

Chart Collection for Morning Briefing

Yardeni Research, Inc.

November 4, 2021

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516-972-7683

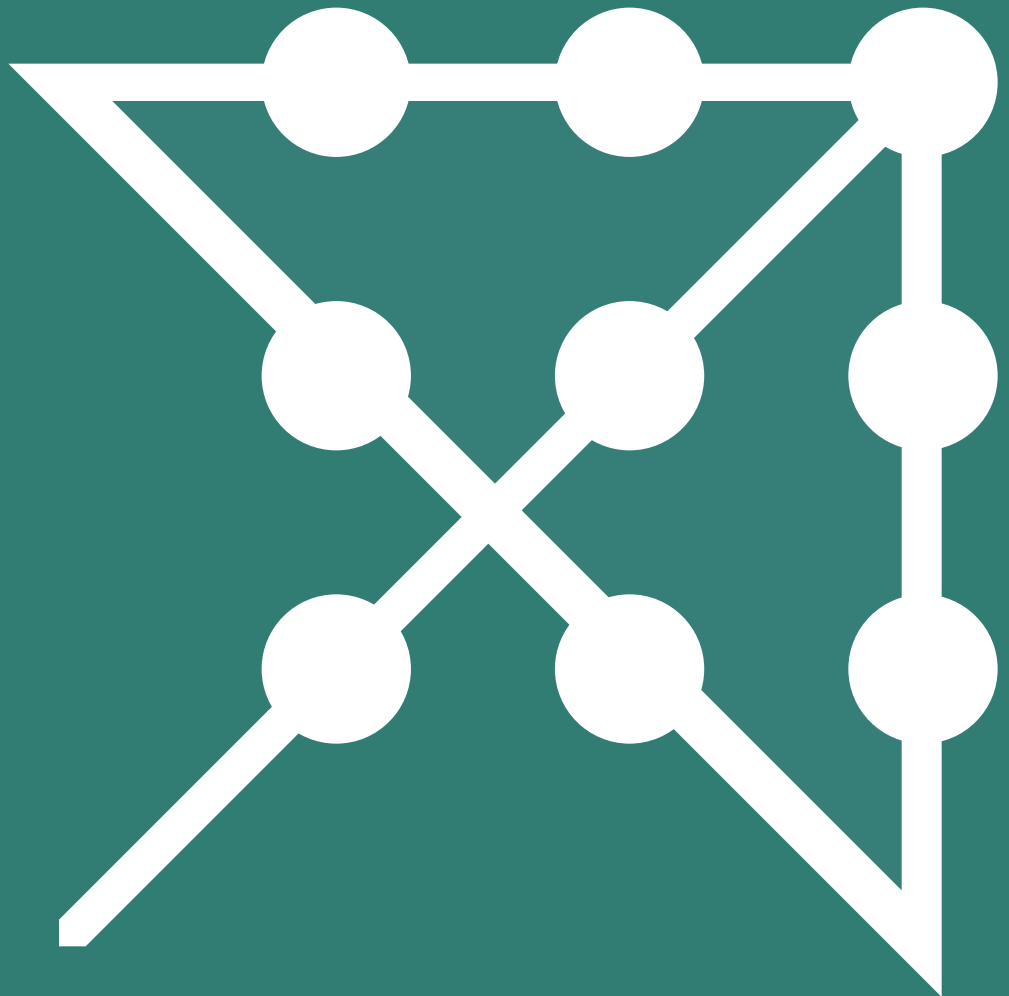
eyardeni@yardeni.com

Mali Quintana

480-664-1333

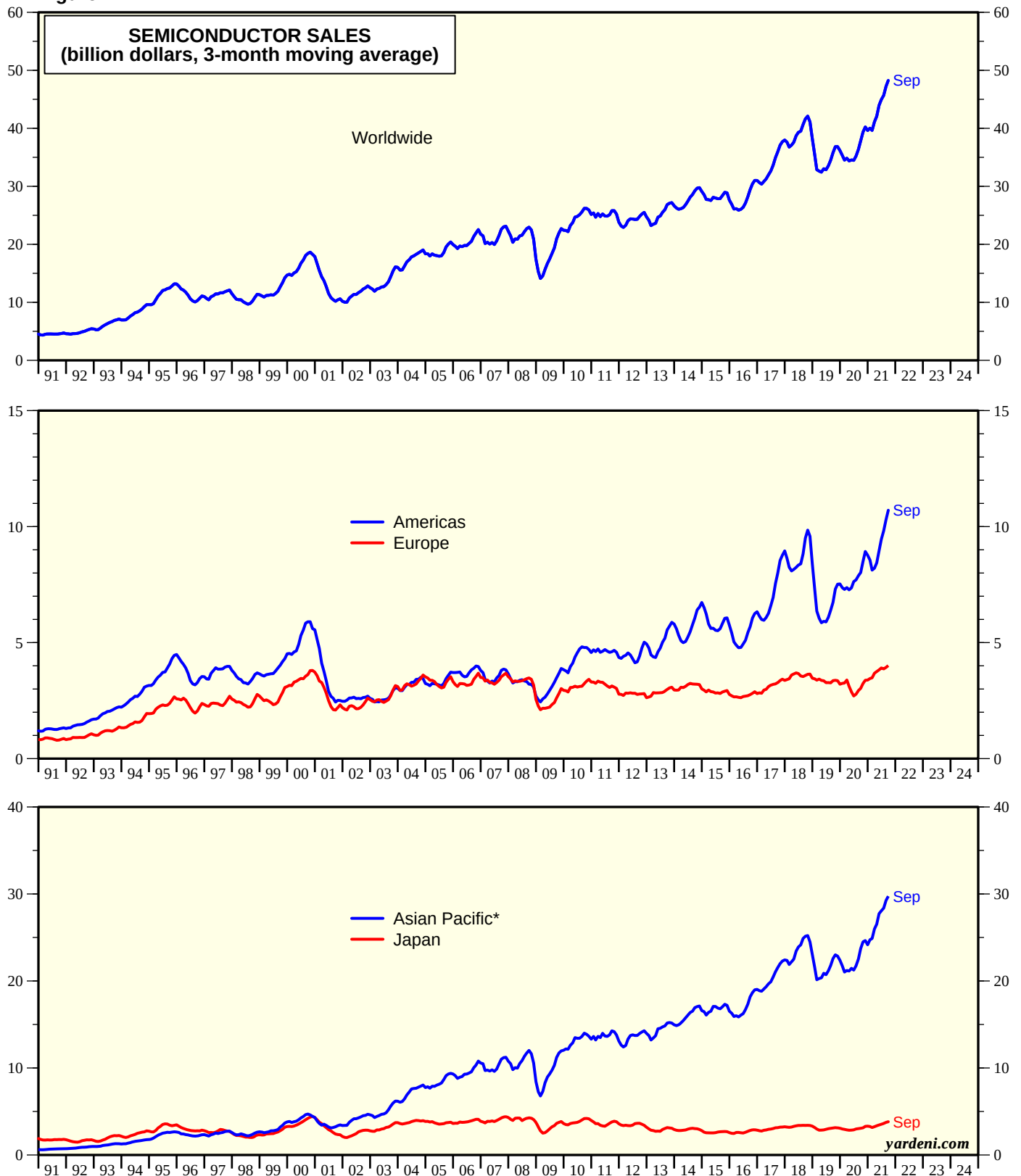
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thinking outside the box

Figure 1.



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

Figure 2.

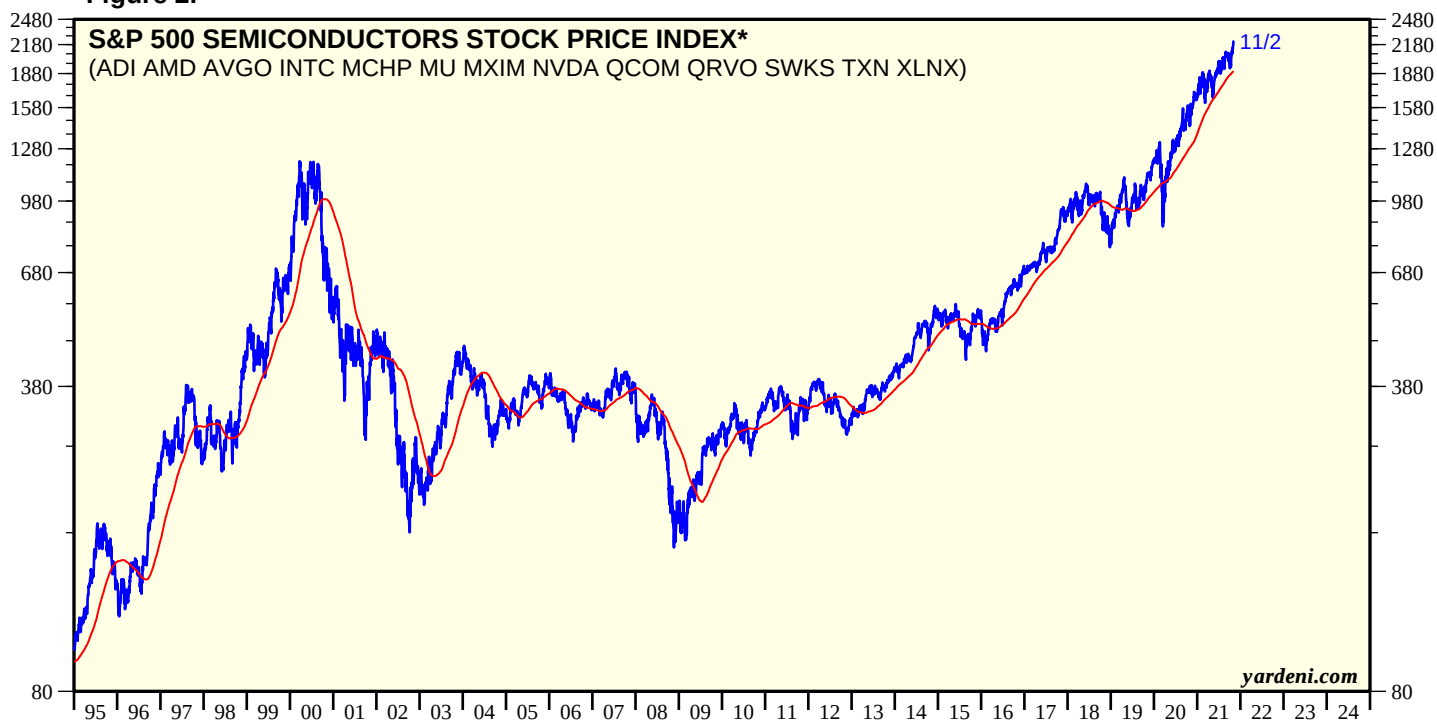


Figure 3.

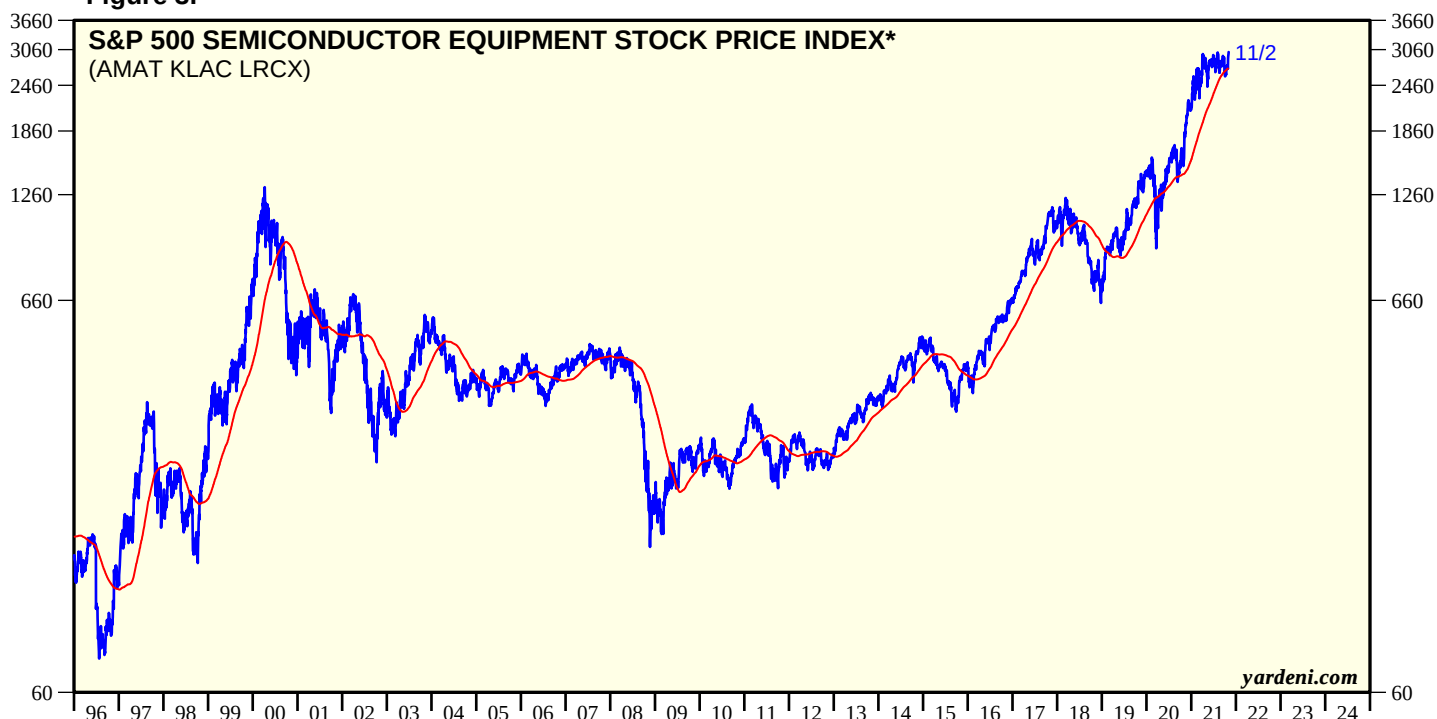
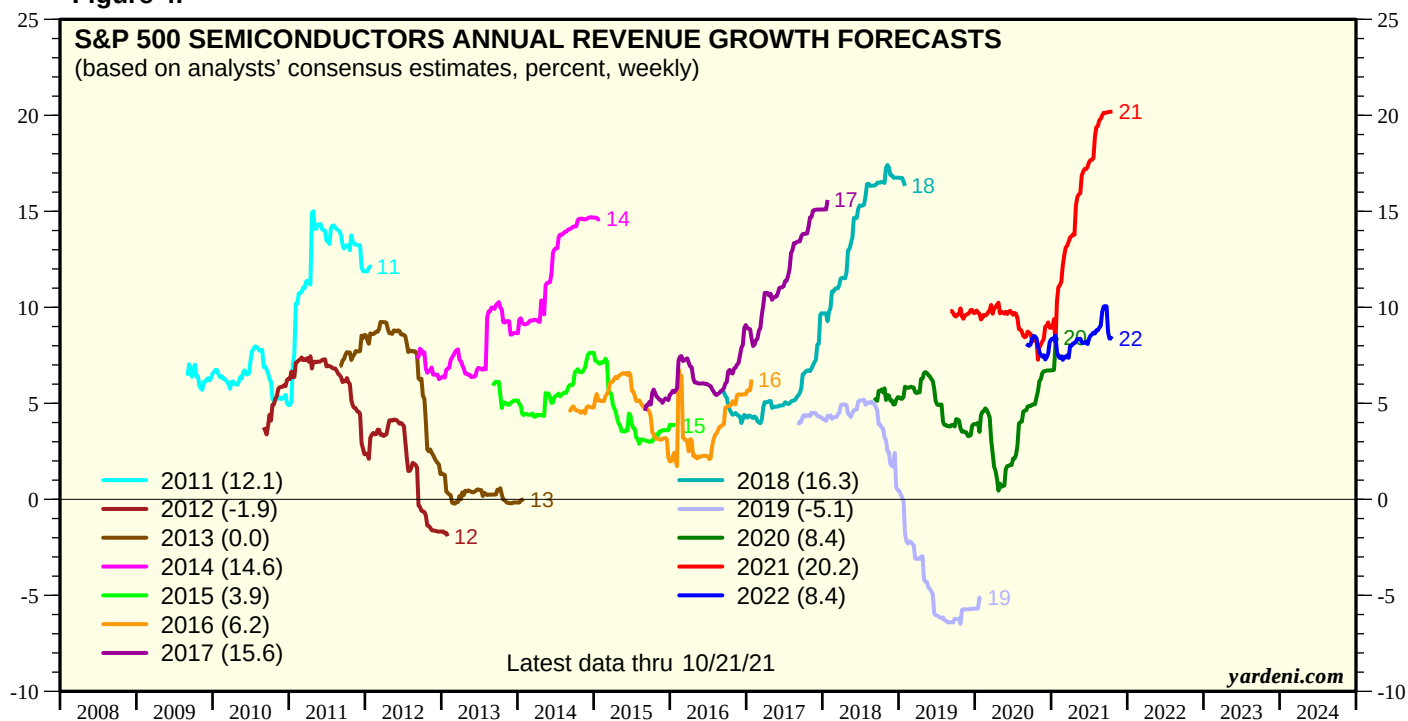
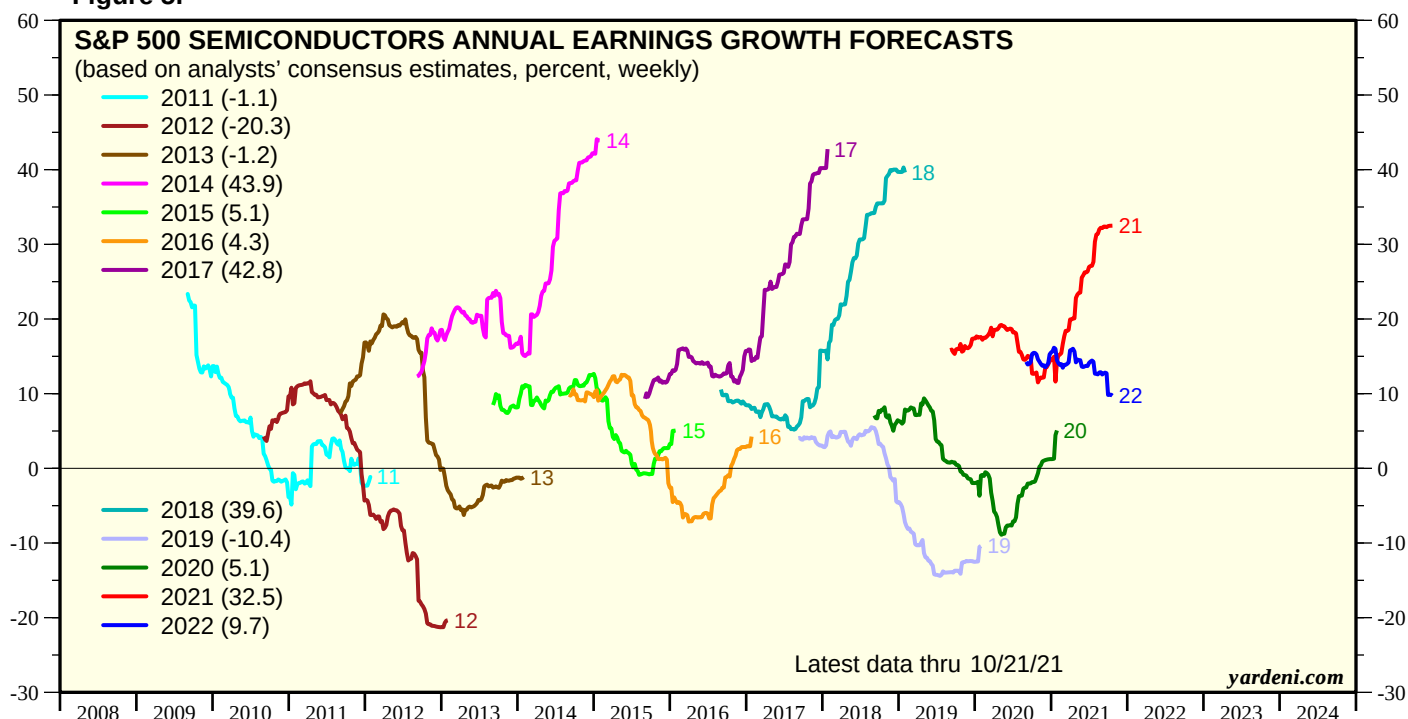


Figure 4.



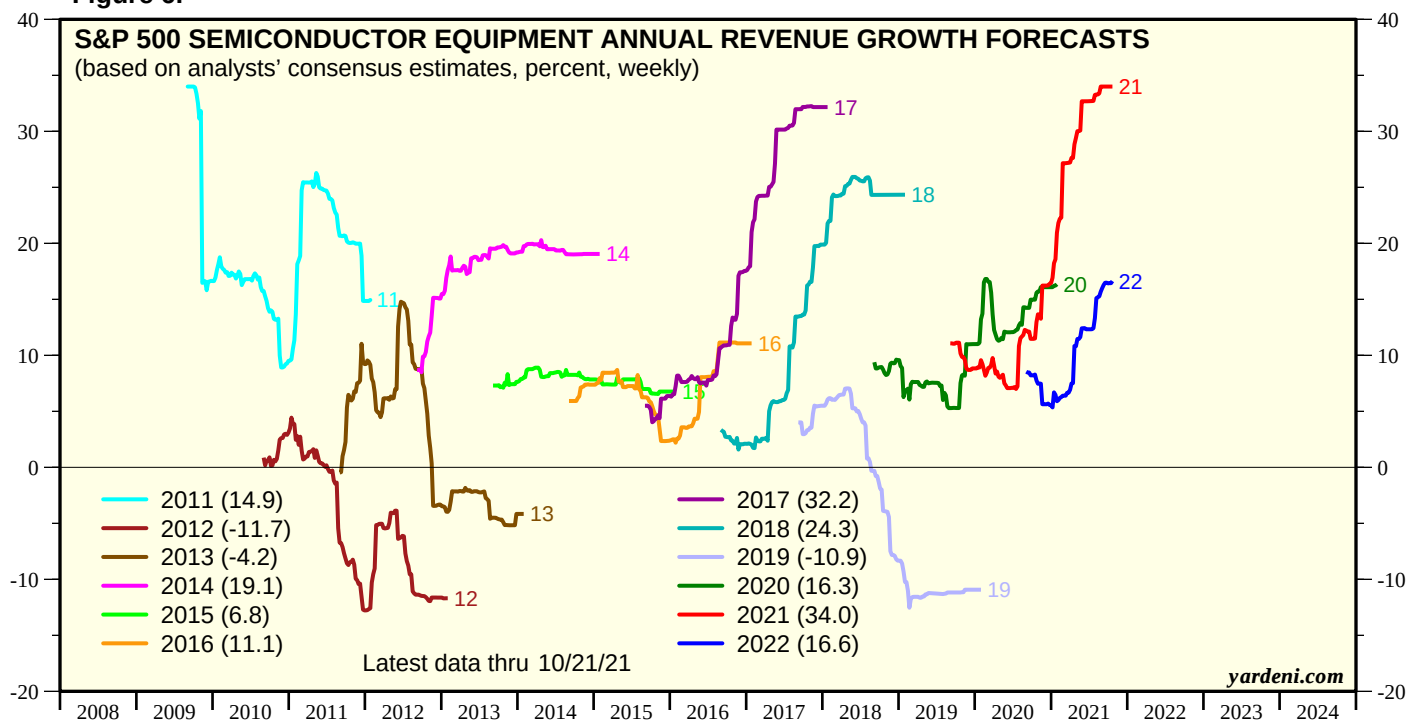
Source: I/B/E/S data by Refinitiv.

Figure 5.



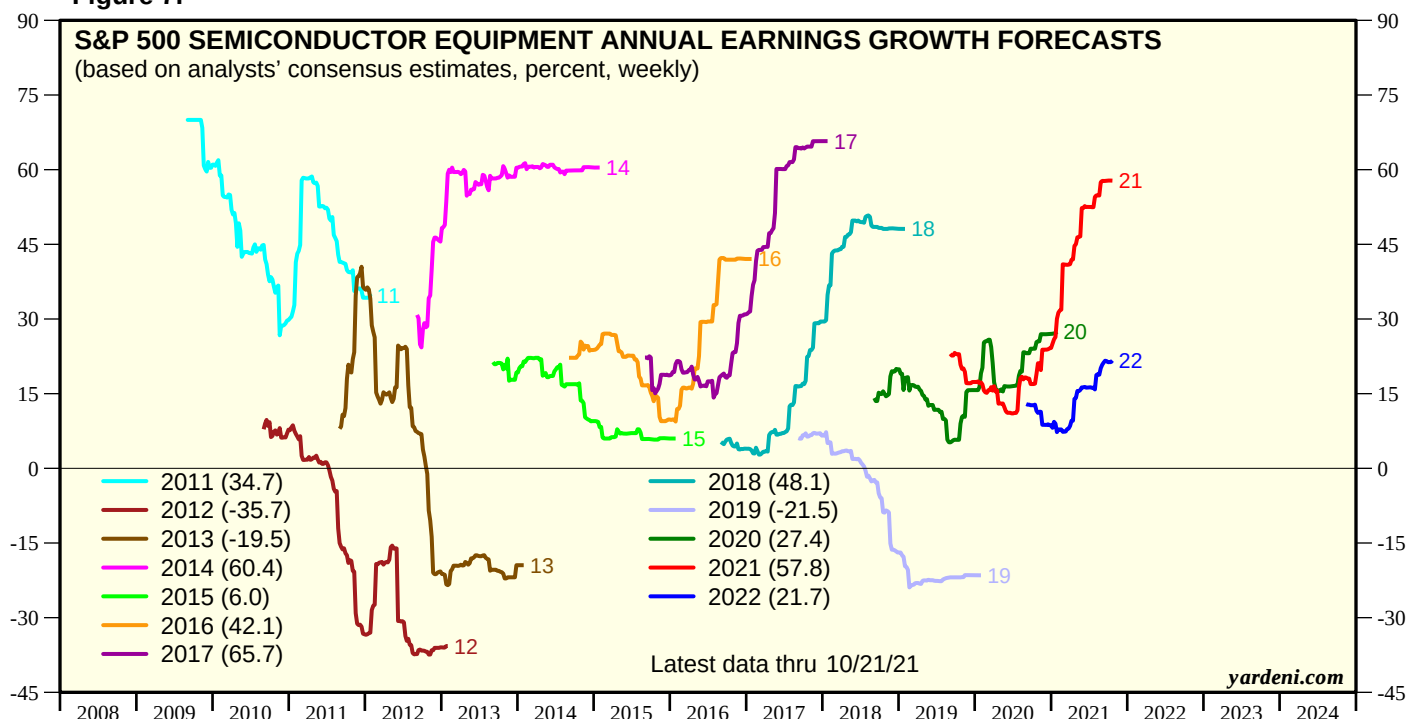
Source: I/B/E/S data by Refinitiv.

Figure 6.



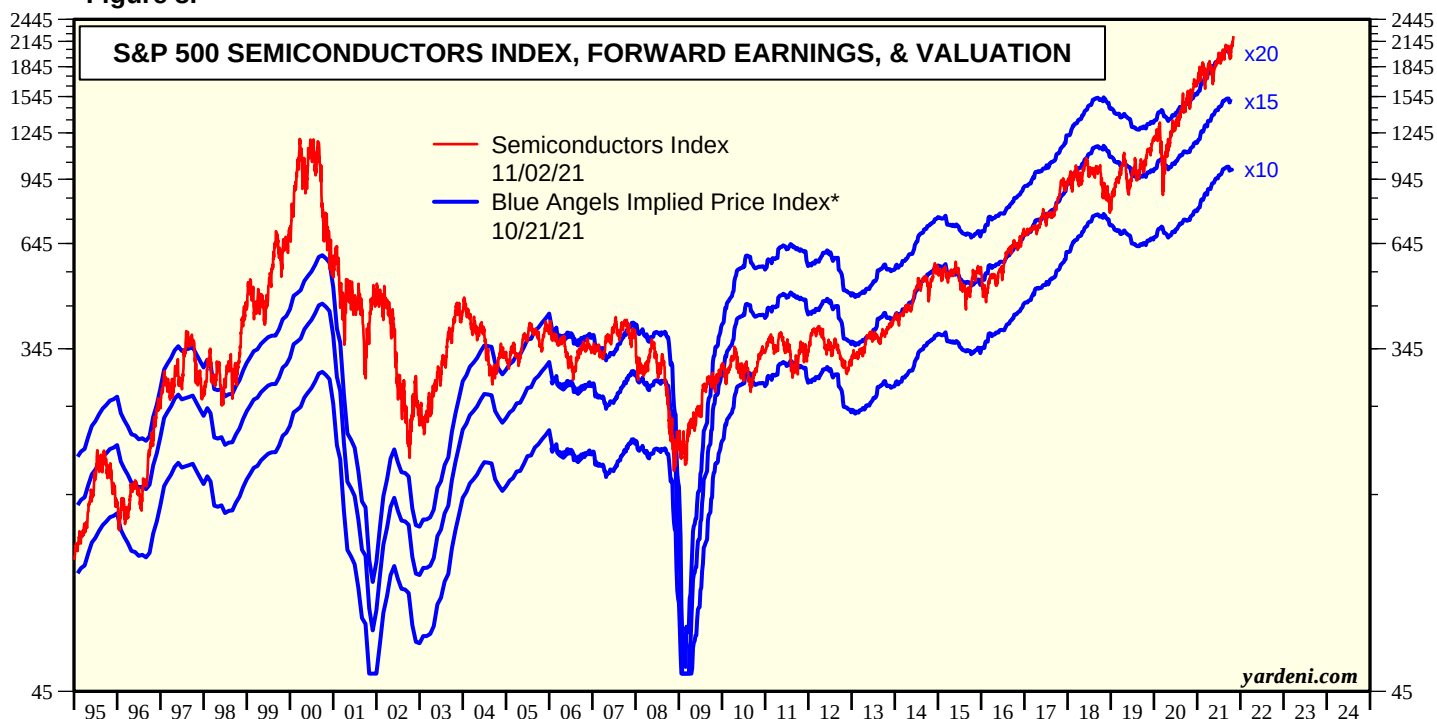
Source: I/B/E/S data by Refinitiv.

Figure 7.



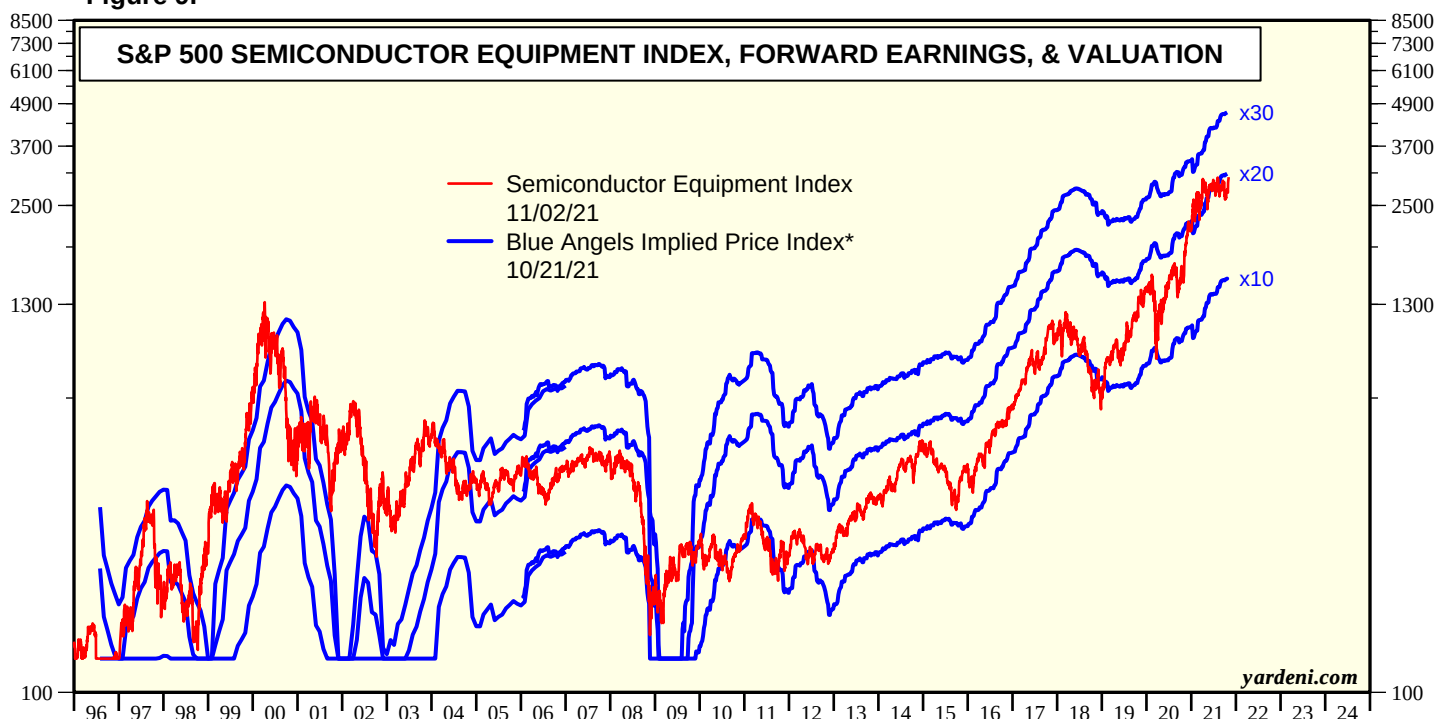
Source: I/B/E/S data by Refinitiv.

Figure 8.



* Implied price index calculated using forward earnings times forward P/Es.
Source: Standard & Poor's and I/B/E/S data by Refinitiv.

Figure 9.



* Implied price index calculated using forward earnings times forward P/Es.
Source: Standard & Poor's Corporation and I/B/E/S data by Refinitiv.

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