

Chart Collection for Morning Briefing

Yardeni Research, Inc.

September 8, 2021

Dr. Edward Yardeni

516-972-7683

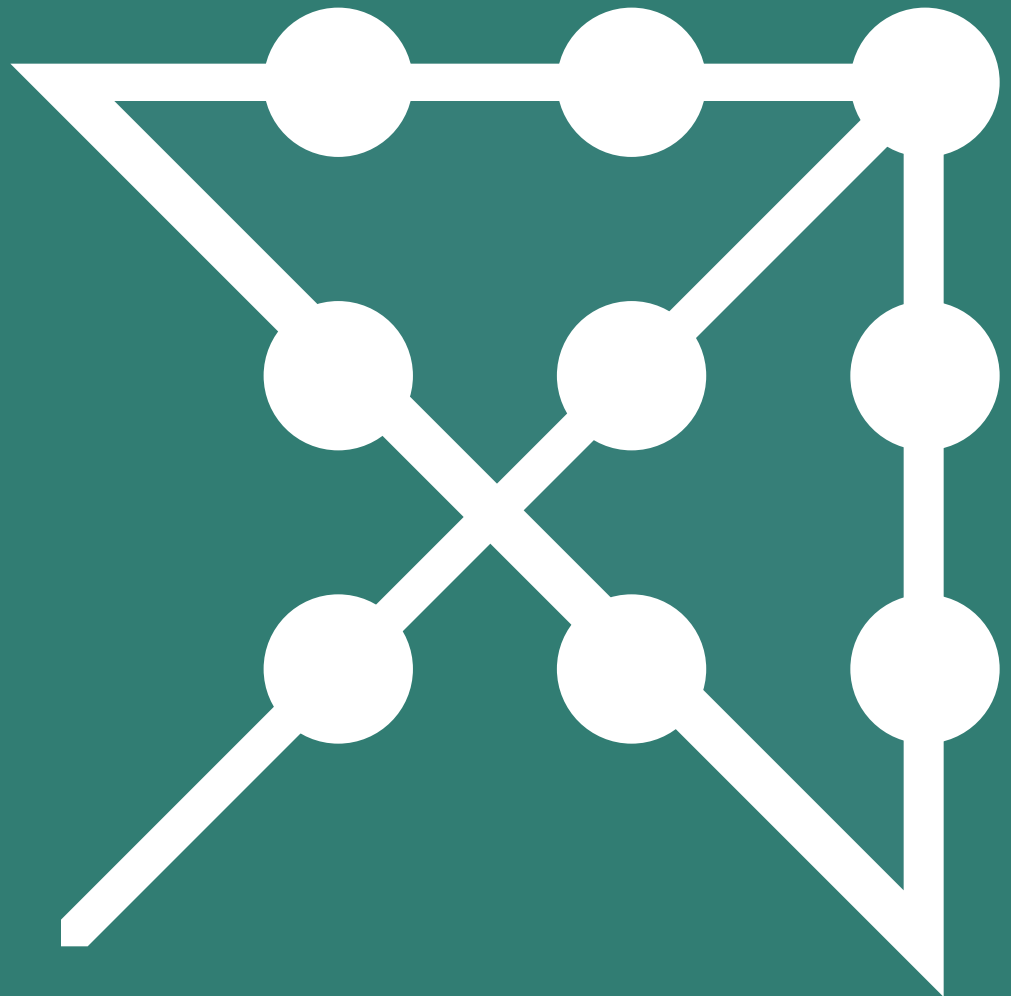
eyardeni@yardeni.com

Mali Quintana

480-664-1333

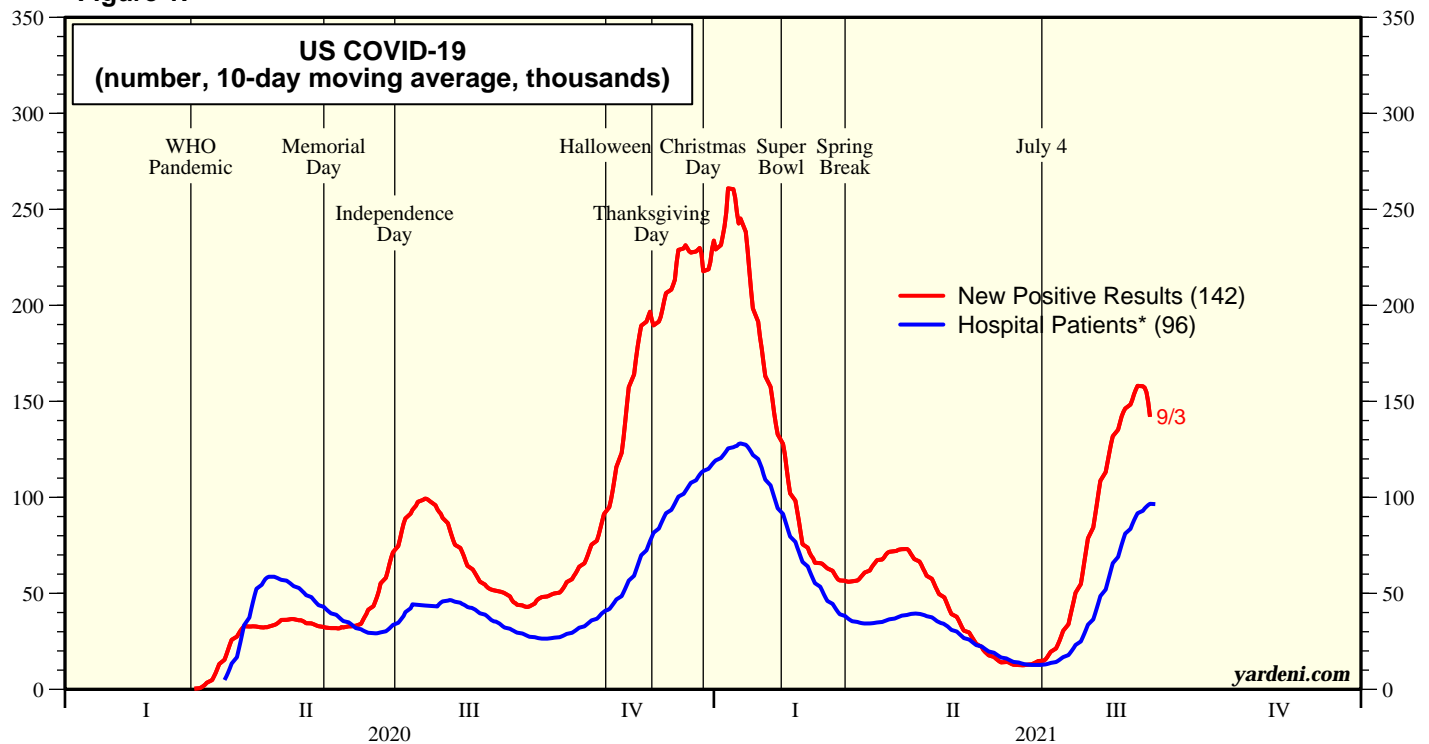
aquintana@yardeni.com

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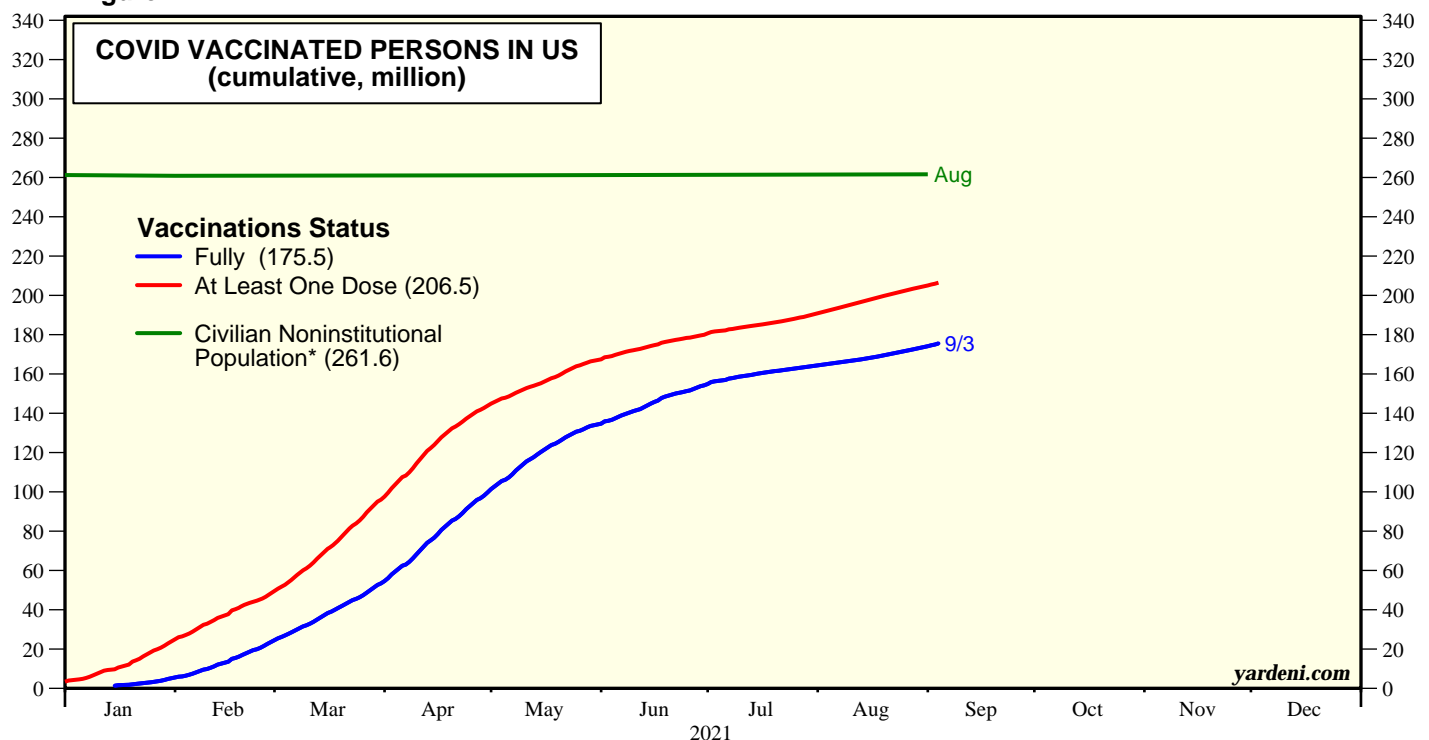
thinking outside the box

Figure 1.



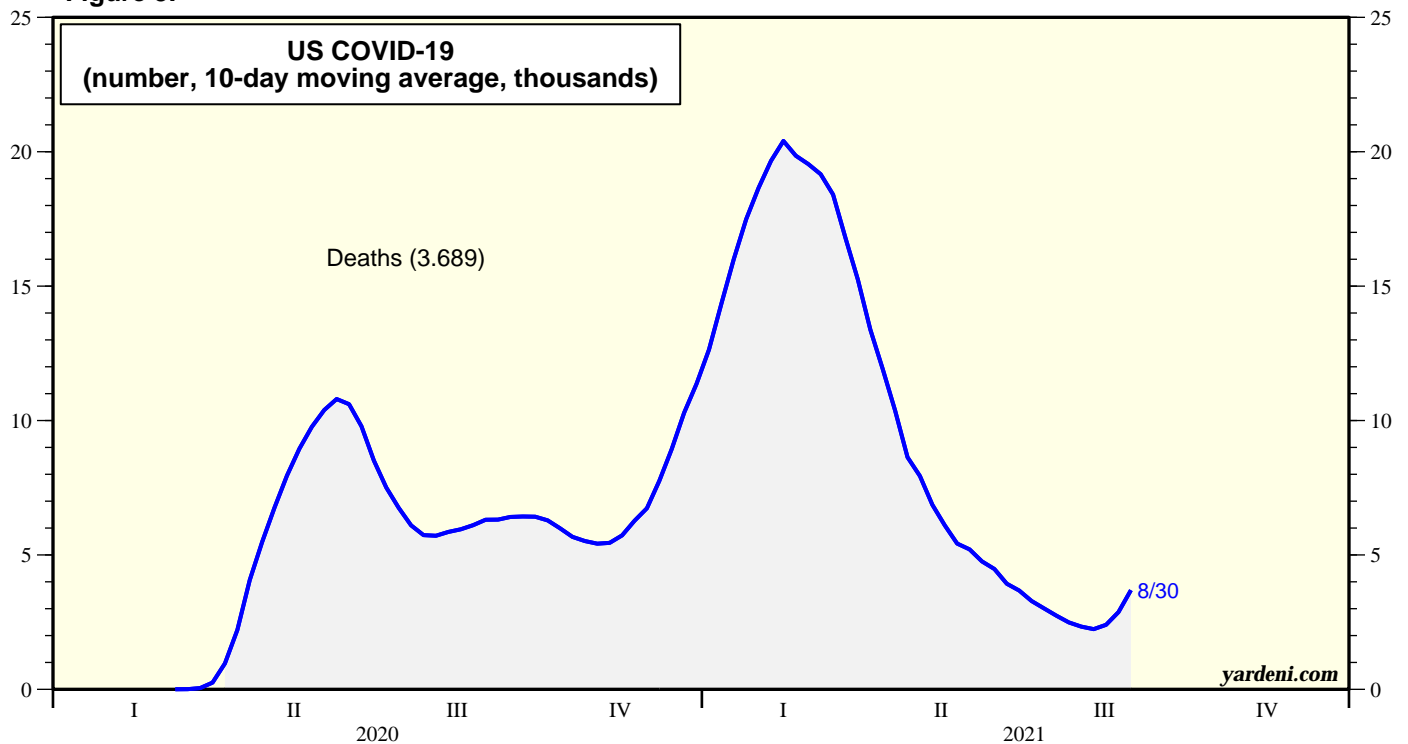
* Note: Data for hospital patients from July 2020 to the present is from Oxford University, prior to that data is from COVID Tracking Project.
 Source: Department of Health & Human Services, Centers for Disease Control & Prevention, COVID Tracking Project and Oxford University.

Figure 2.



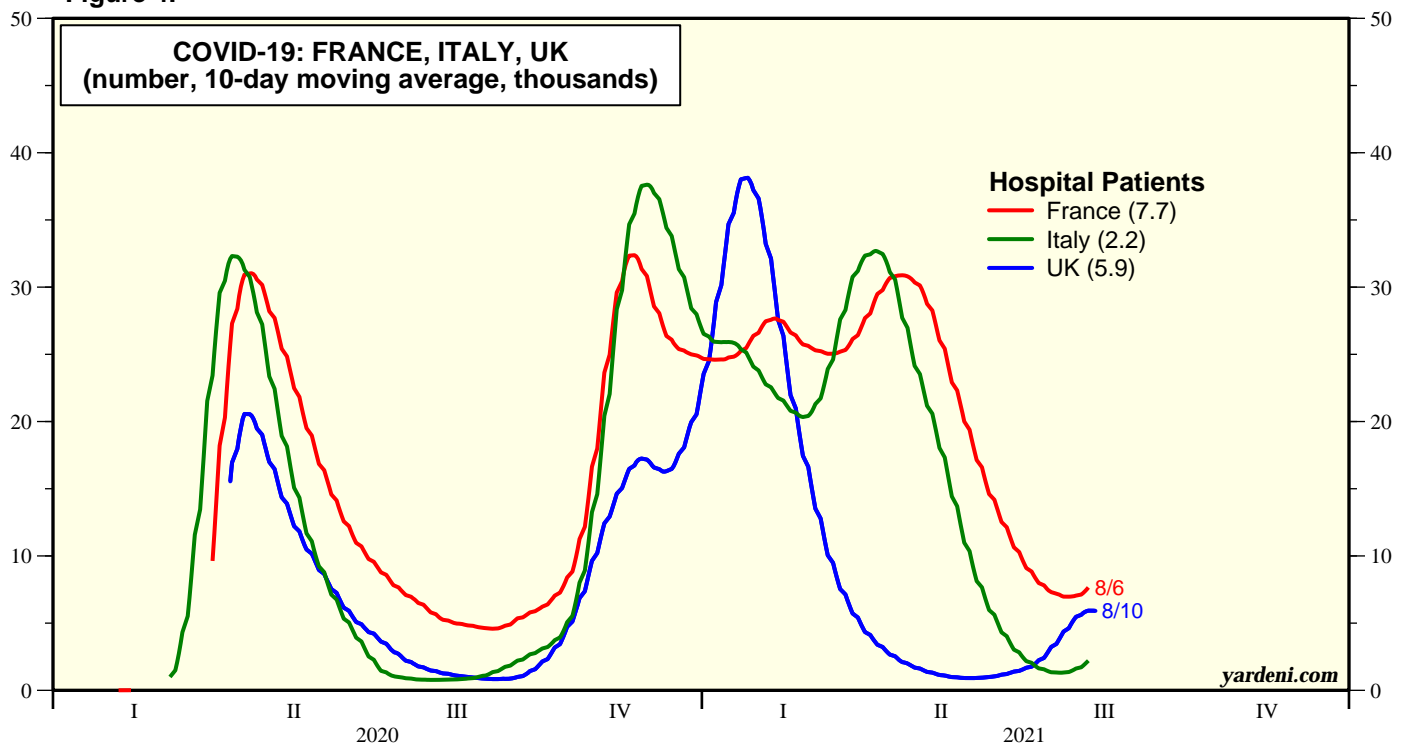
* Population 16 years and older.
 Source: Johns Hopkins Hospital and Bureau of Labor Statistics.

Figure 3.



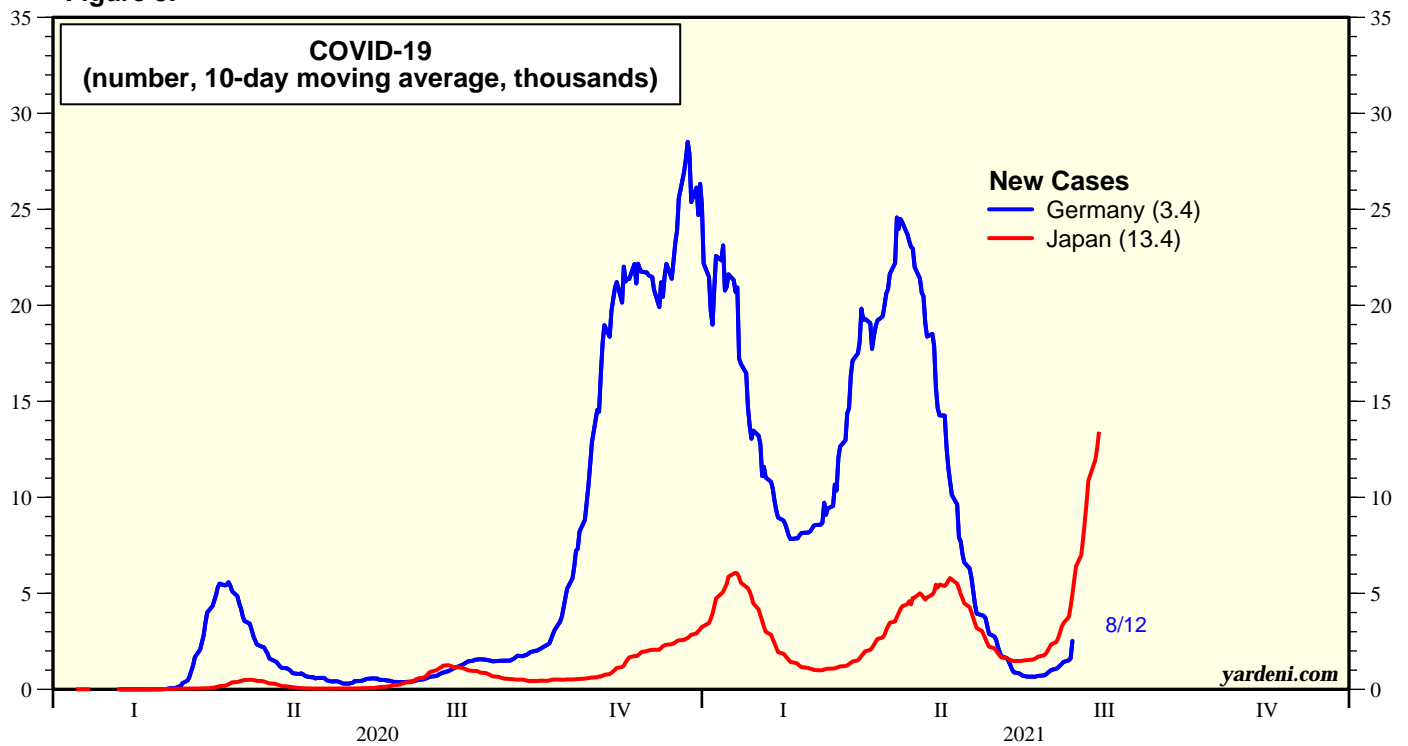
Source: European Centre for Disease Prevention and Control.

Figure 4.



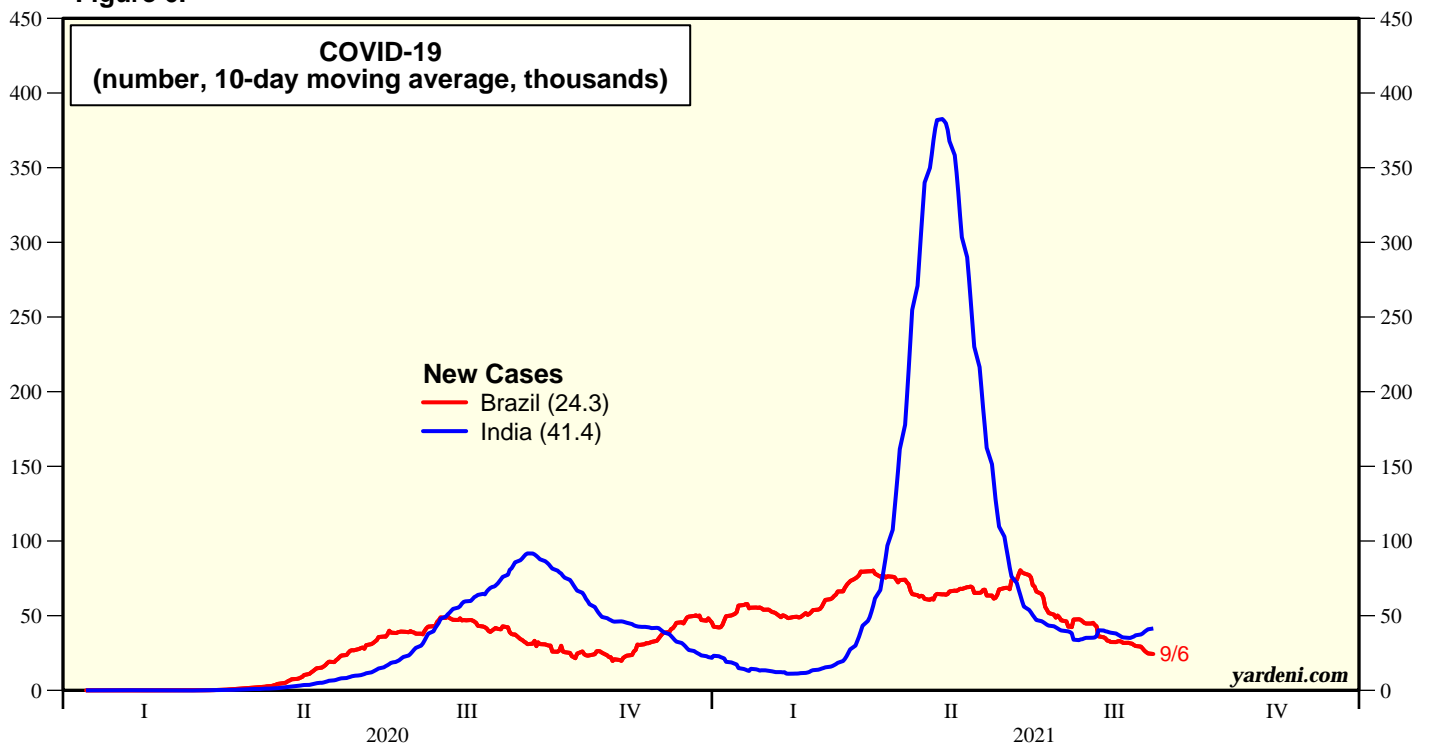
Source: Oxford University.

Figure 5.



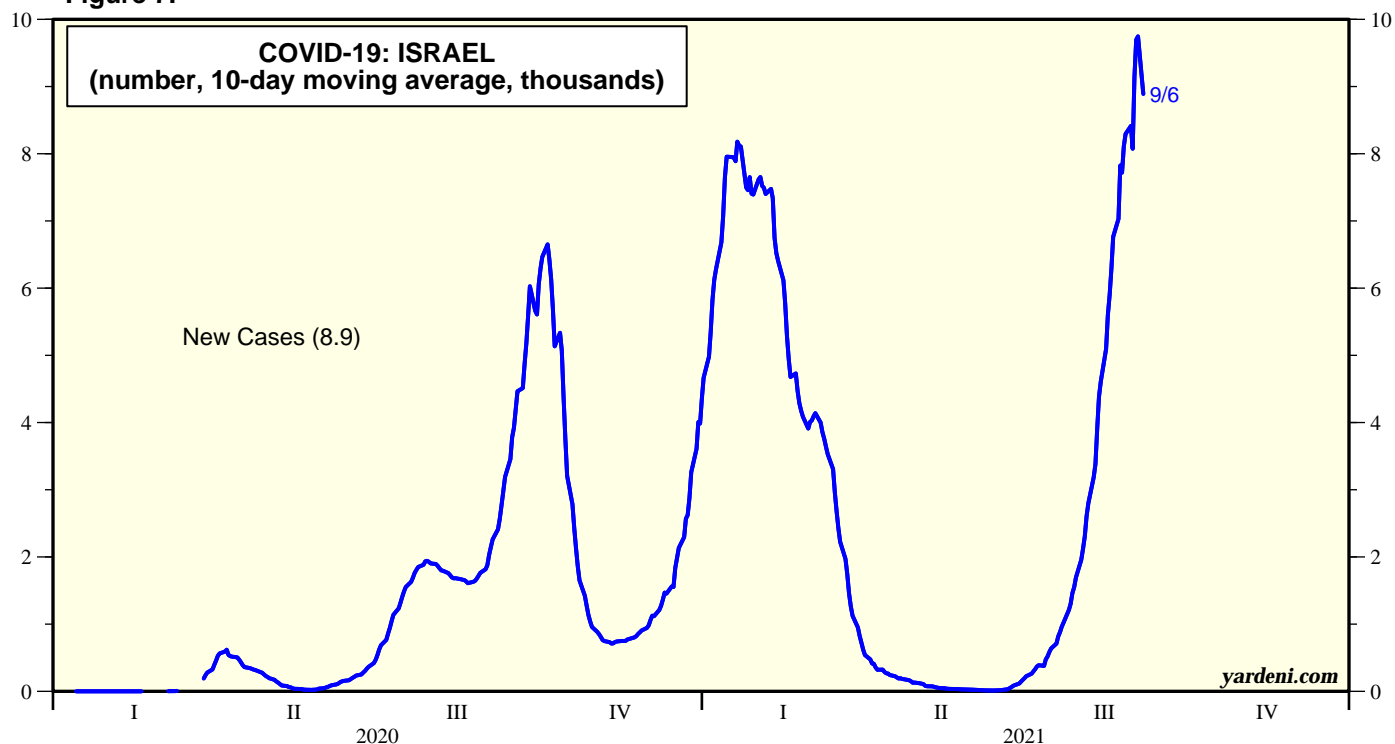
Source: Oxford University.

Figure 6.



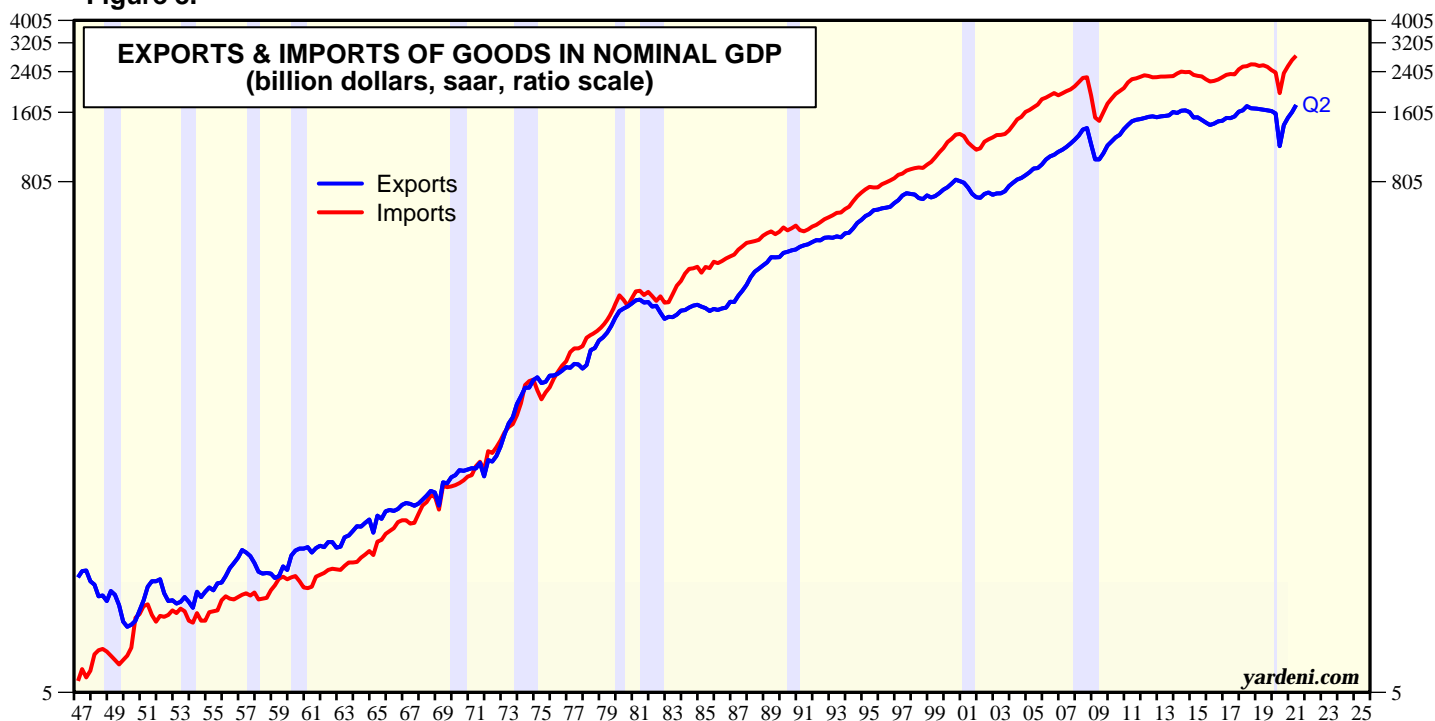
Source: Oxford University.

Figure 7.



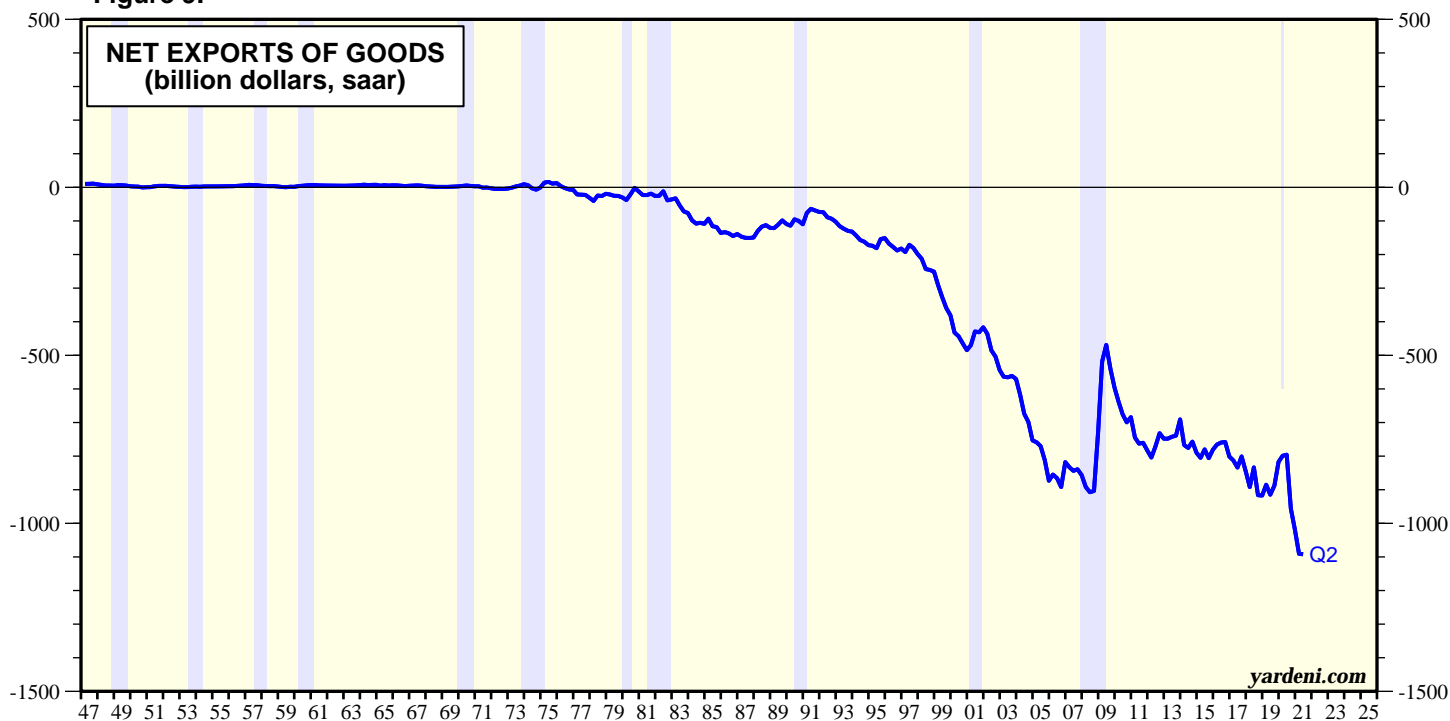
Source: Oxford University.

Figure 8.



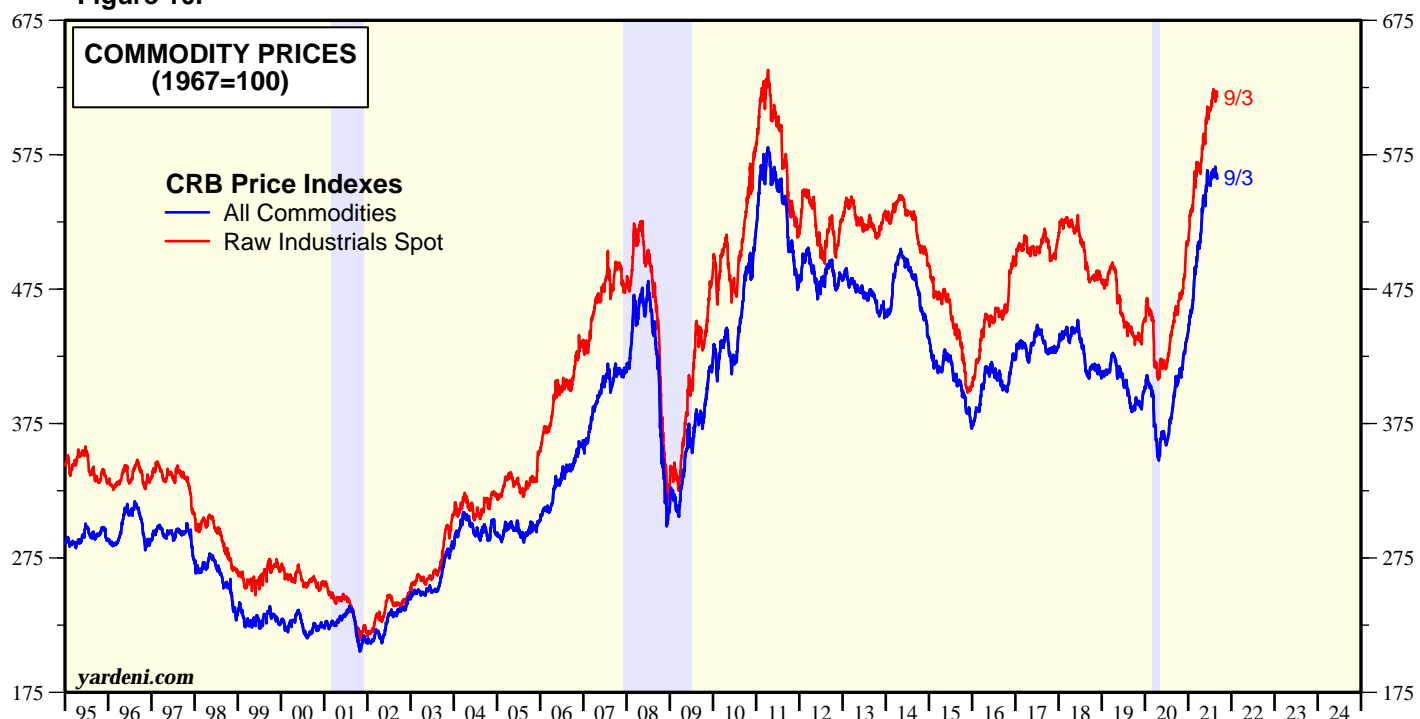
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Bureau of Economic Analysis.

Figure 9.



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

Figure 10.



Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Haver Analytics.

Figure 11.

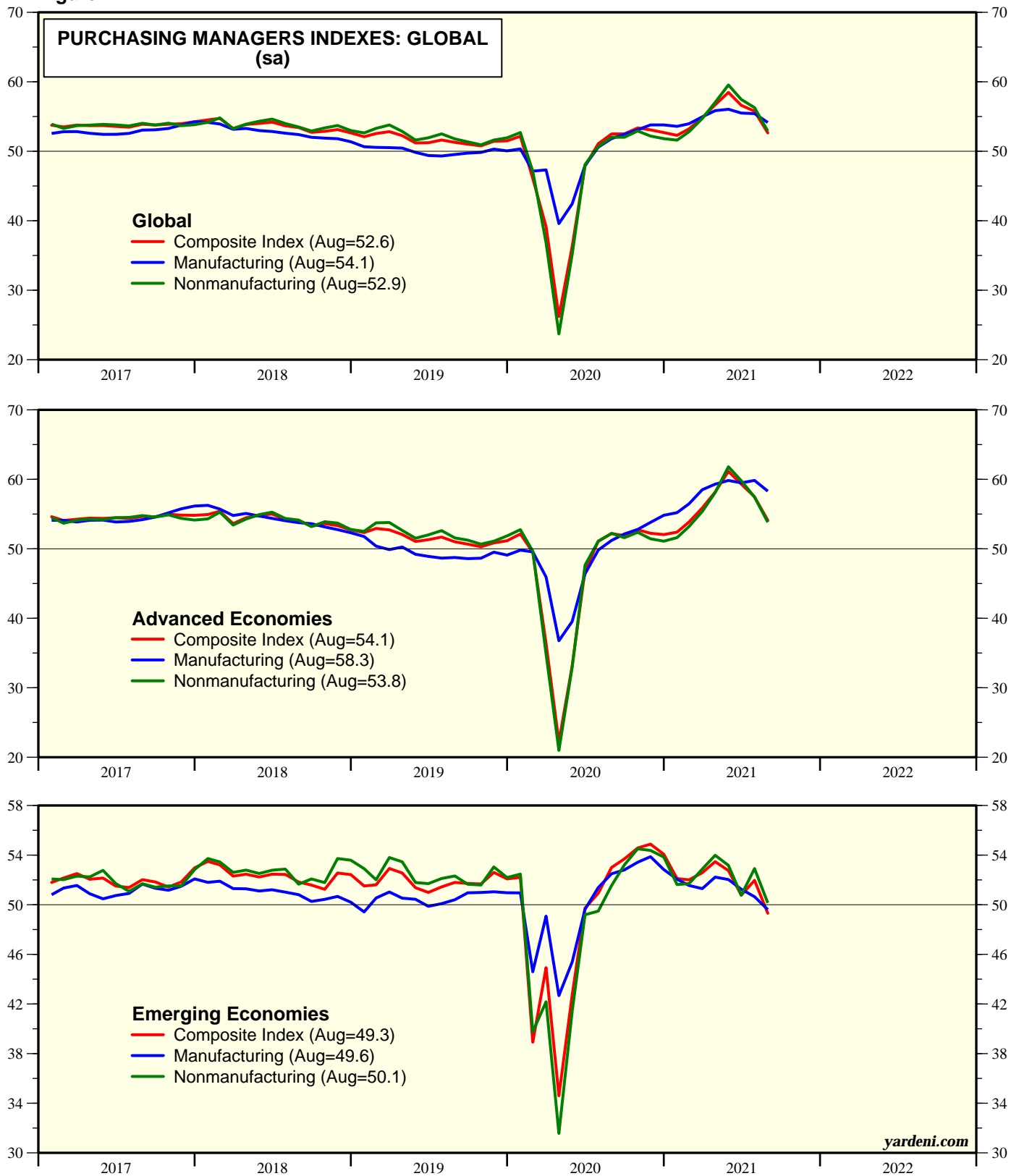
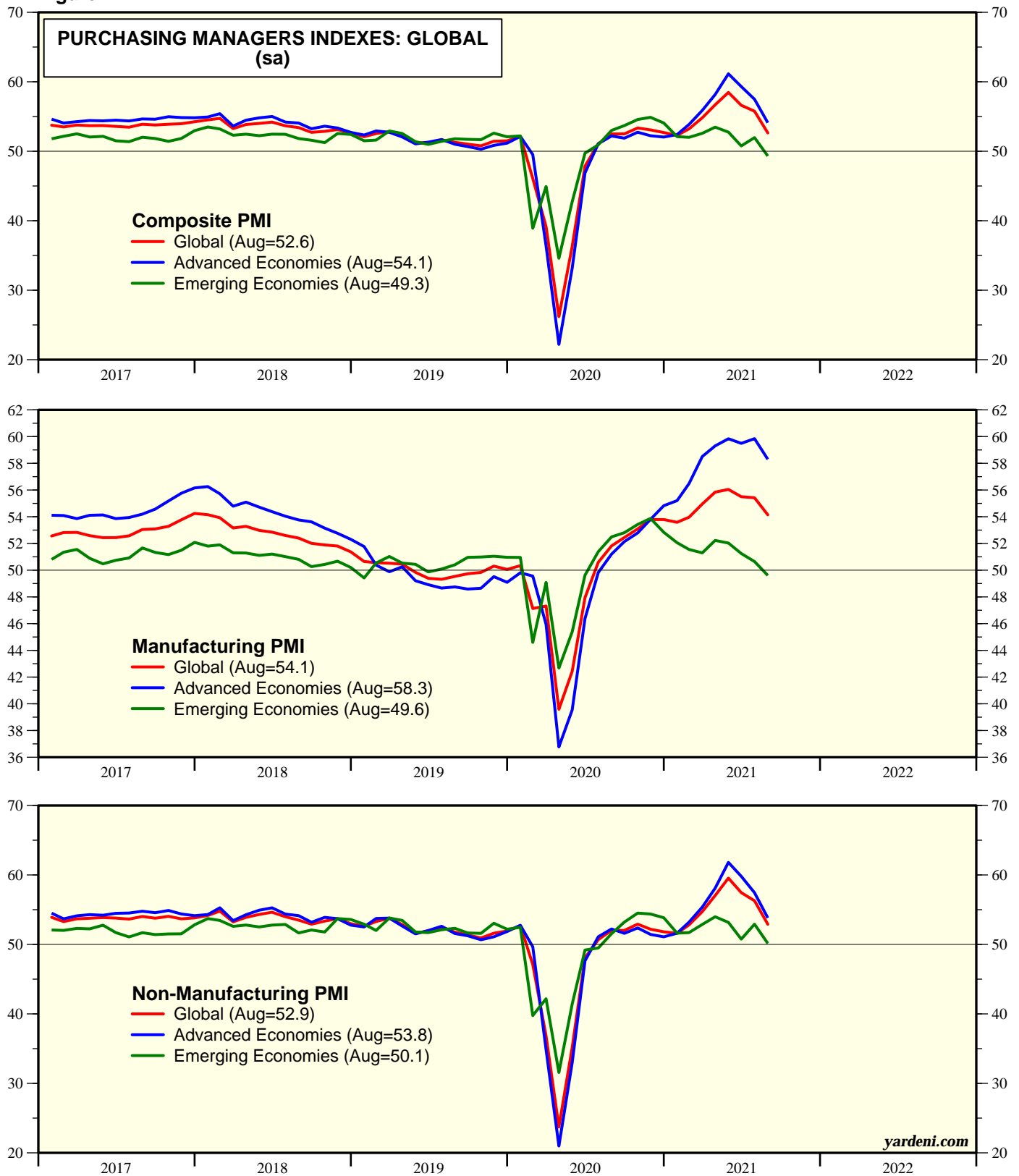
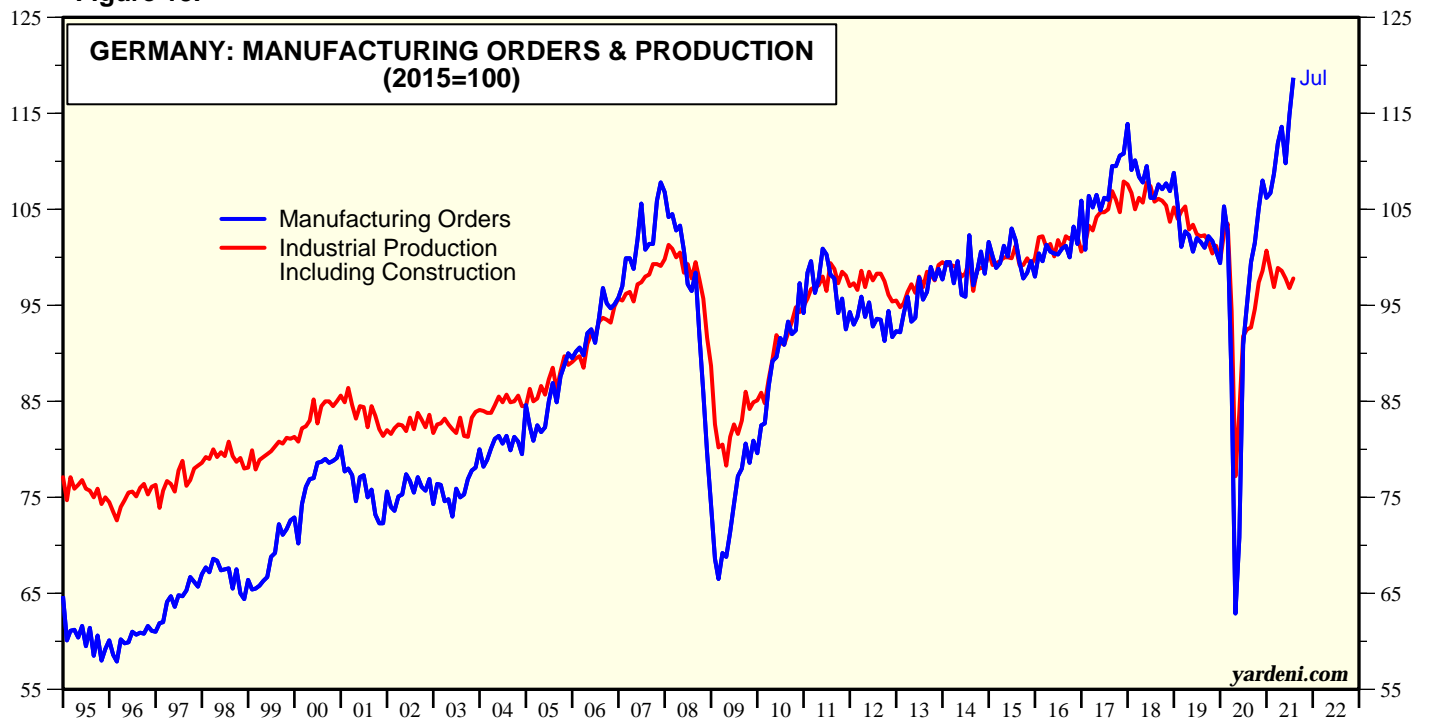


Figure 12.



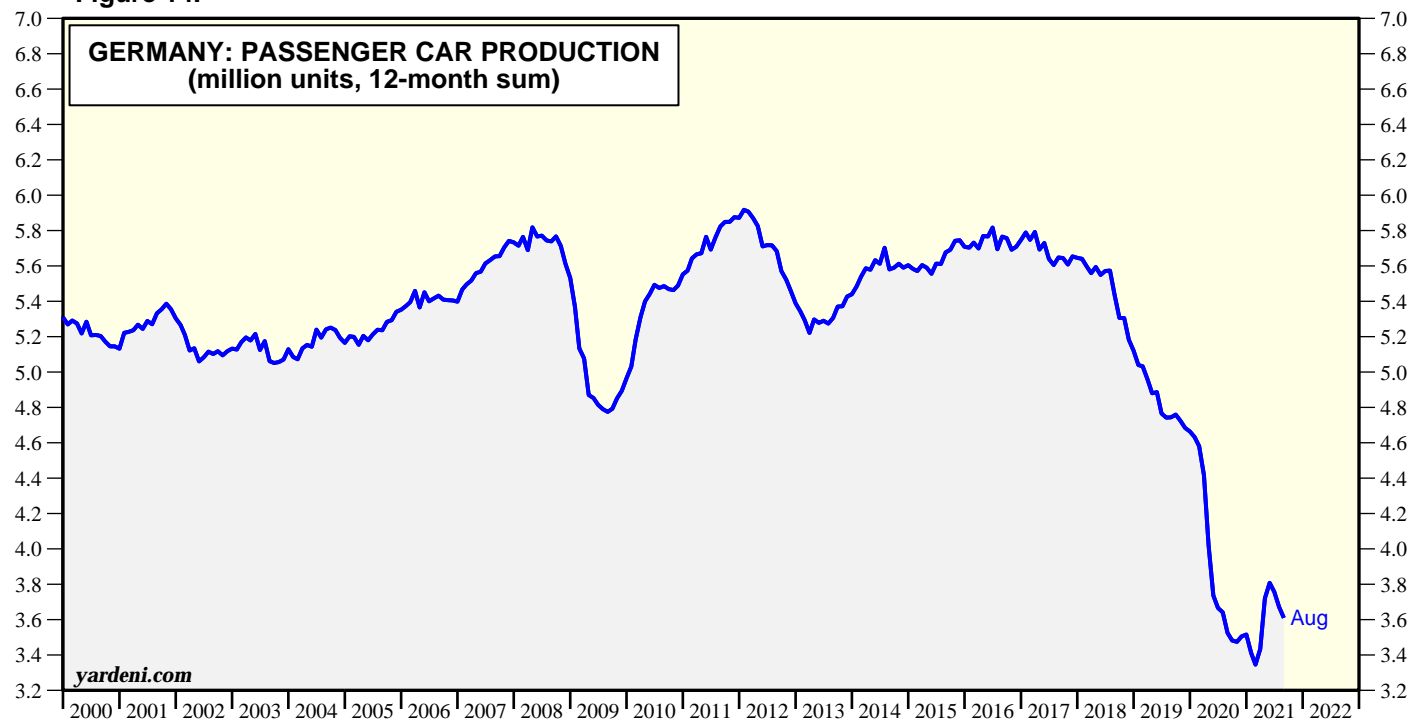
Source: JP Morgan, Markit, and Haver Analytics.

Figure 13.



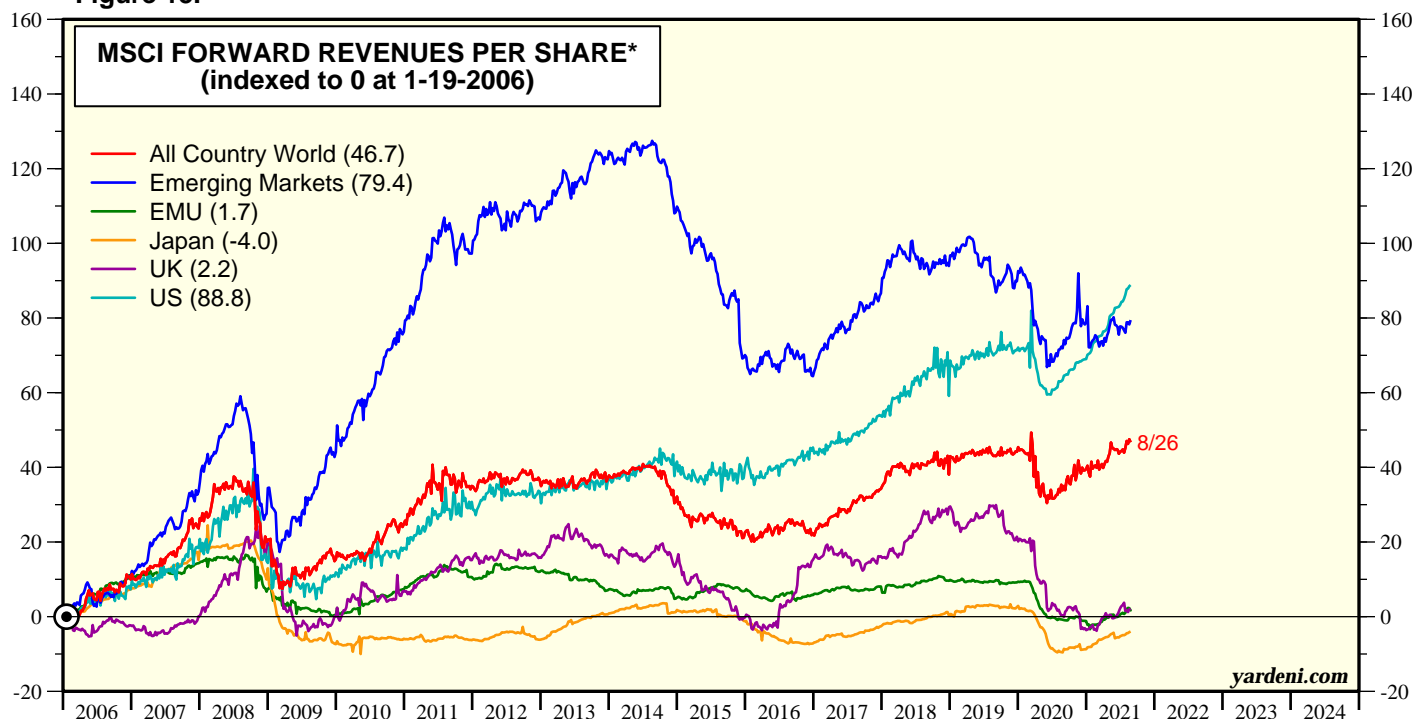
Source: Haver Analytics.

Figure 14.



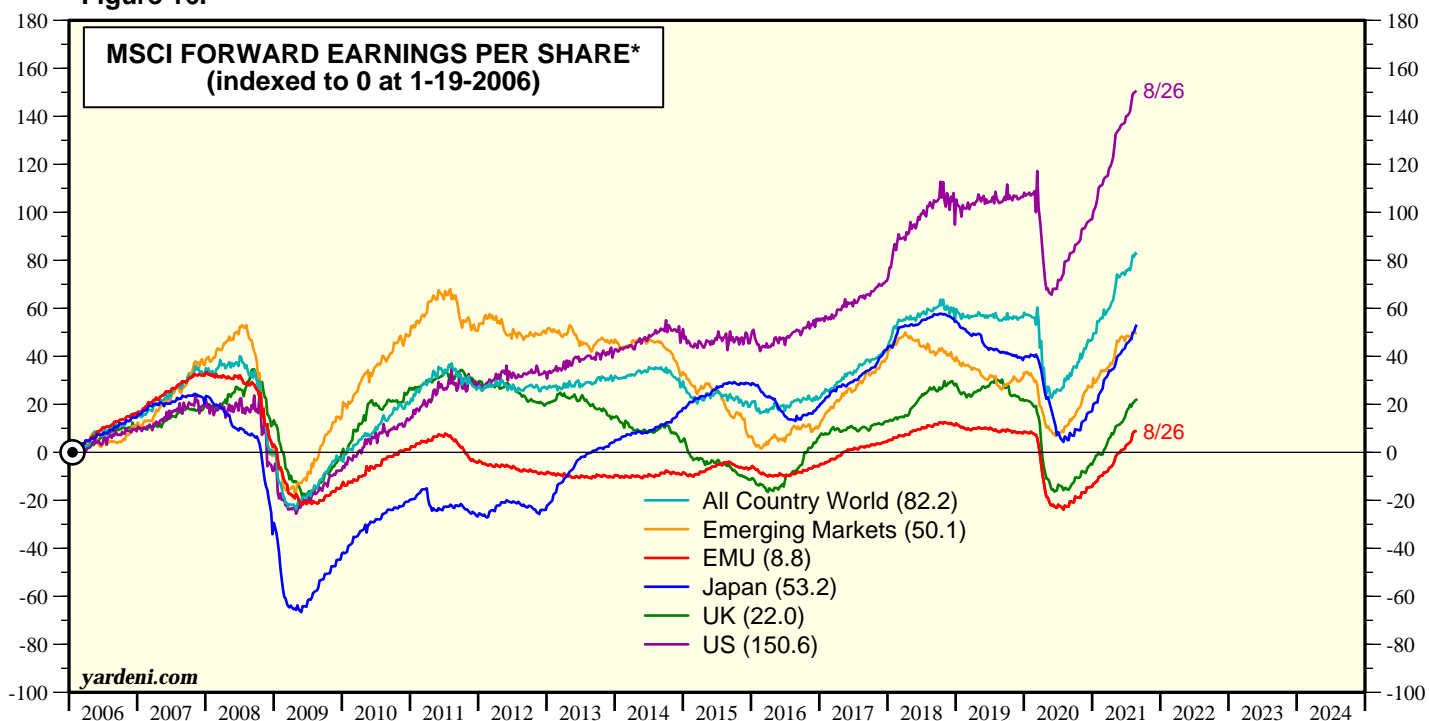
Source: Verband der automobilindustrie.

Figure 15.



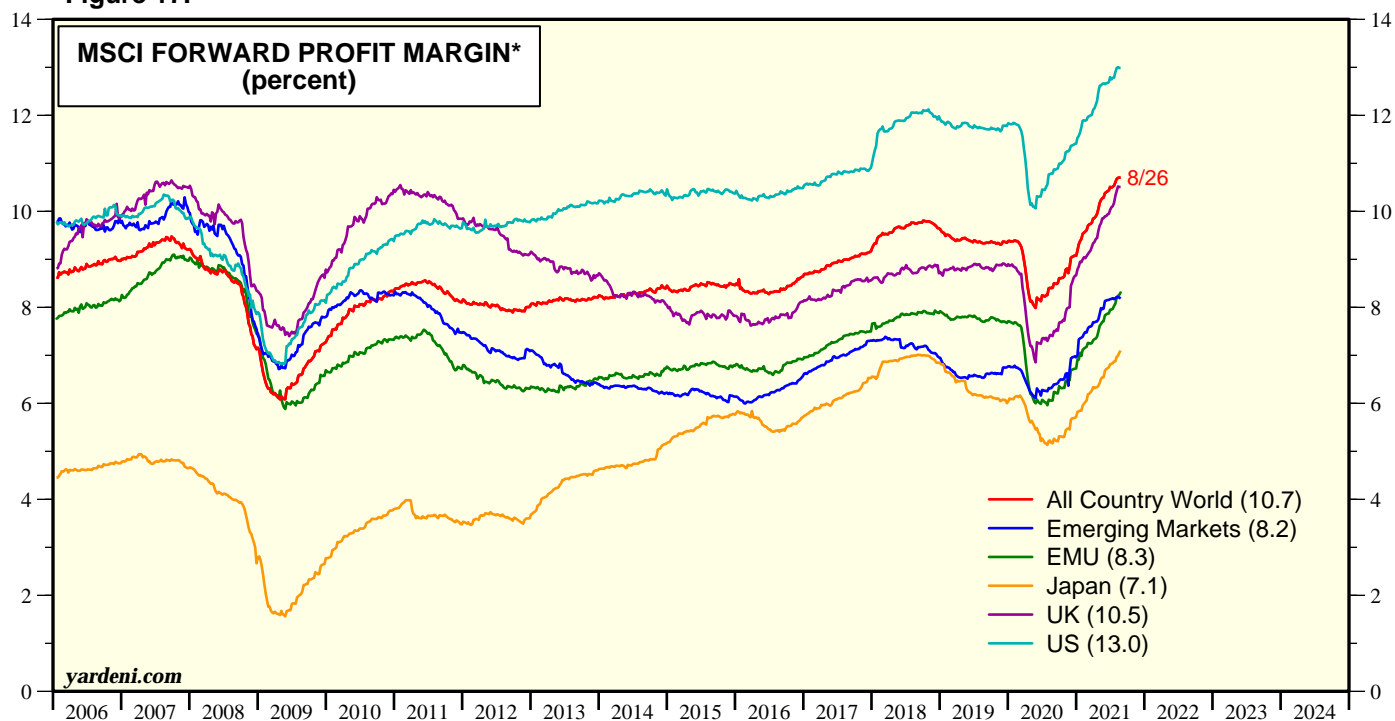
* All MSCI regions in US\$ except EMU in euros. All MSCI countries in local currency except Peru and Russia in US\$.
Source: I/B/E/S data by Refinitiv.

Figure 16.



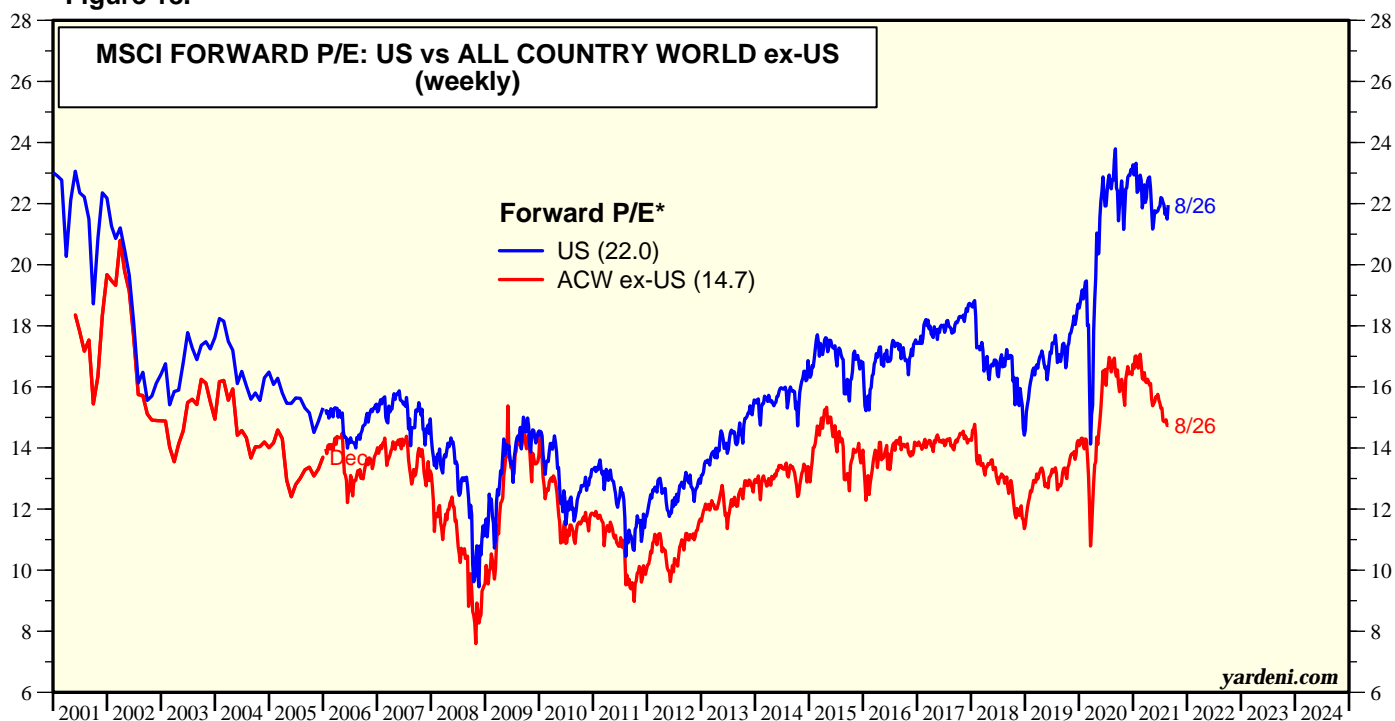
* All MSCI regions in US\$ except EMU in euros. All MSCI countries in local currency except Peru and Russia in US\$.
Source: I/B/E/S data by Refinitiv.

Figure 17.



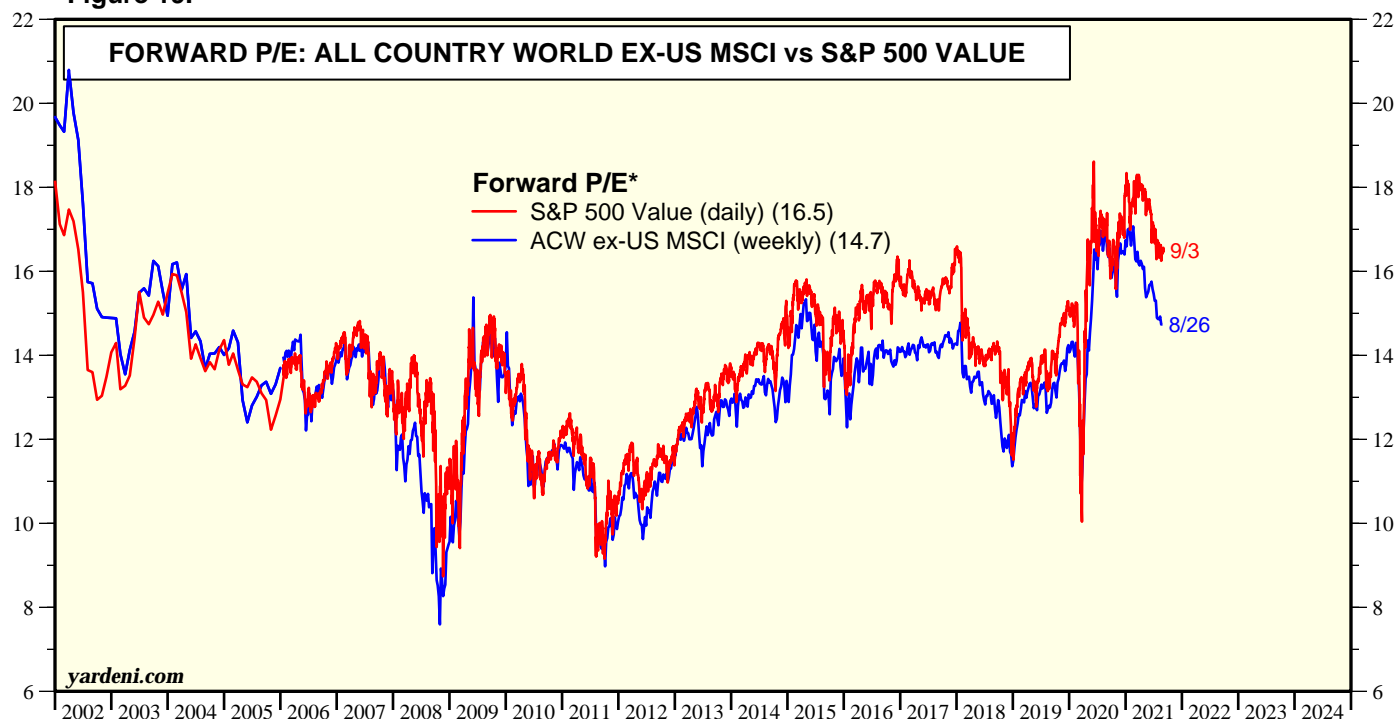
* All MSCI regions in US\$ except EMU in euros. All MSCI countries in local currency except Peru and Russia in US\$.
Source: I/B/E/S data by Refinitiv.

Figure 18.



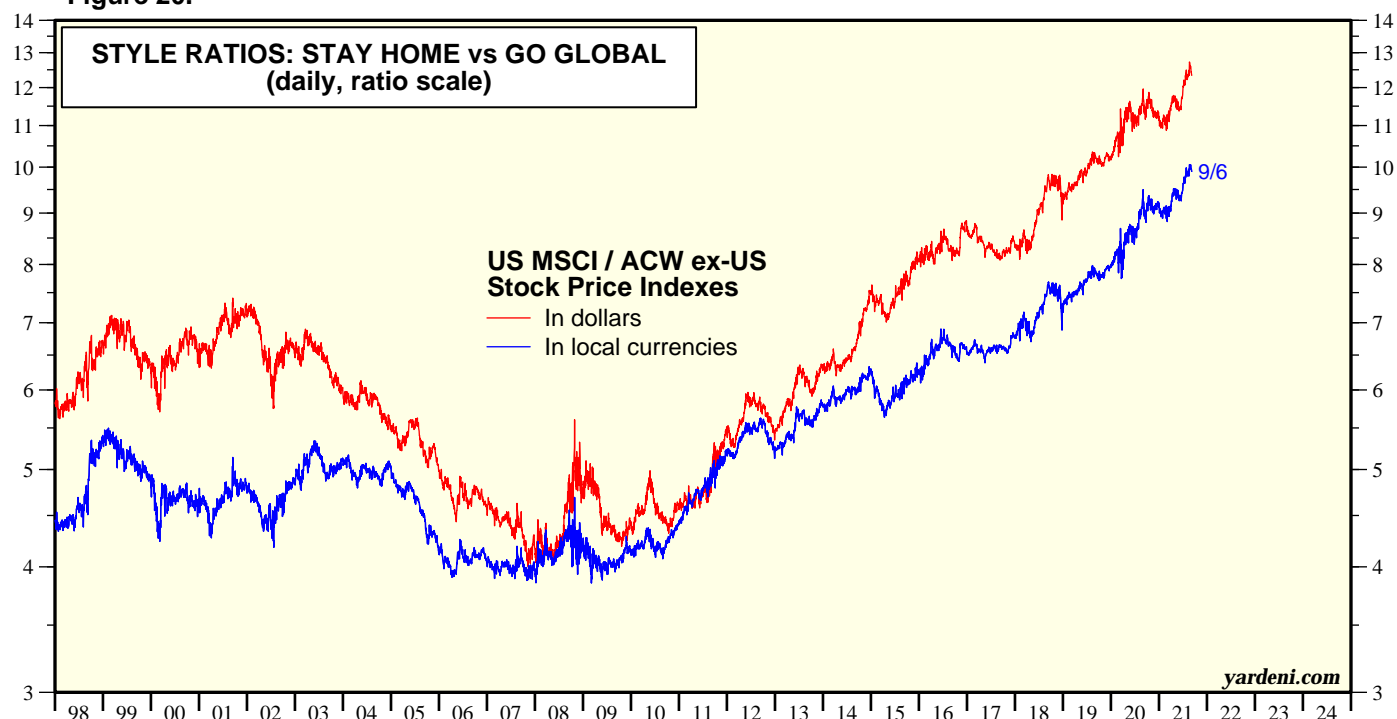
* Price divided by 12-month forward consensus expected operating earnings per share. Monthly through December 2005, then weekly.
Source: MSCI.

Figure 19.



* Price divided by 12-month forward consensus expected operating earnings per share. Monthly through December 2005, weekly and daily thereafter.
Source: I/B/E/S data by Refinitiv and MSCI.

Figure 20.



Source: MSCI.

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