

Chart Collection for Morning Briefing

Yardeni Research, Inc.

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Dr. Edward Yardeni

516-972-7683

eyardeni@yardeni.com

Mali Quintana

480-664-1333

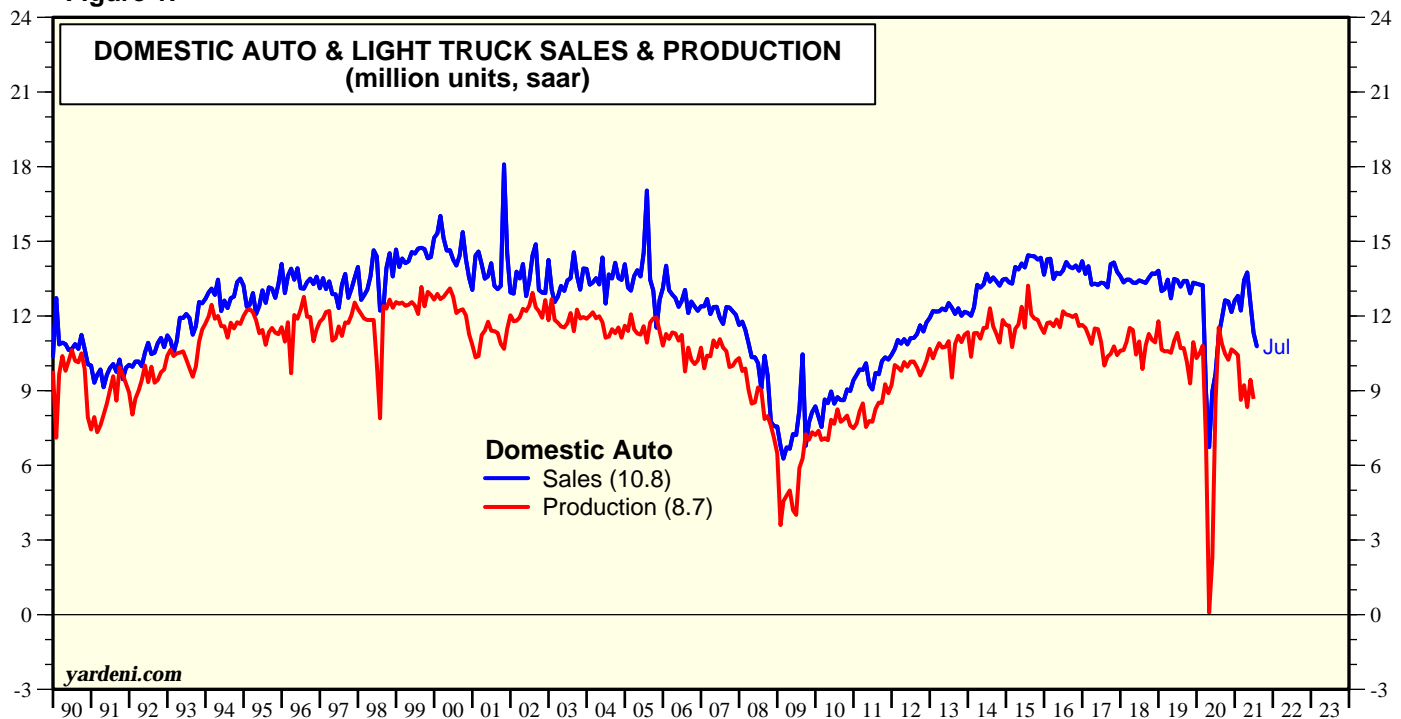
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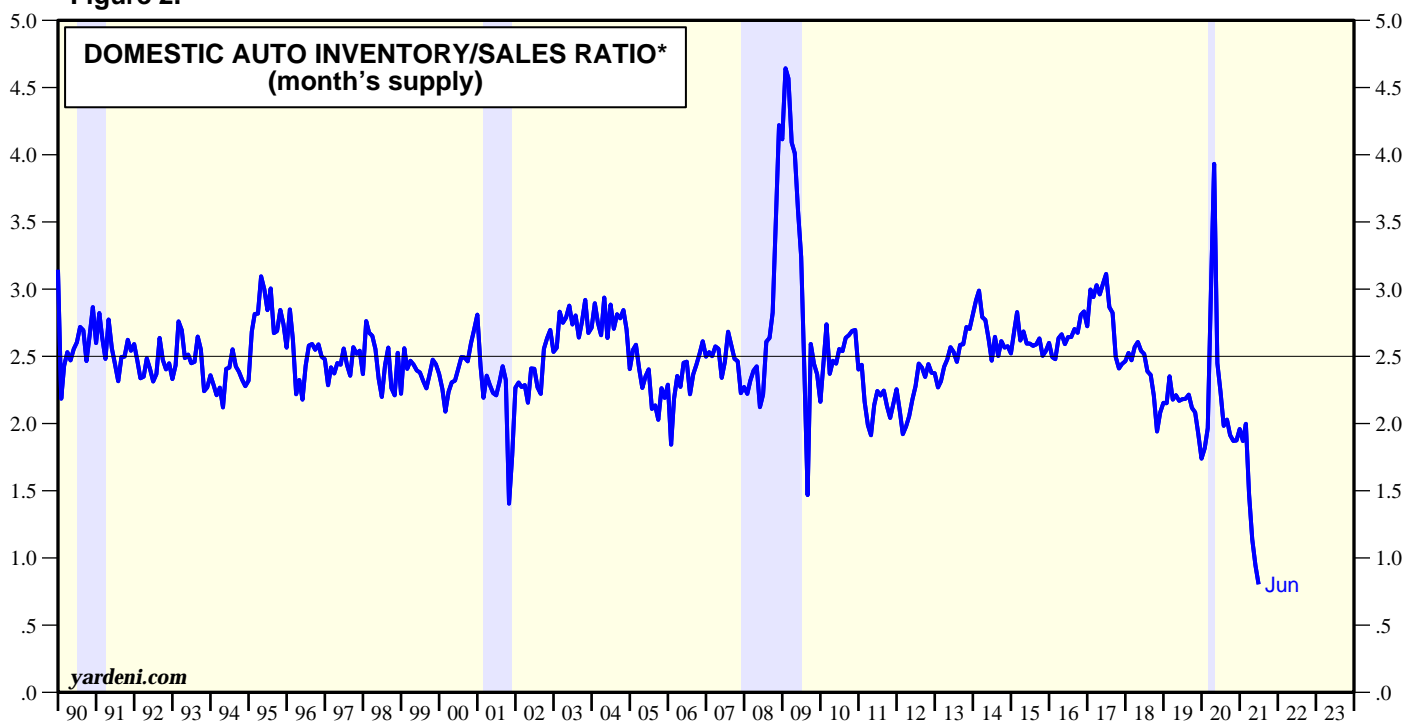
thinking outside the box

Figure 1.



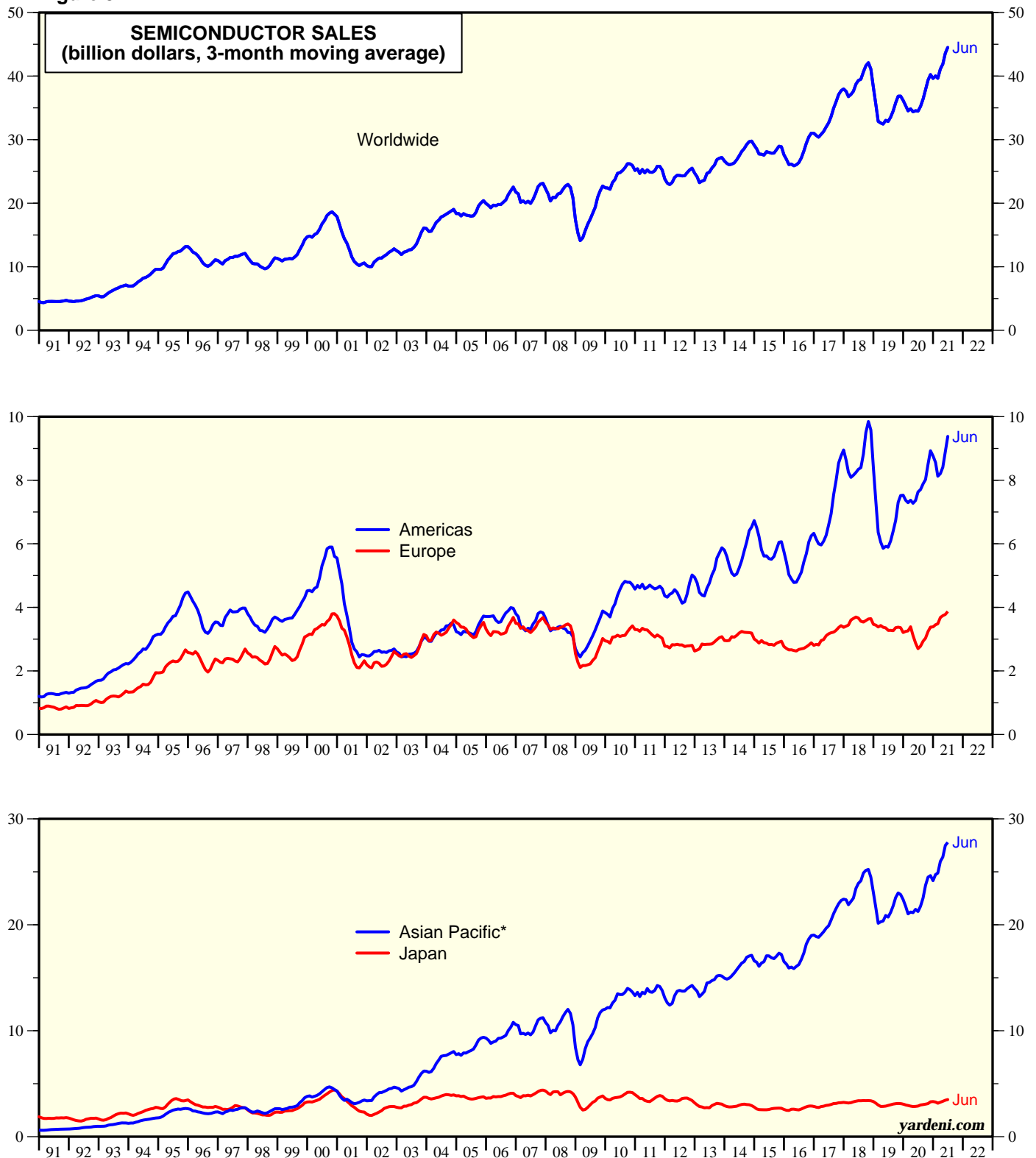
Source: Bureau of Economic Analysis and Federal Reserve Board.

Figure 2.



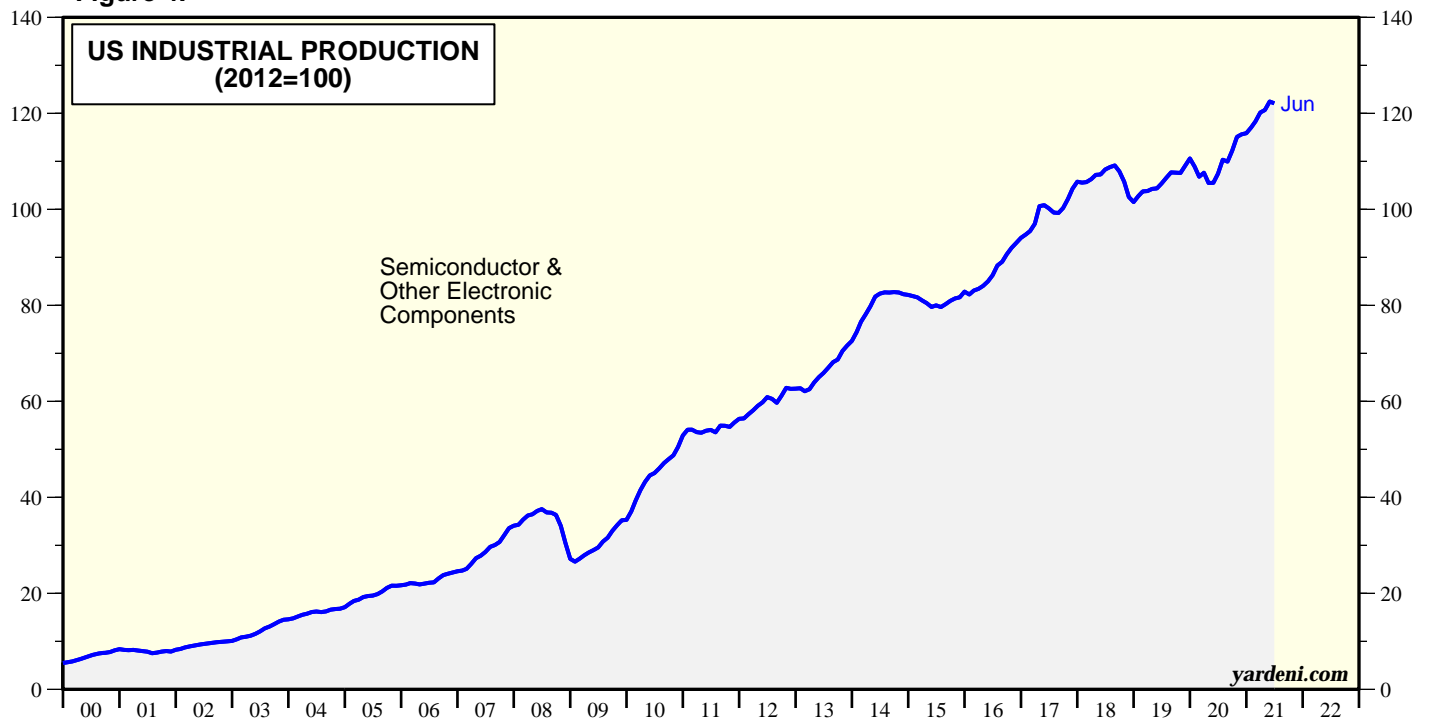
* Autos produced in US, Canada, and Mexico and sold in US.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Bureau of Economic Analysis.

Figure 3.



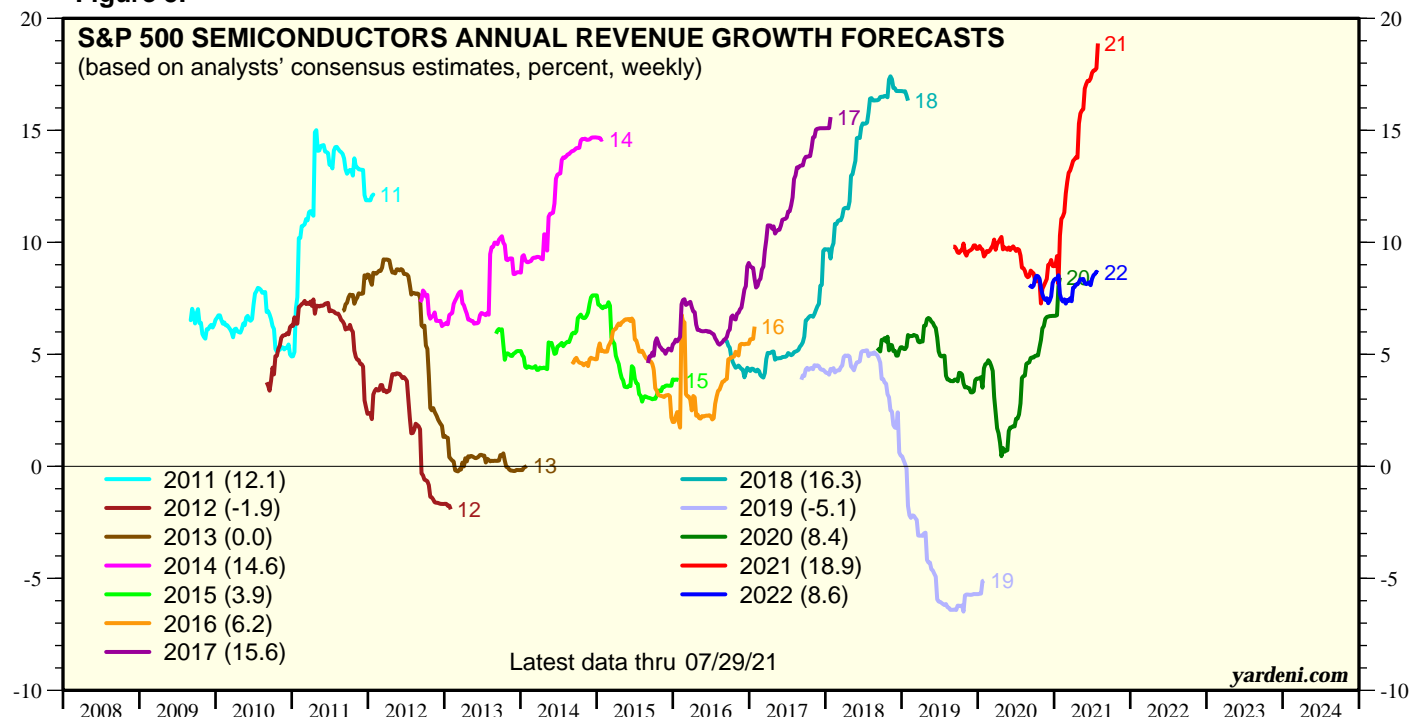
* Including China.
Source: Semiconductor Industry Association and I/B/E/S data by Refinitiv.

Figure 4.



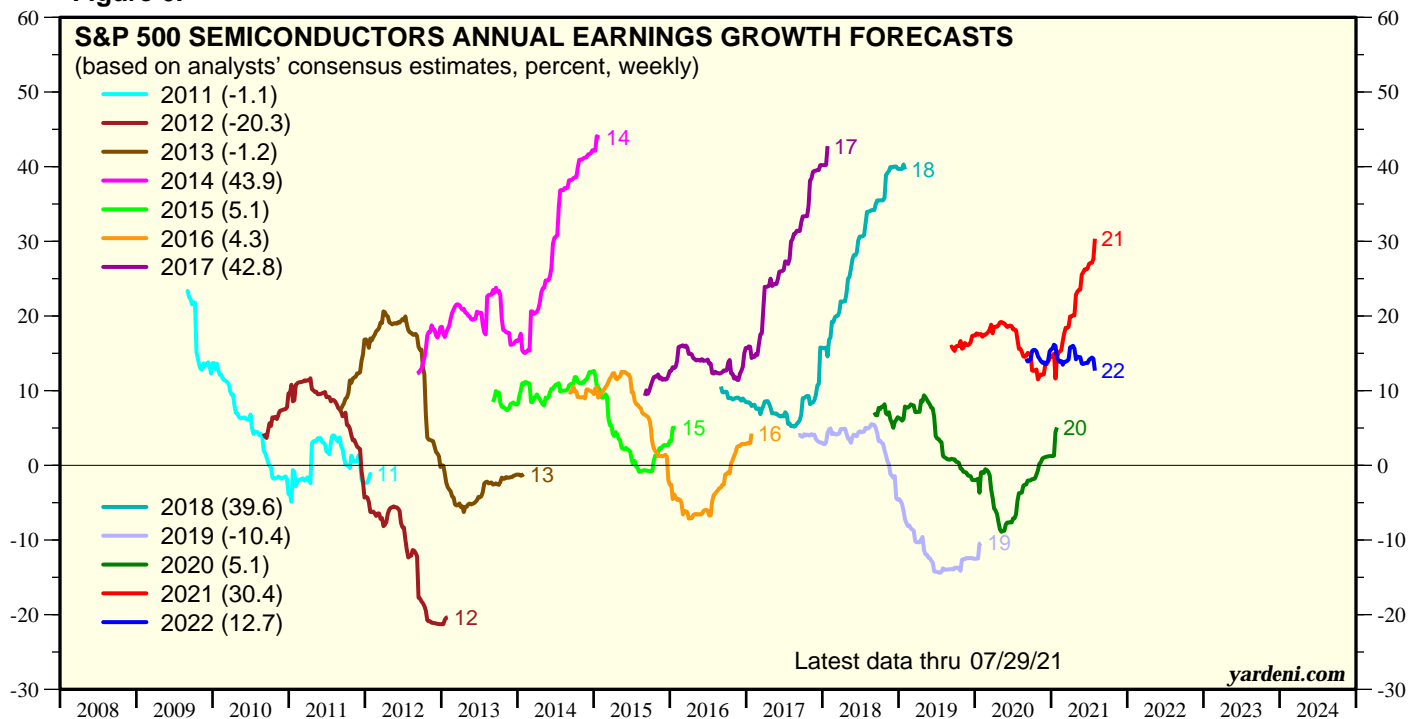
Source: Board of Governors of the Federal Reserve System.

Figure 5.



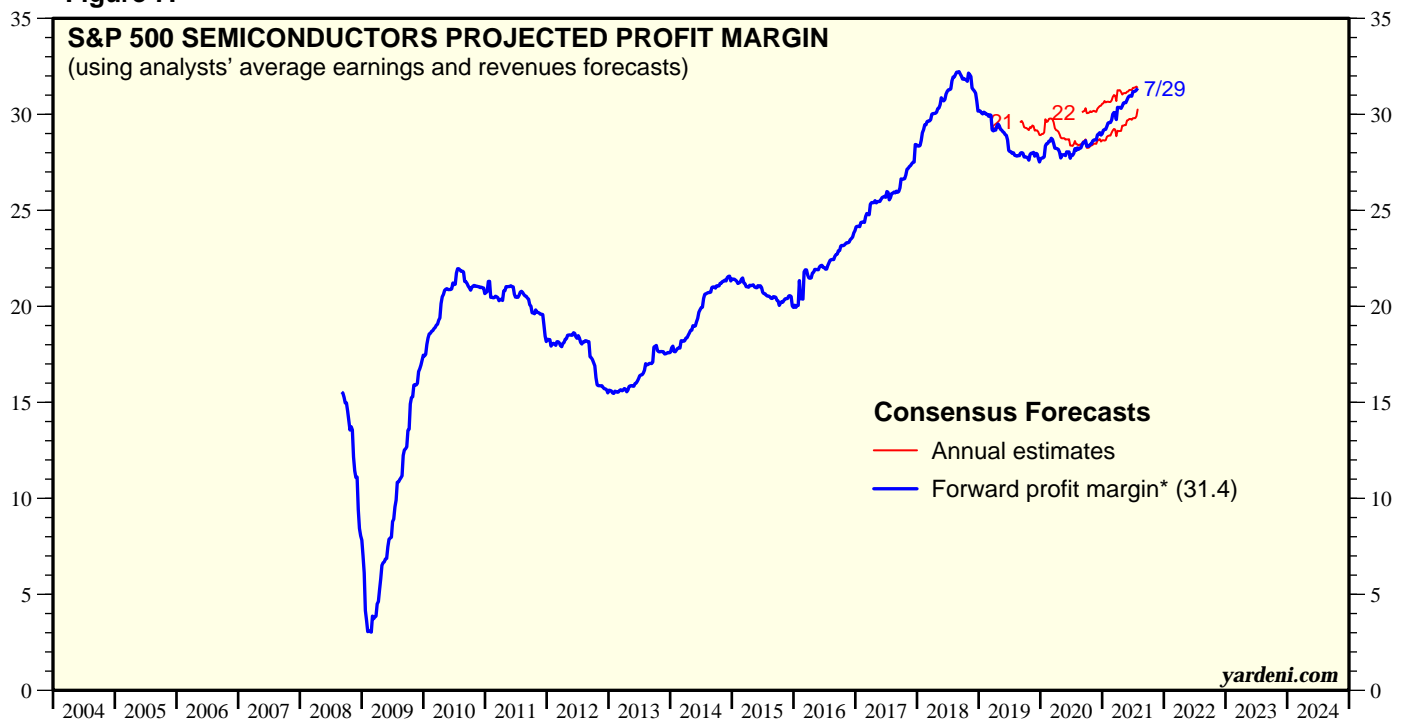
Source: I/B/E/S data by Refinitiv.

Figure 6.



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

Figure 7.



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

Figure 8.

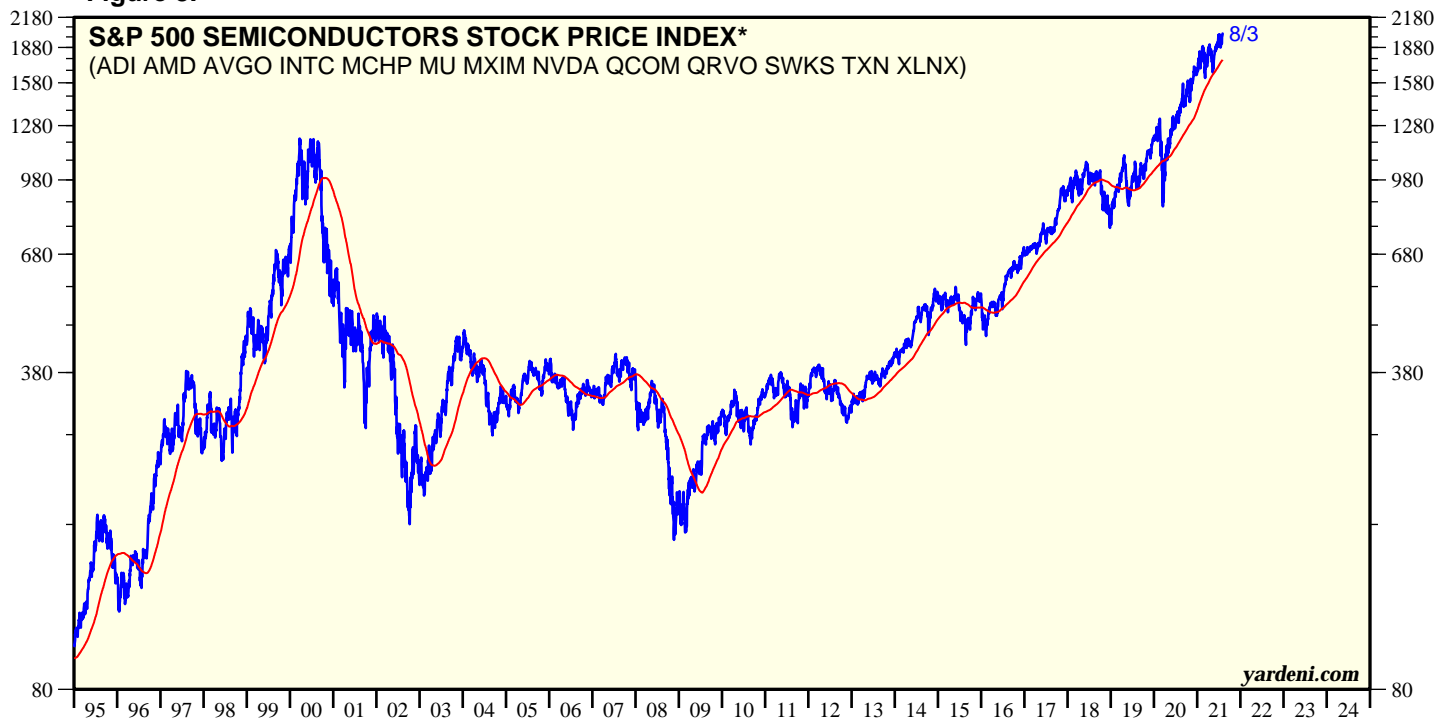


Figure 9.

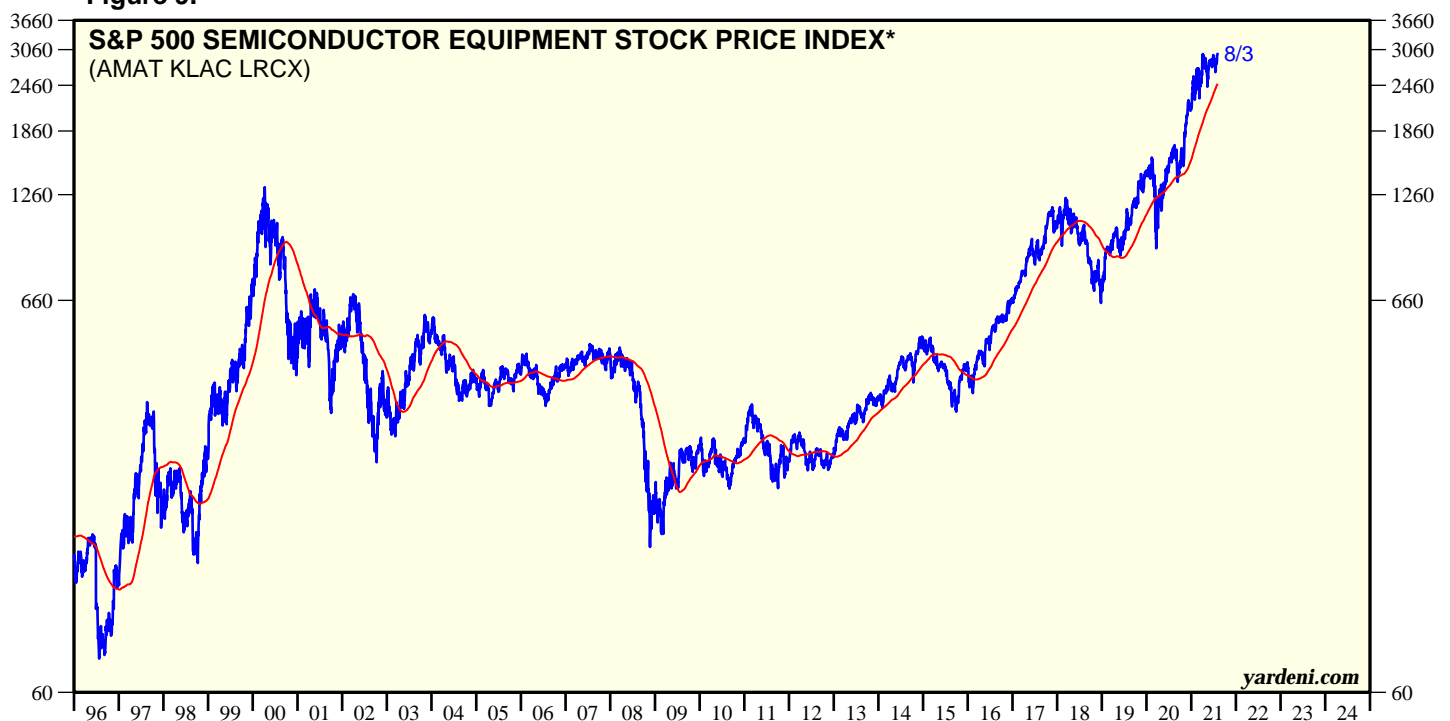
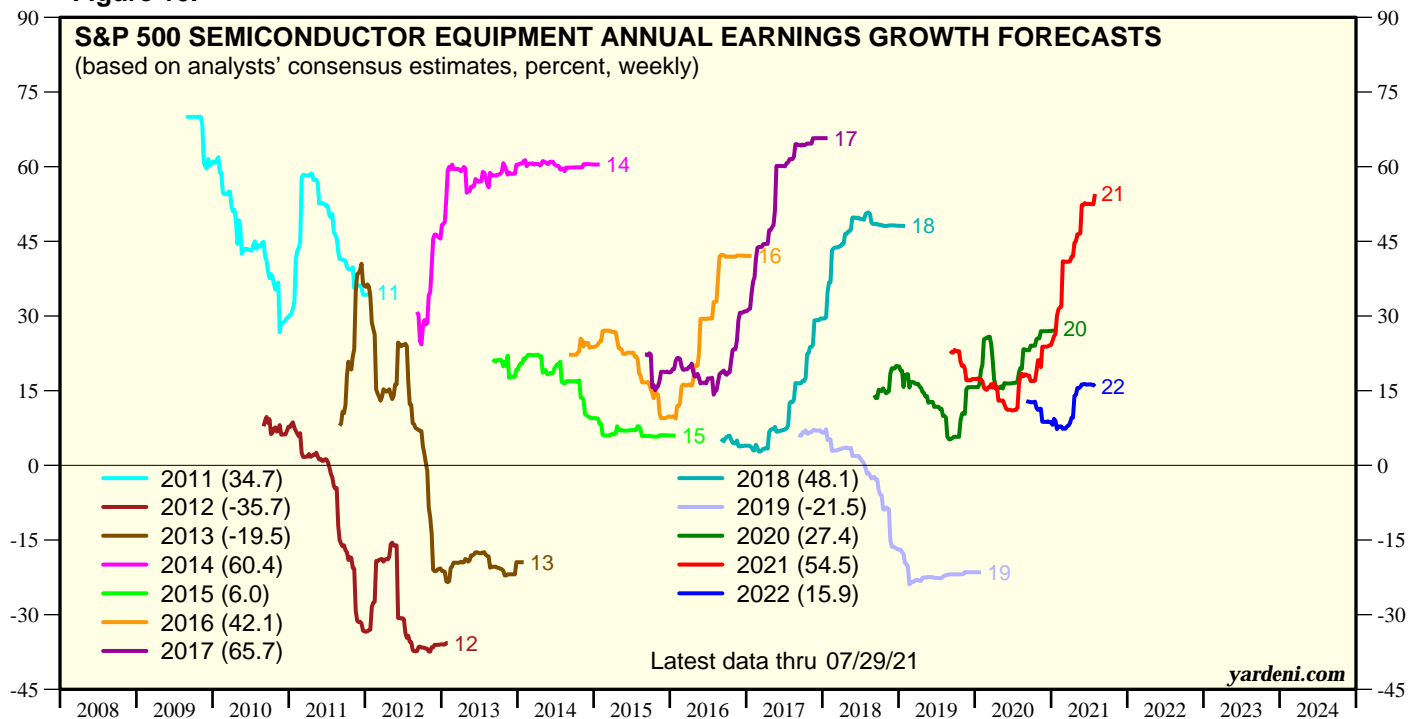
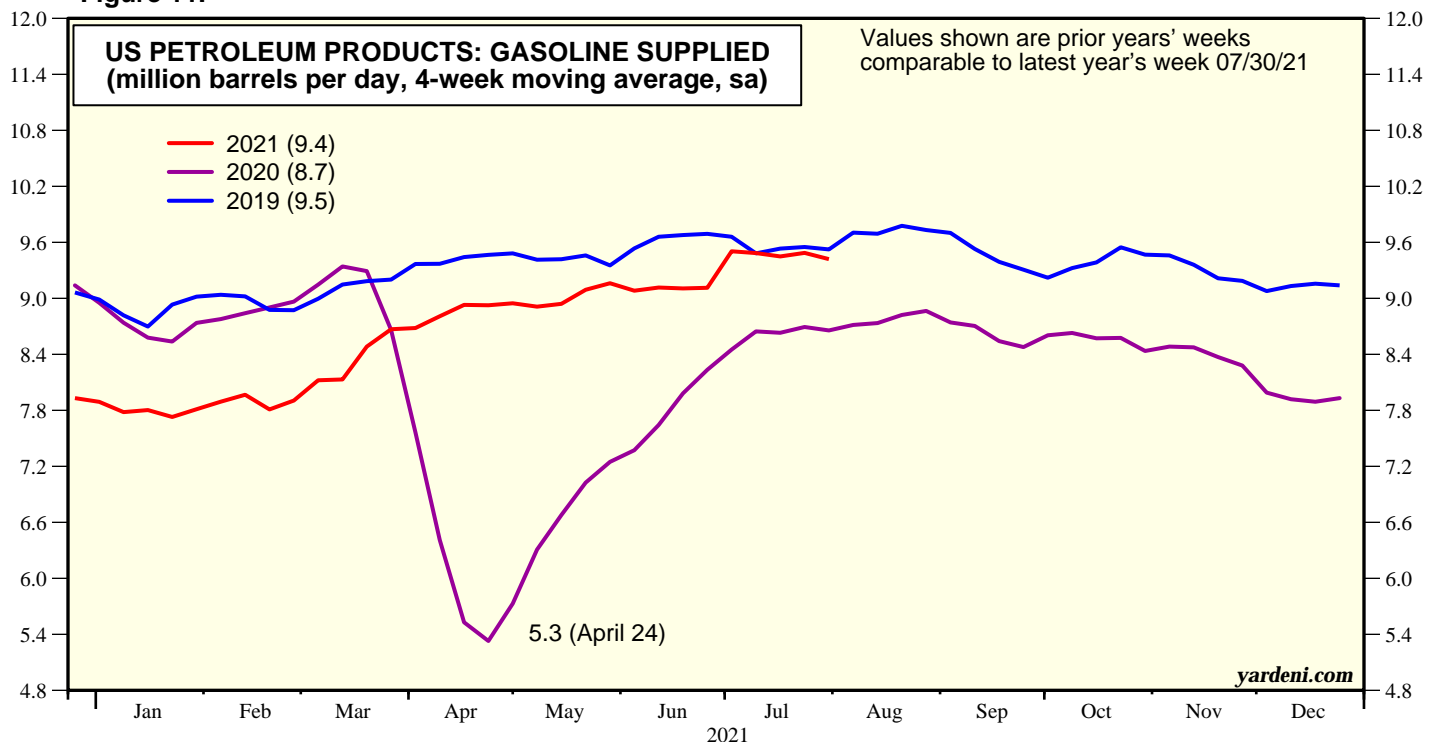


Figure 10.



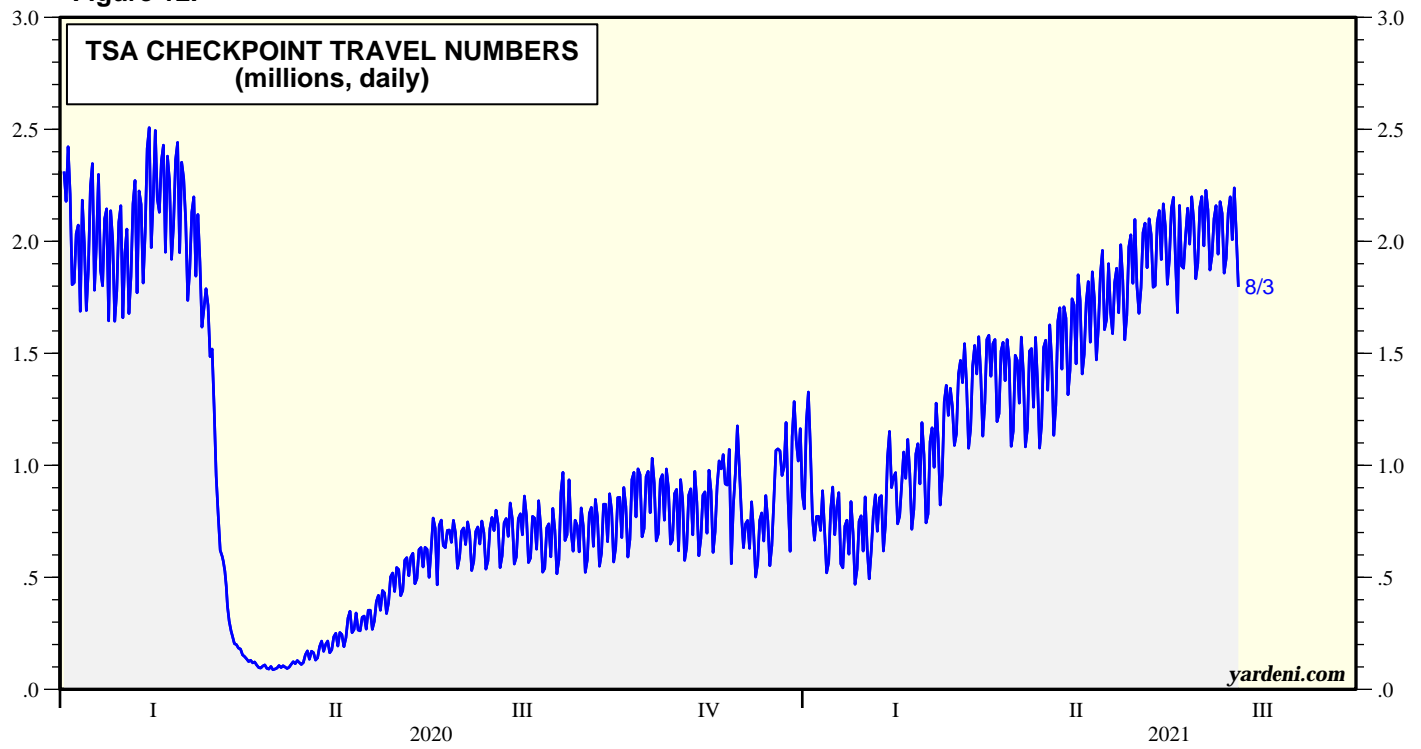
Source: I/B/E/S data by Refinitiv.

Figure 11.



Source: US Department of Energy and Haver Analytics.

Figure 12.



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