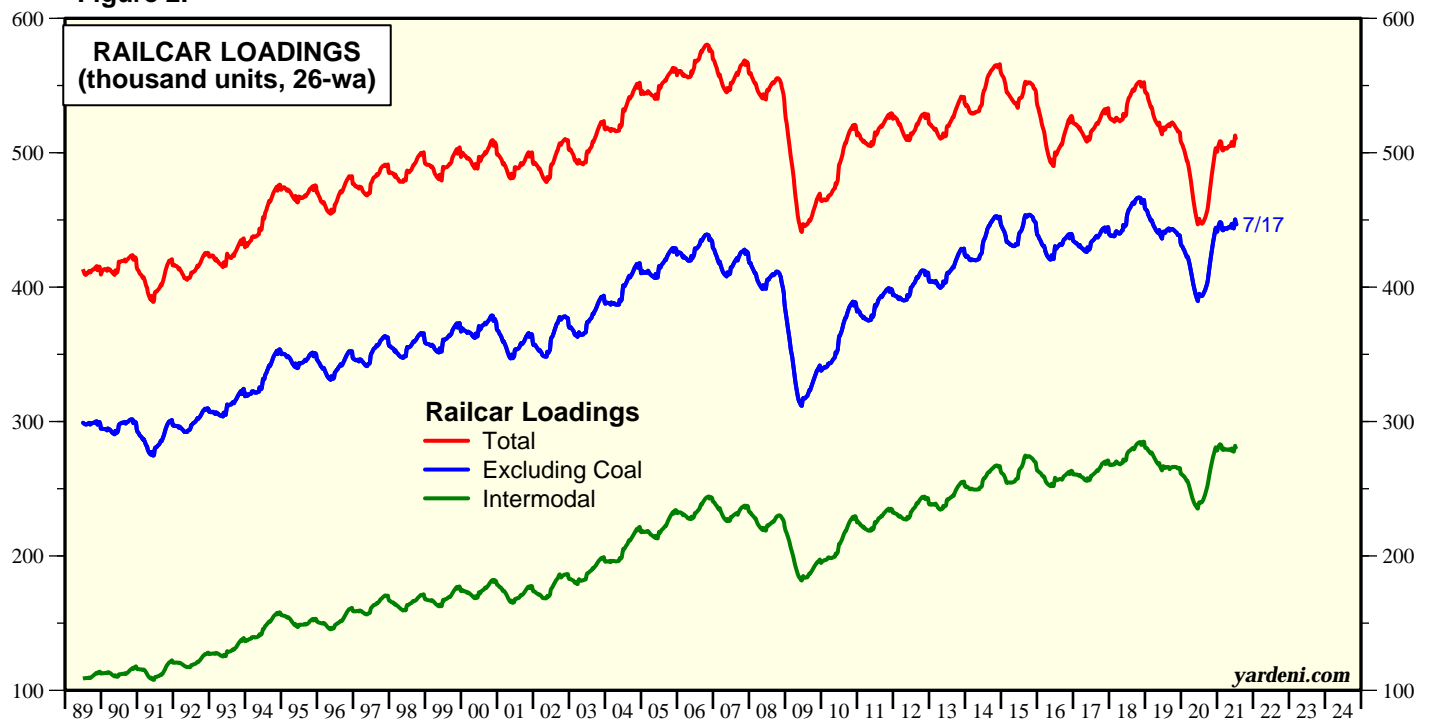
thinking outside the box

Figure 1.



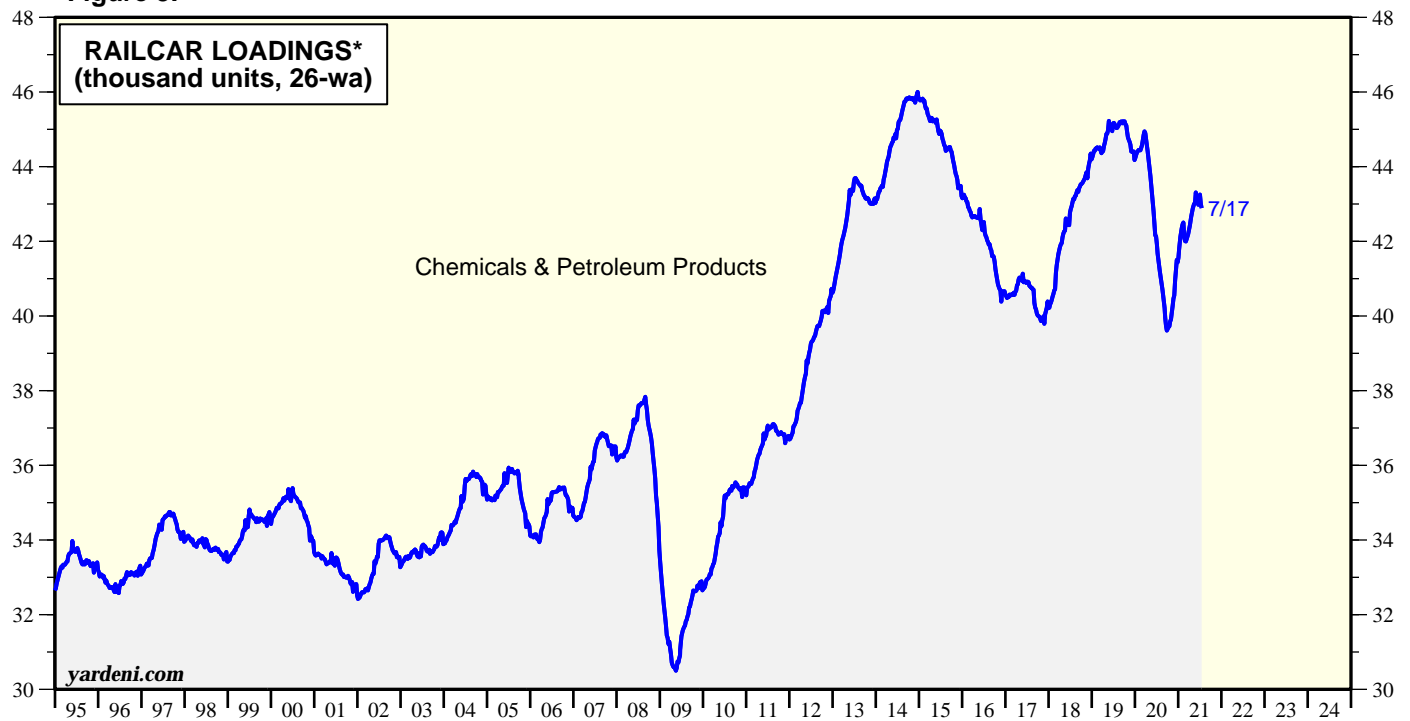
Source: Atlantic Systems.

Figure 2.



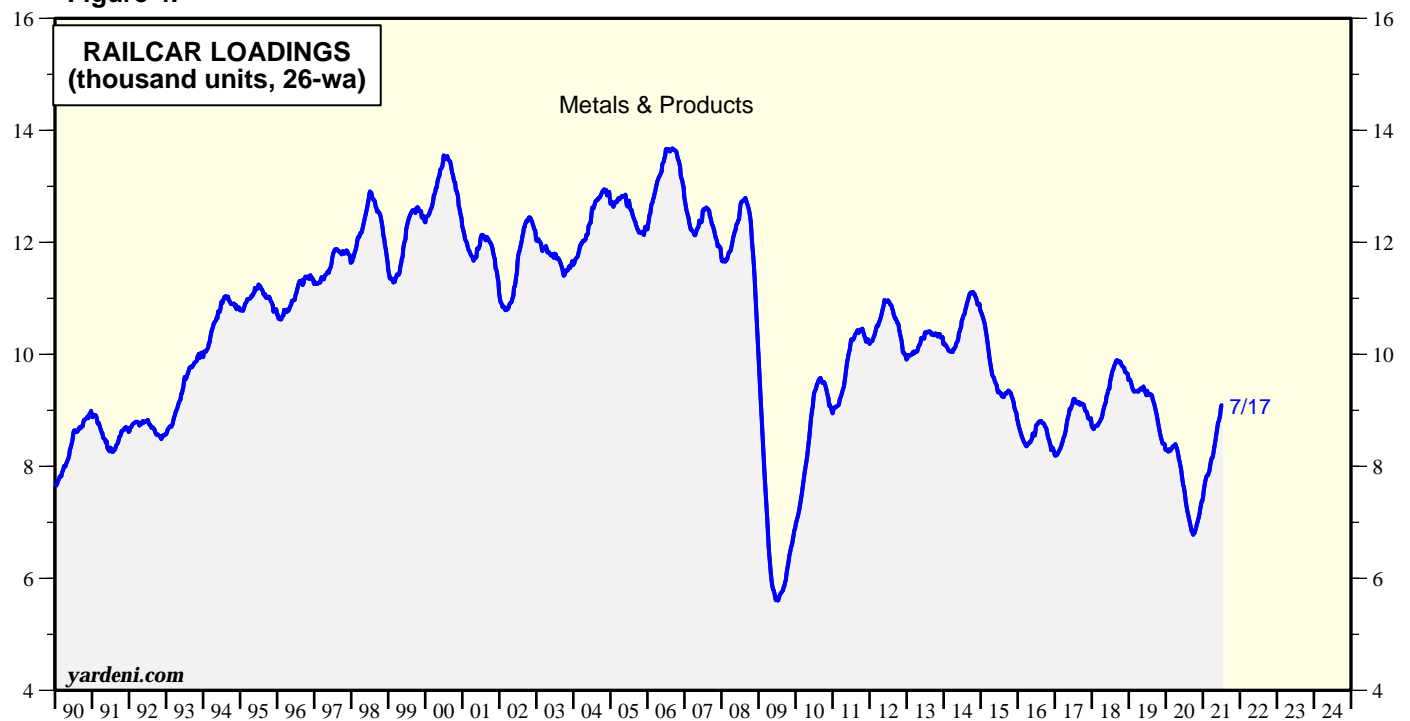
Source: Atlantic Systems.

Figure 3.



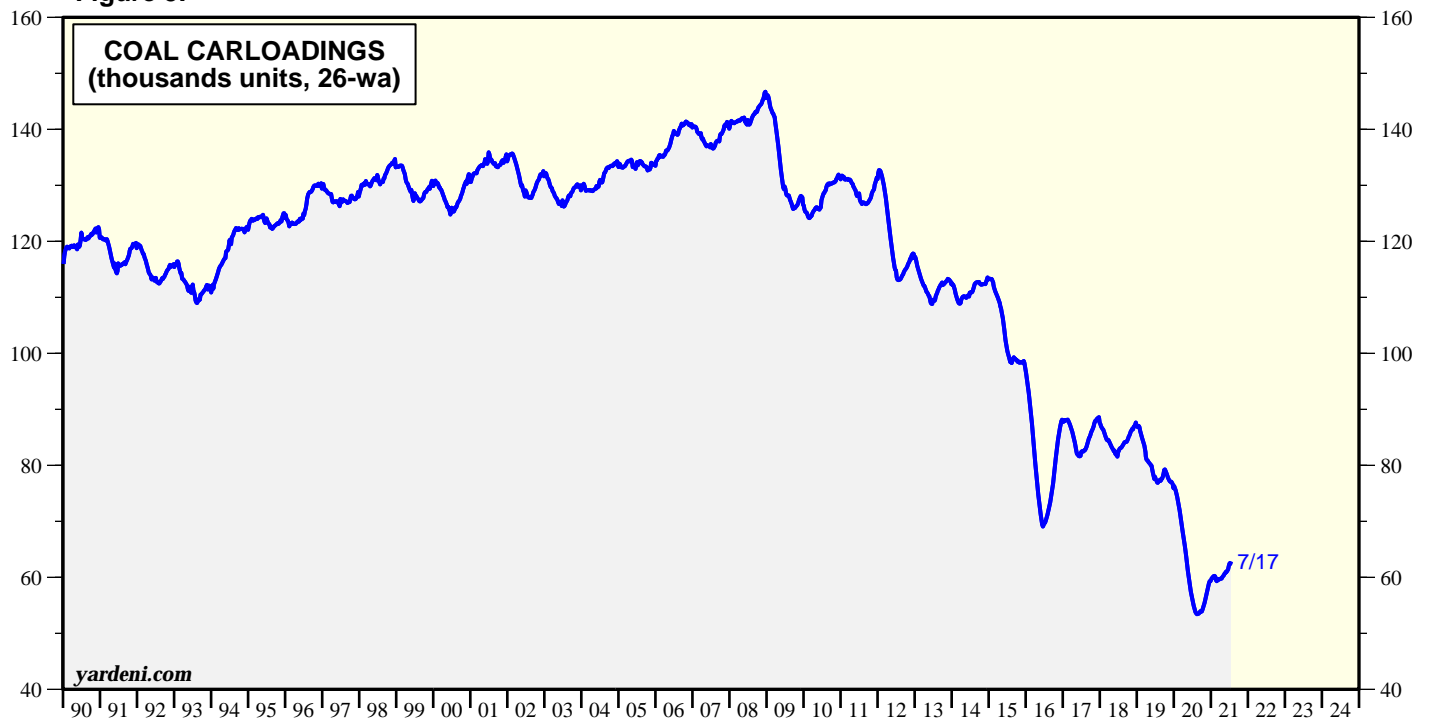
Source: Atlantic Systems.

Figure 4.



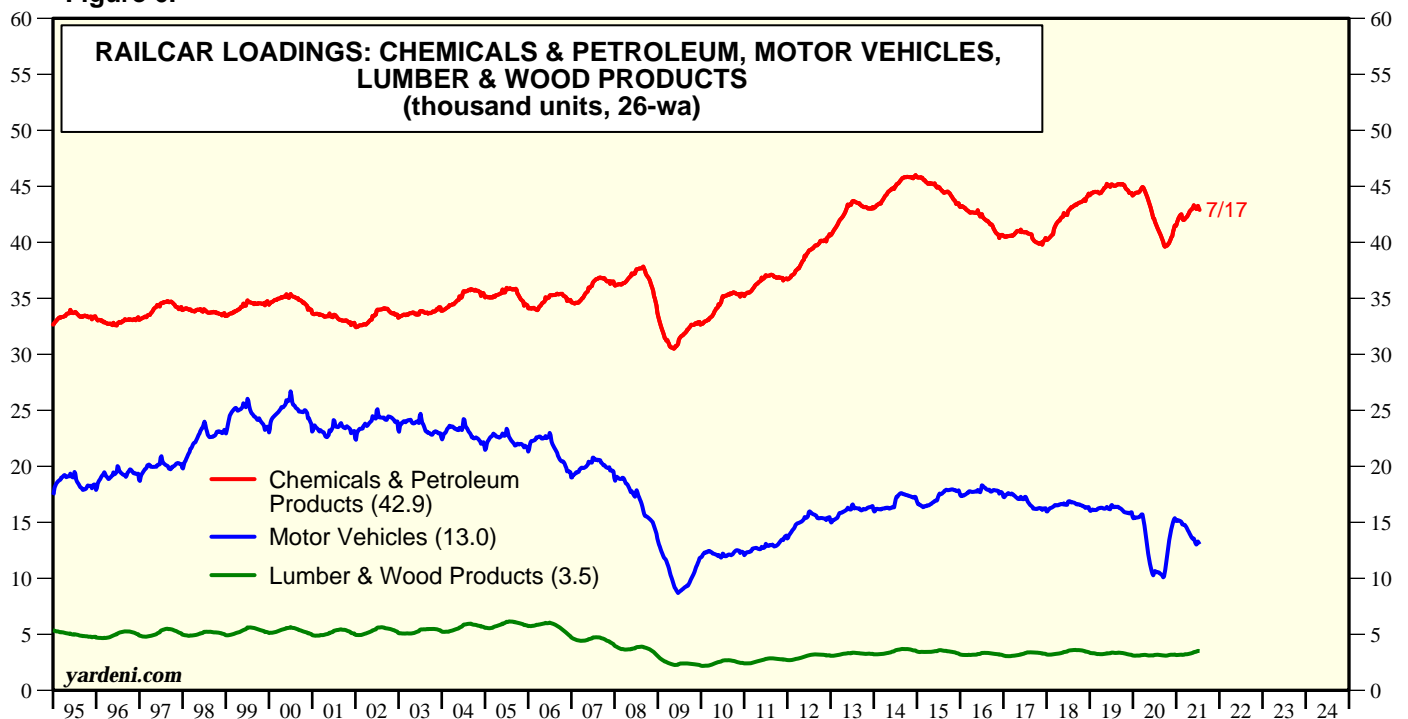
Source: Atlantic Systems.

Figure 5.



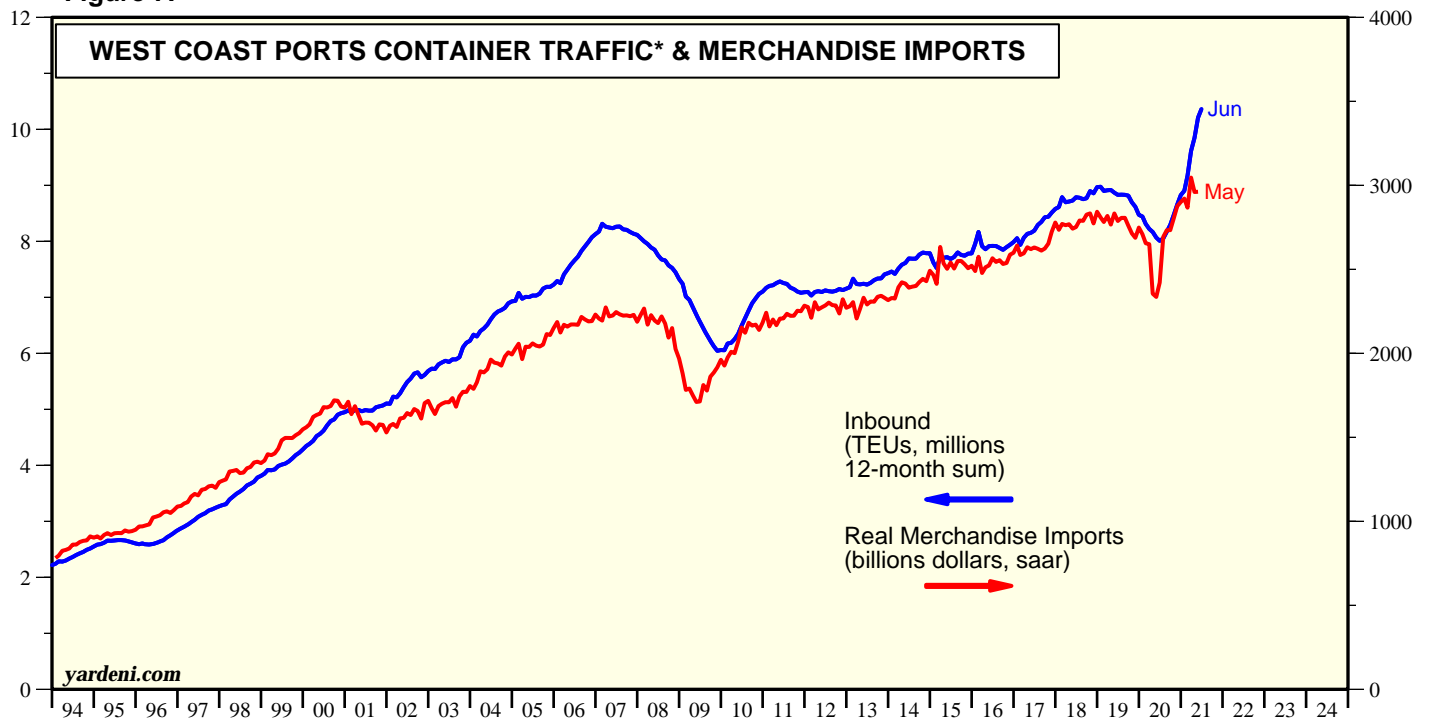
Source: Atlantic Systems.

Figure 6.



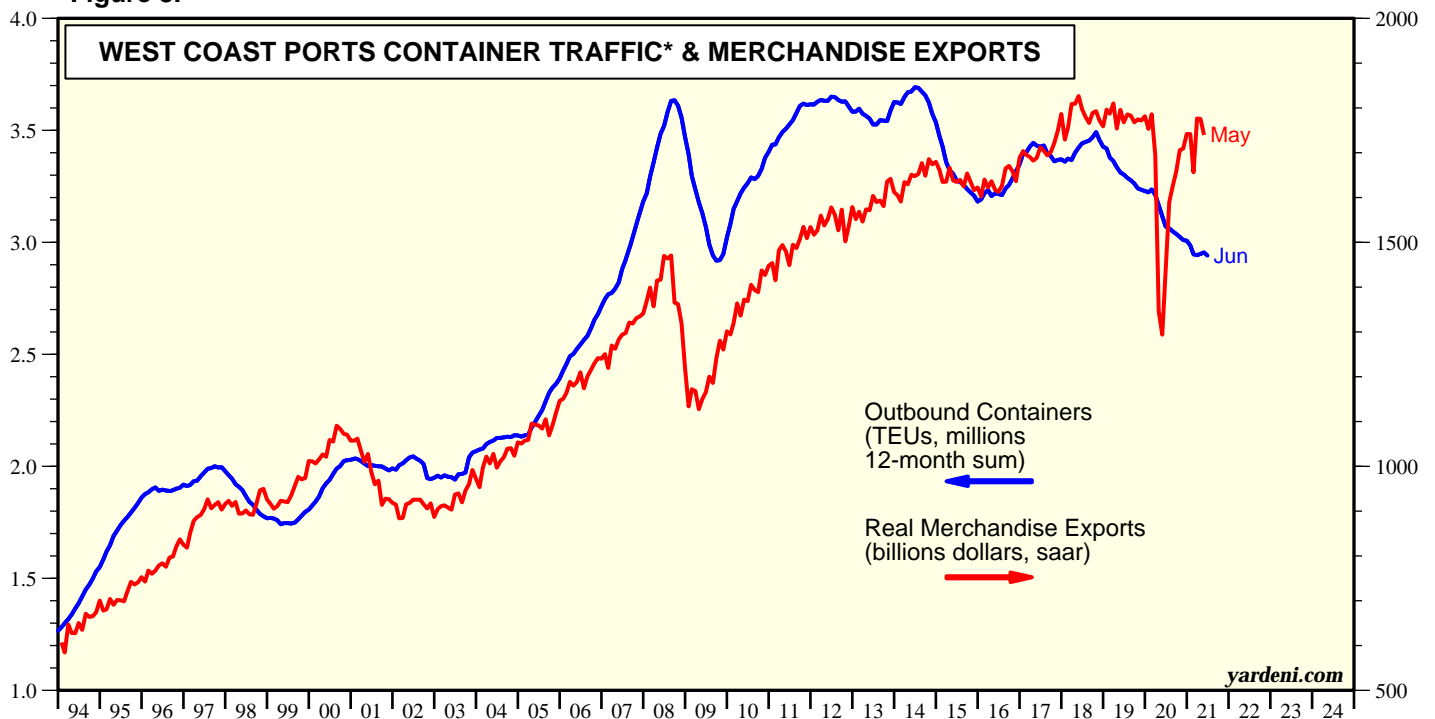
Source: Atlantic Systems.

Figure 7.



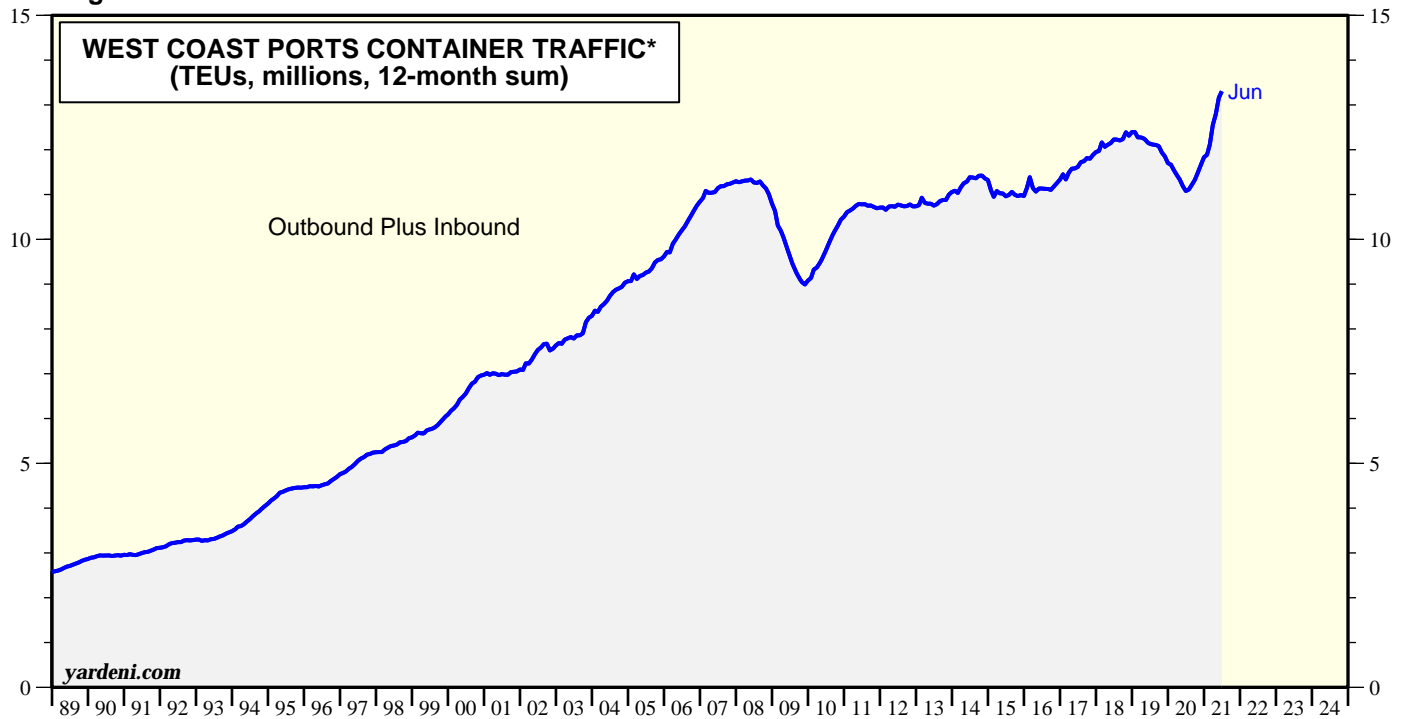
* Sum of Port of Los Angeles and Port of Long Beach Loaded Containers. TEUs=20-foot equivalent units.
Source: Ports of Los Angeles and Long Beach and Bureau of Economic Analysis.

Figure 8.



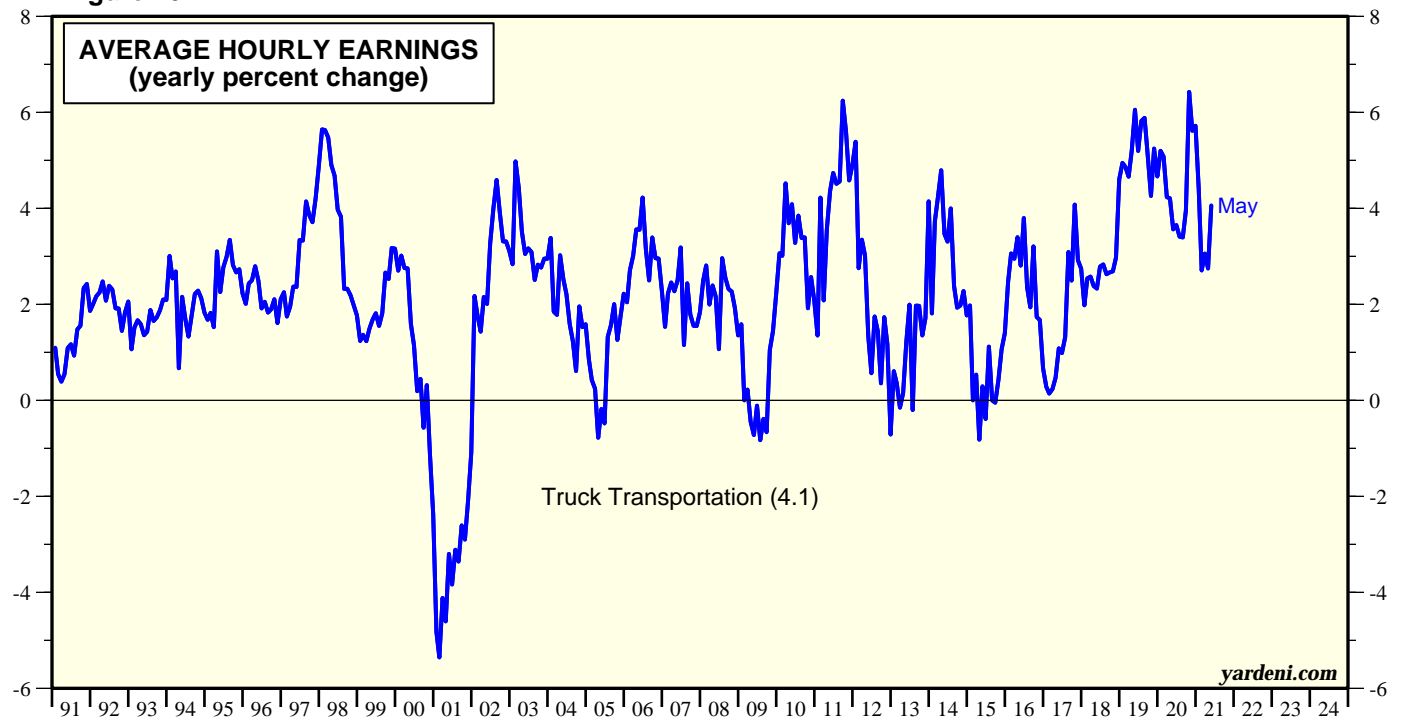
* Sum of Port of Los Angeles and Port of Long Beach Loaded Containers. TEUs=20-foot equivalent units.
Source: Ports of Los Angeles and Long Beach and Bureau of Economic Analysis.

Figure 9.



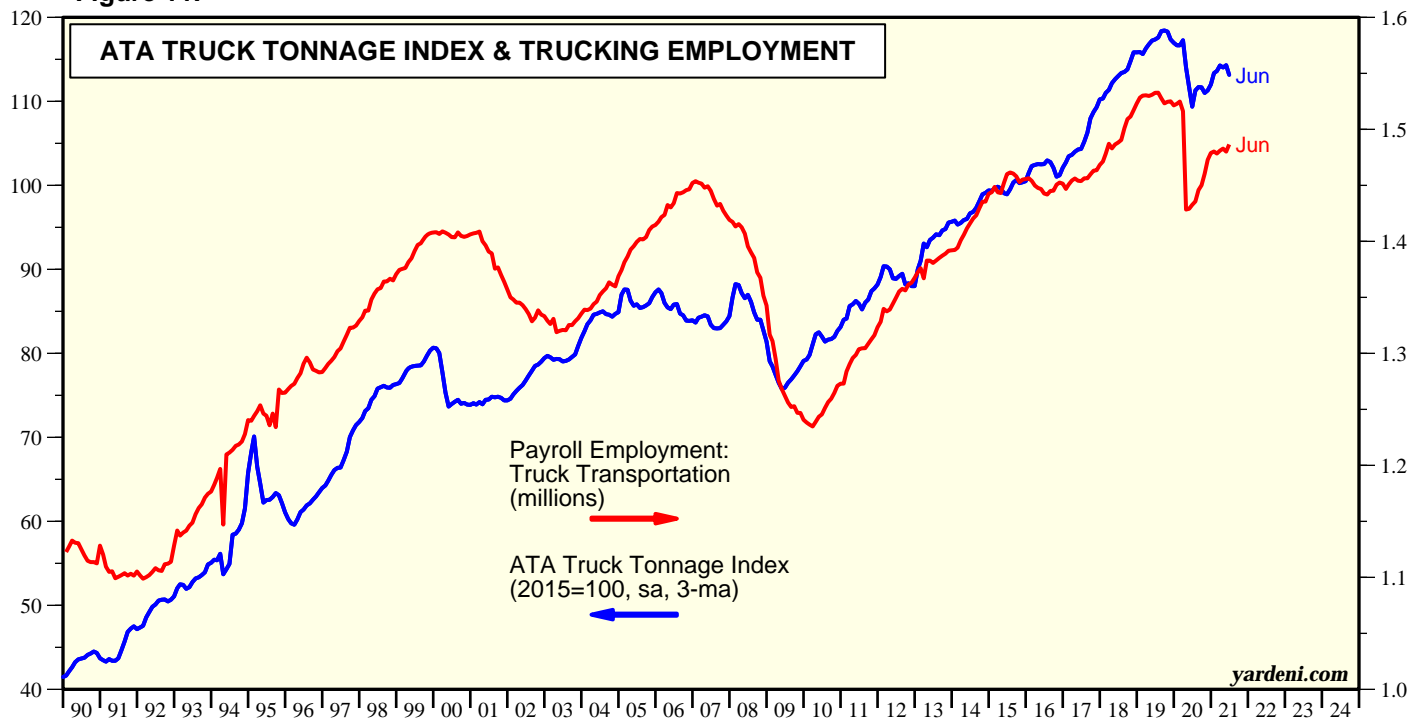
* Sum of Port of Los Angeles and Port of Long Beach Loaded Containers. TEUs=20-foot equivalent units.
Source: Ports of Los Angeles and Long Beach.

Figure 10.



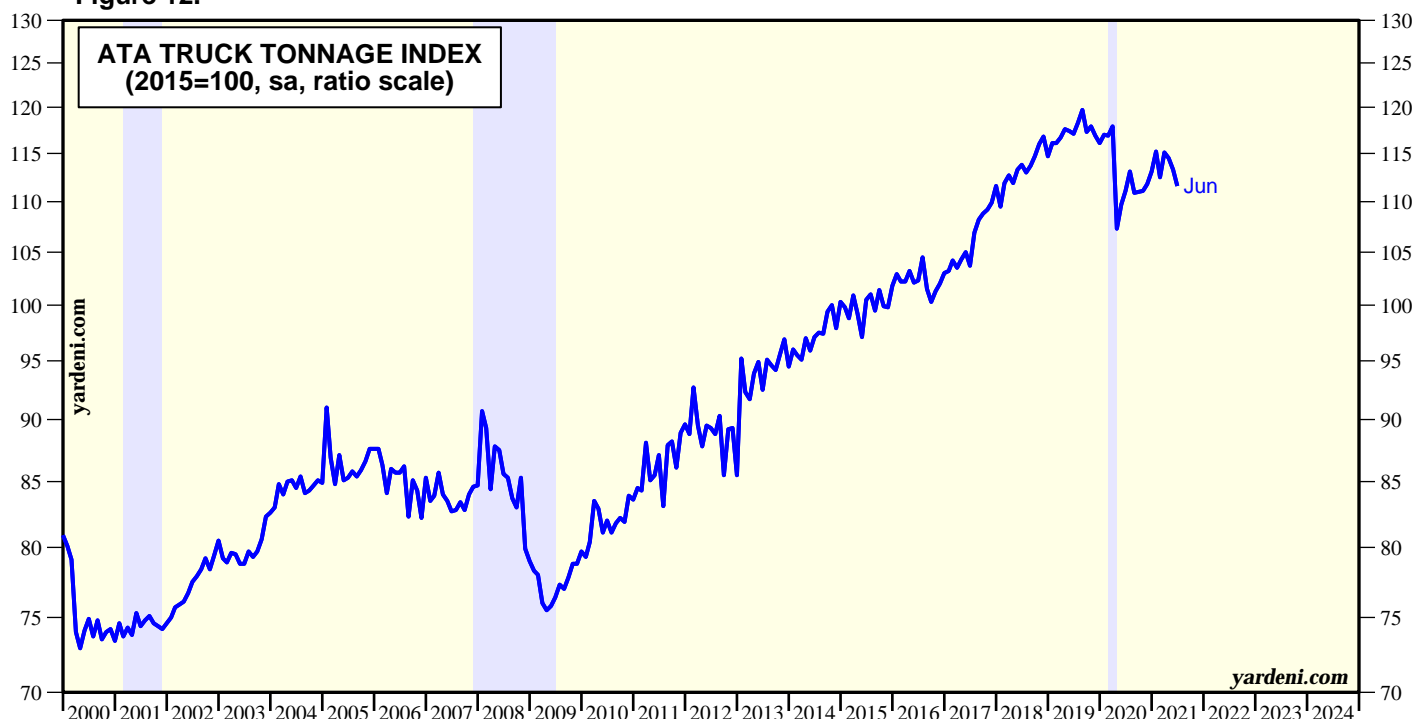
Source: Bureau of Labor Statistics.

Figure 11.



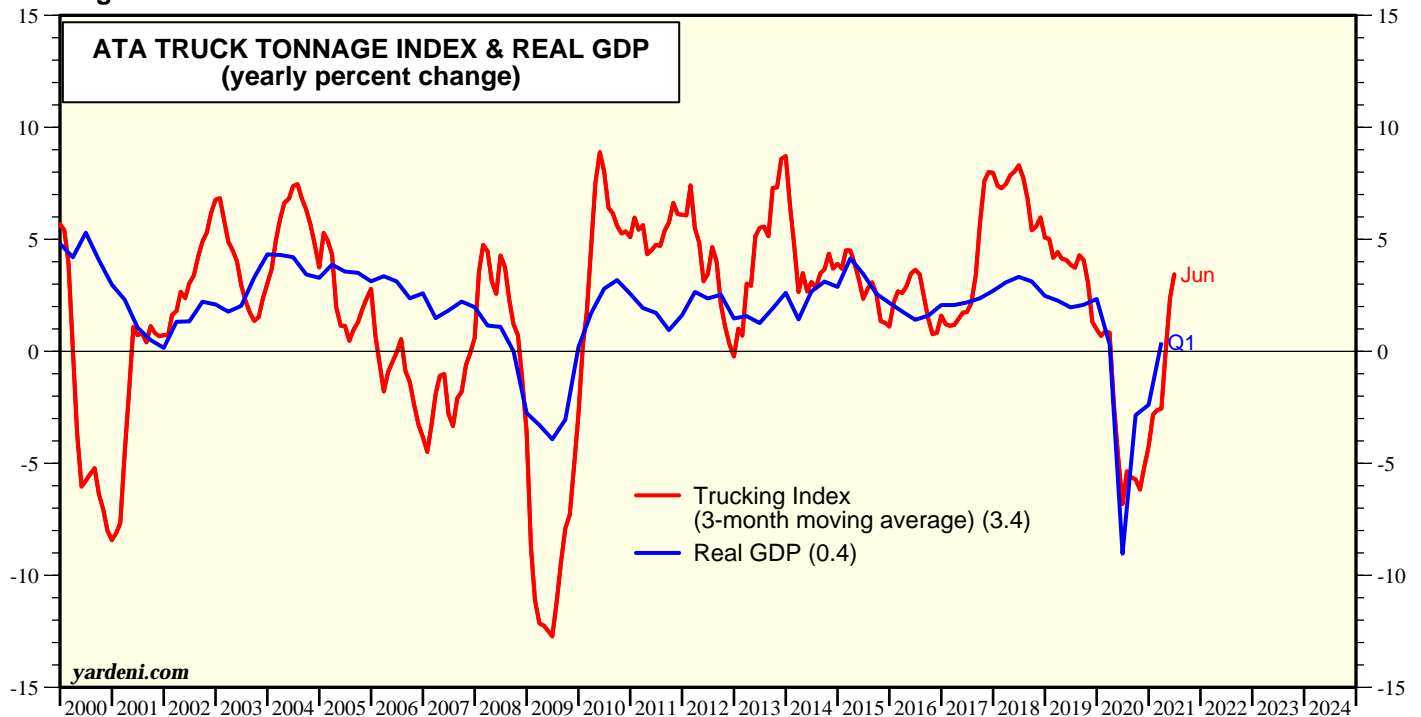
Source: American Trucking Association and Bureau of Labor Statistics.

Figure 12.



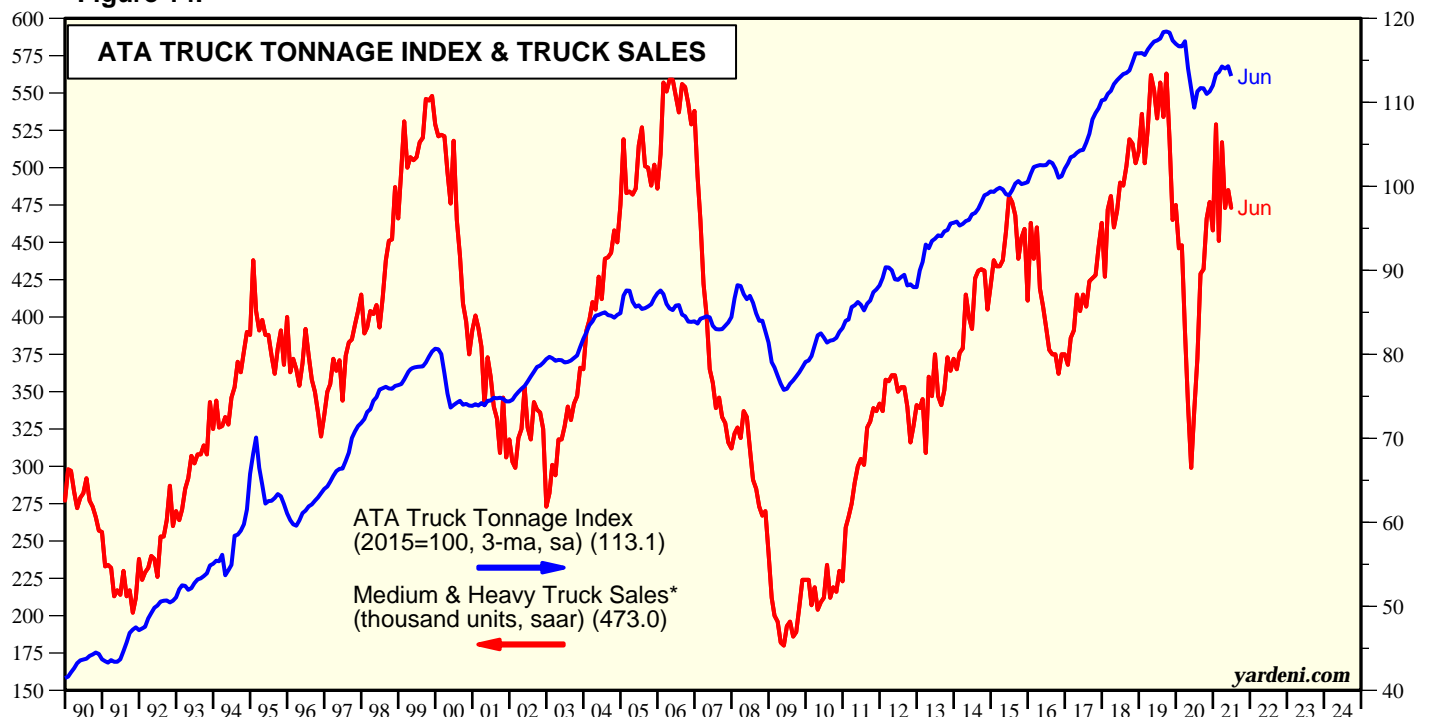
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: American Trucking Association.

Figure 13.



Source: American Trucking Association and Bureau of Economic Analysis.

Figure 14.



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

Figure 15.

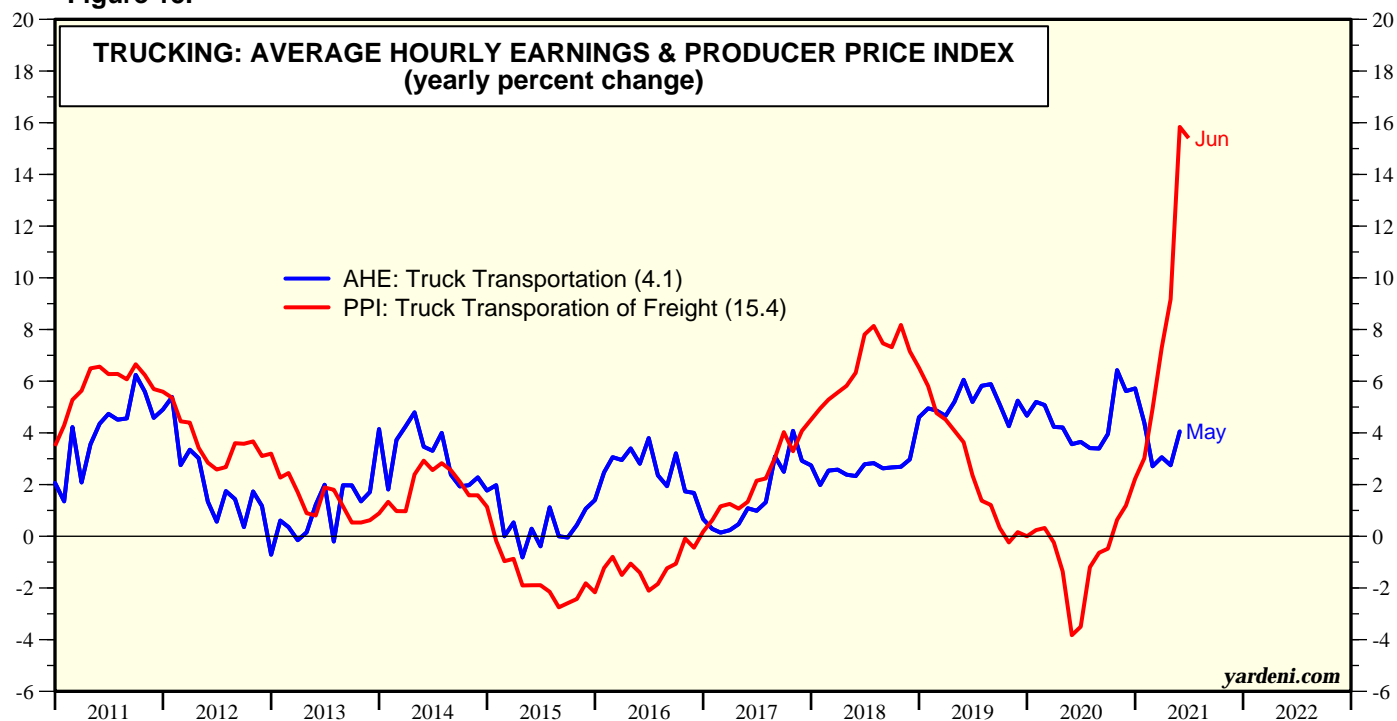


Figure 16.

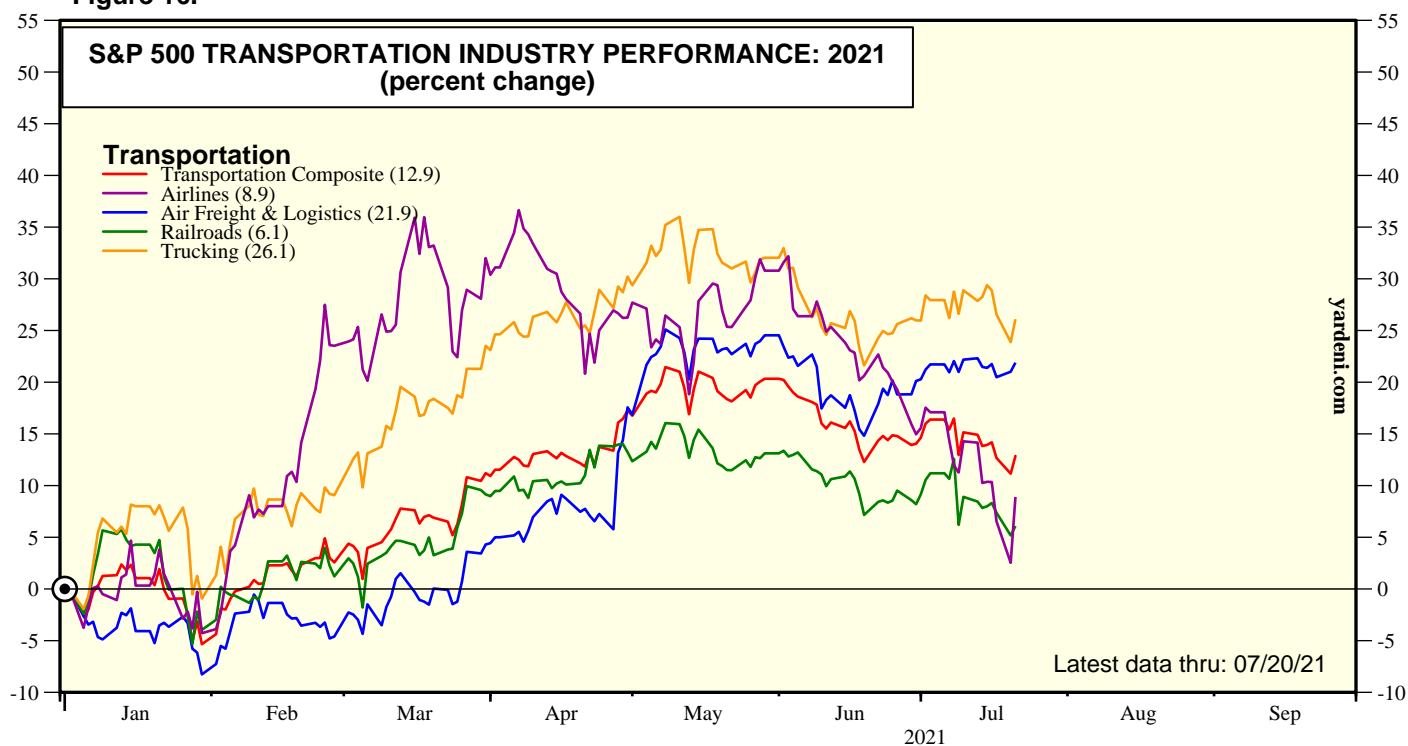
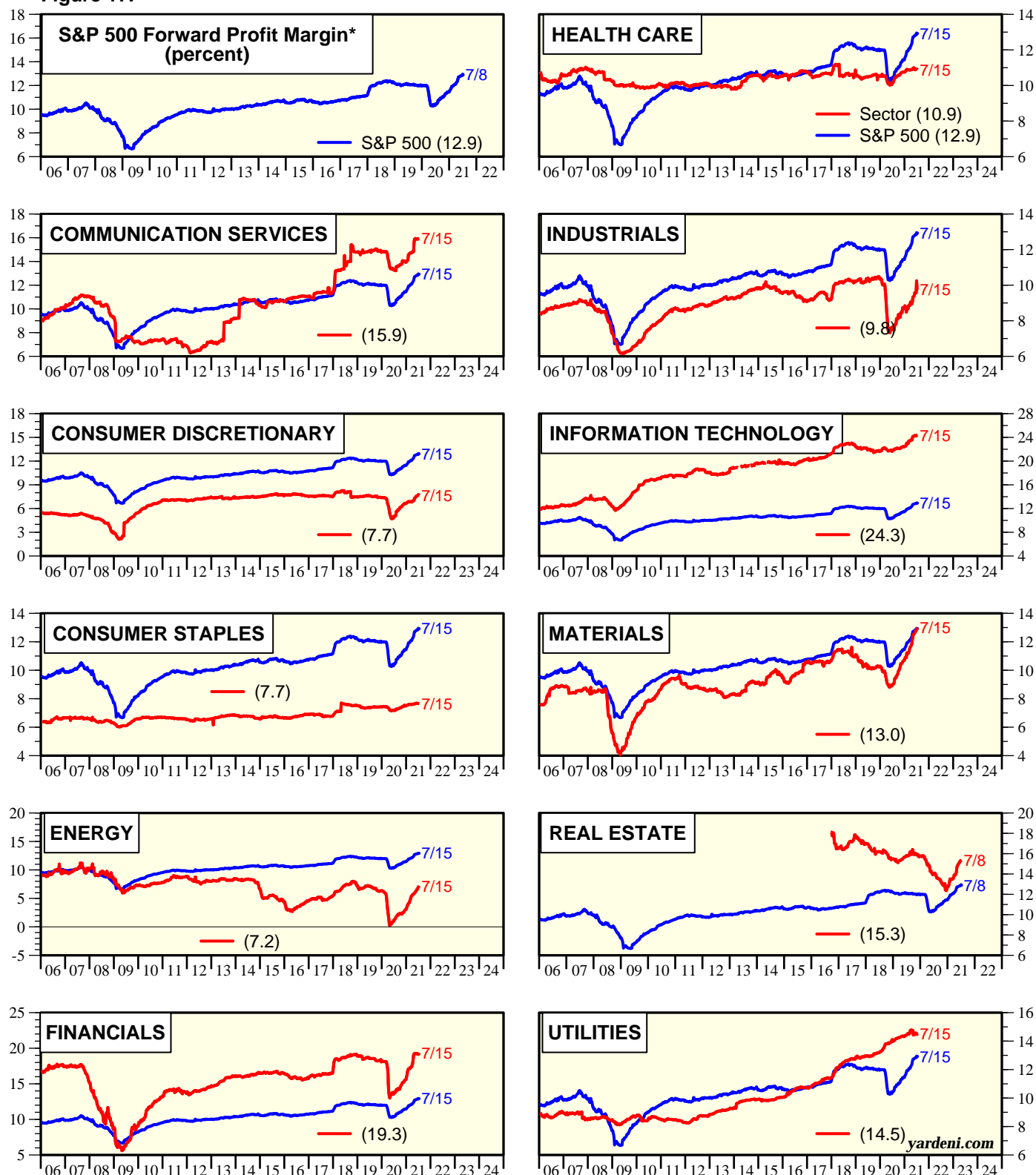
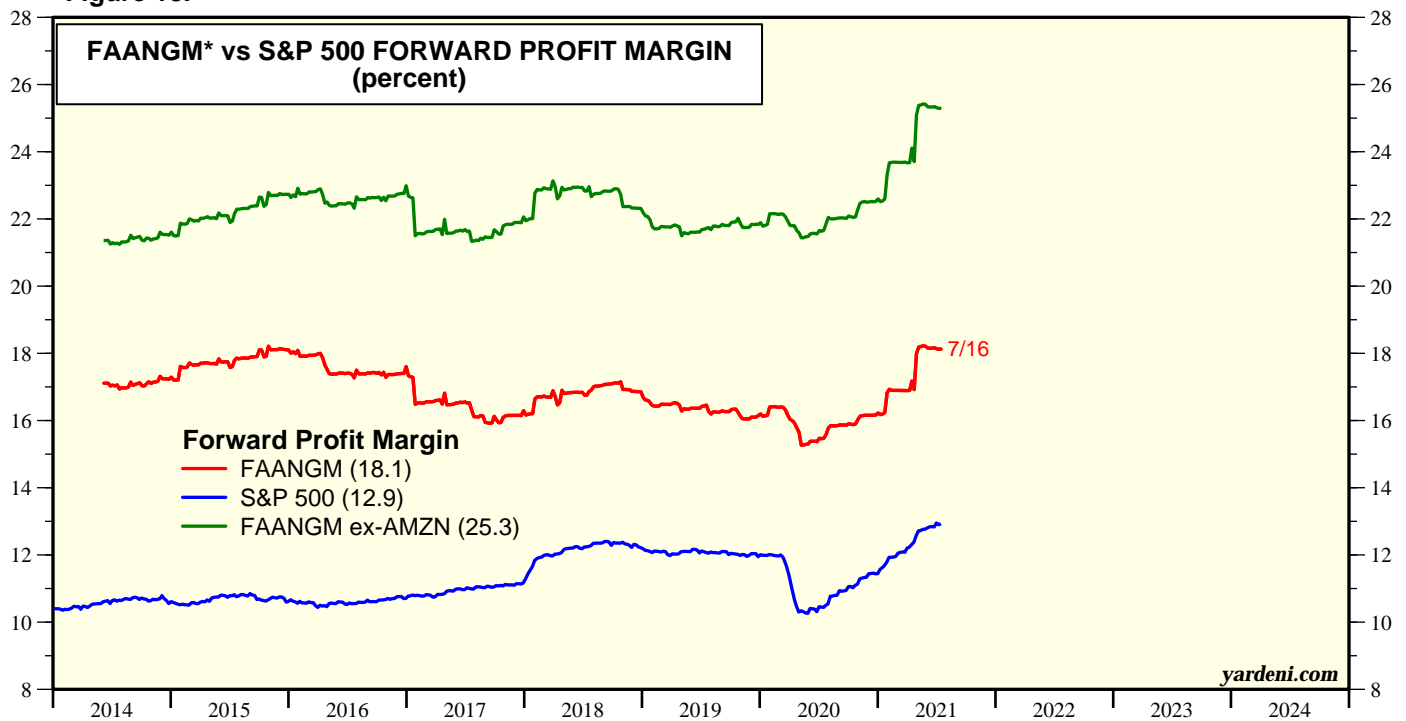


Figure 17.



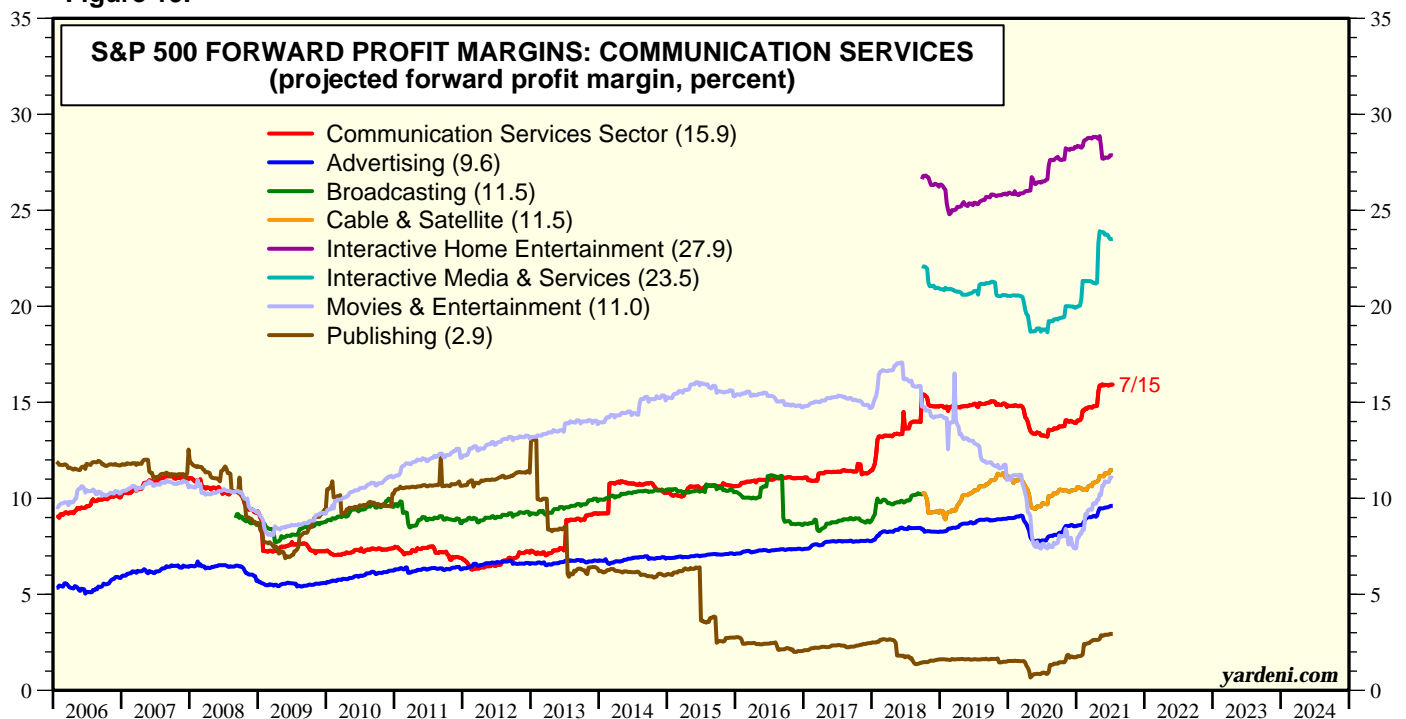
* Forward earnings divided by forward revenues.
Source: I/B/E/S data by Refinitiv.

Figure 18.



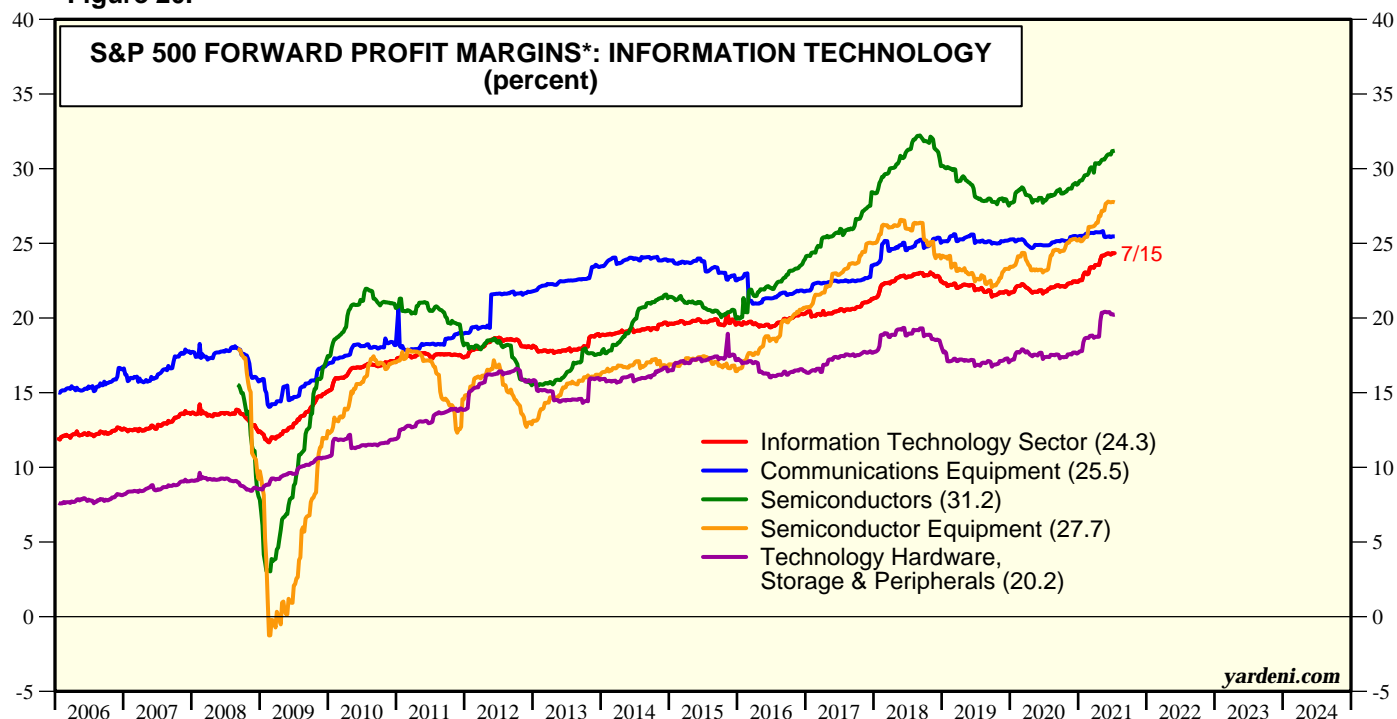
* FAANGM stocks include Facebook, Amazon, Apple, Netflix, Google (Alphabet), and Microsoft. Both classes of Alphabet are included.
Source: I/B/E/S data by Refinitiv.

Figure 19.



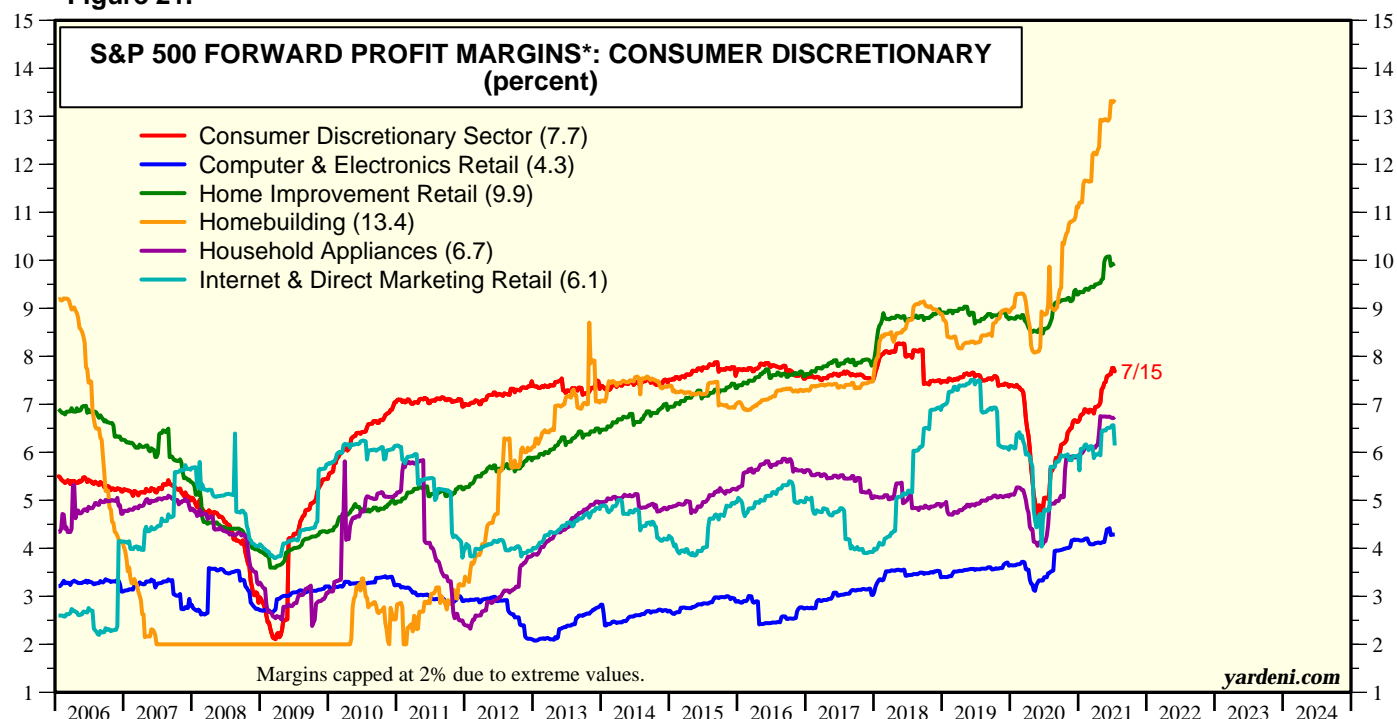
Source: I/B/E/S data by Refinitiv.

Figure 20.



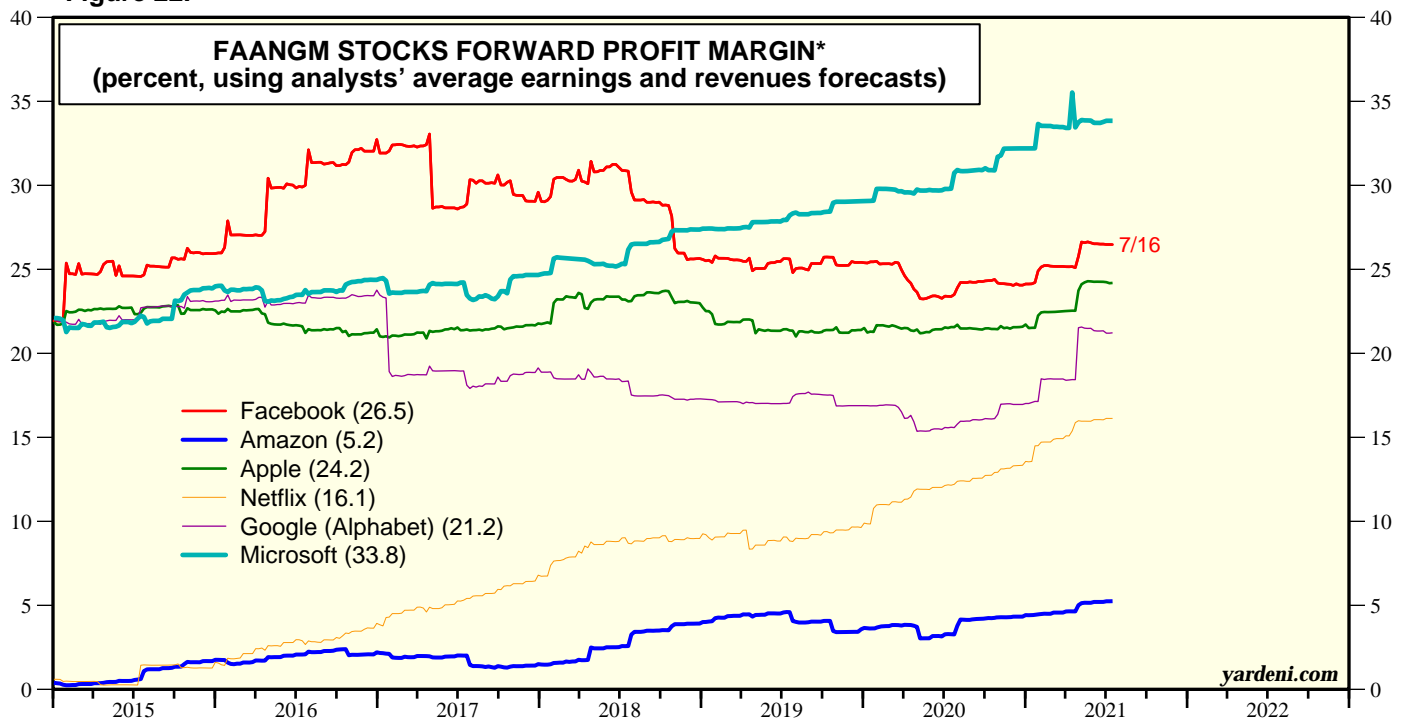
* Forward earnings divided by forward revenues.
Source: I/B/E/S data by Refinitiv.

Figure 21.



* Forward earnings divided by forward revenues.
Source: I/B/E/S data by Refinitiv.

Figure 22.



* FAANGM stocks include Facebook, Amazon, Apple, Netflix, Google (Alphabet), and Microsoft.
Source: I/B/E/S data by Refinitiv.

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