

Chart Collection for Morning Briefing

Yardeni Research, Inc.

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Dr. Edward Yardeni

516-972-7683
eyardeni@yardeni.com

Mali Quintana

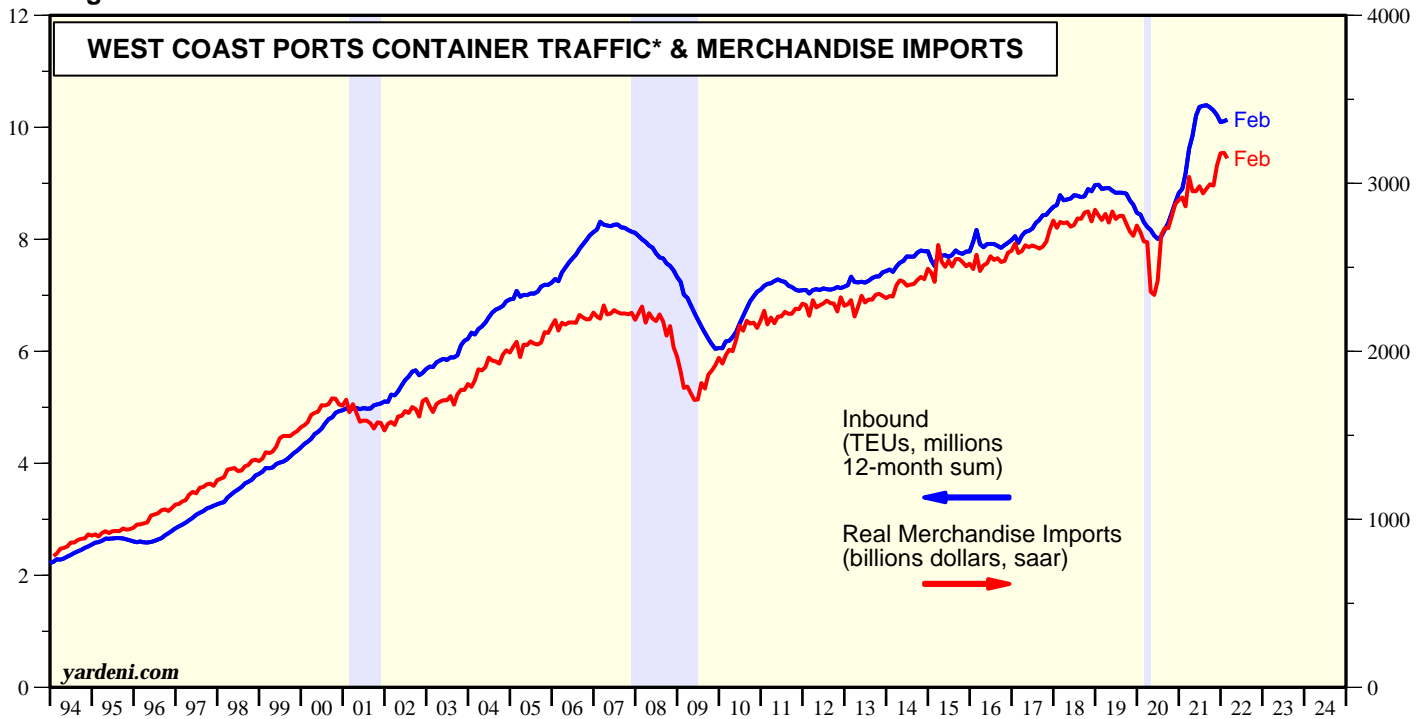
480-664-1333
aquintana@yardeni.com

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thinking outside the box

Figure 1.



* Sum of Port of Los Angeles and Port of Long Beach Loaded Containers. TEUs=20-foot equivalent units.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Ports of Los Angeles and Long Beach and Bureau of Economic Analysis.

Figure 2.



— 200-day moving average.
 Source: Haver Analytics.

Figure 3.

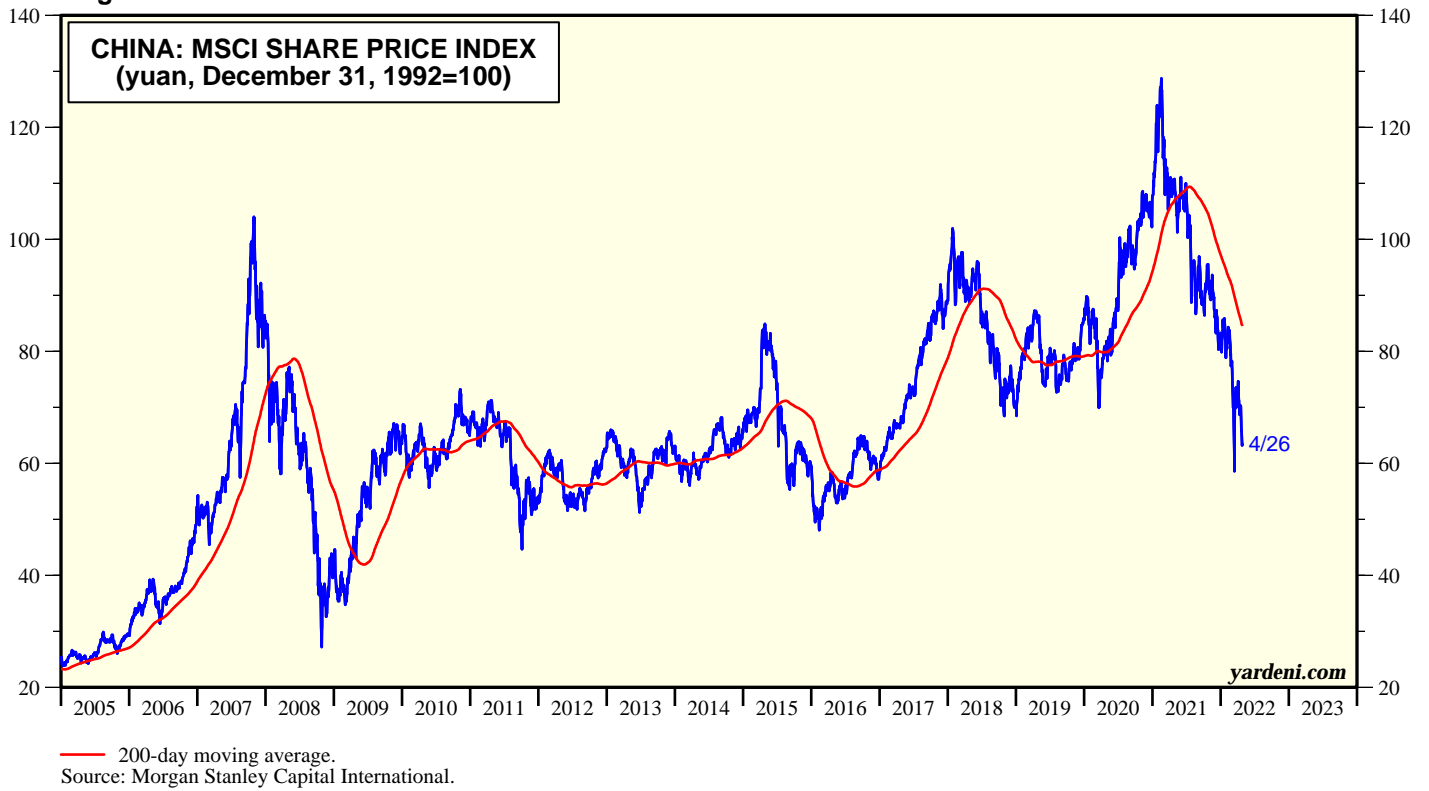


Figure 4.

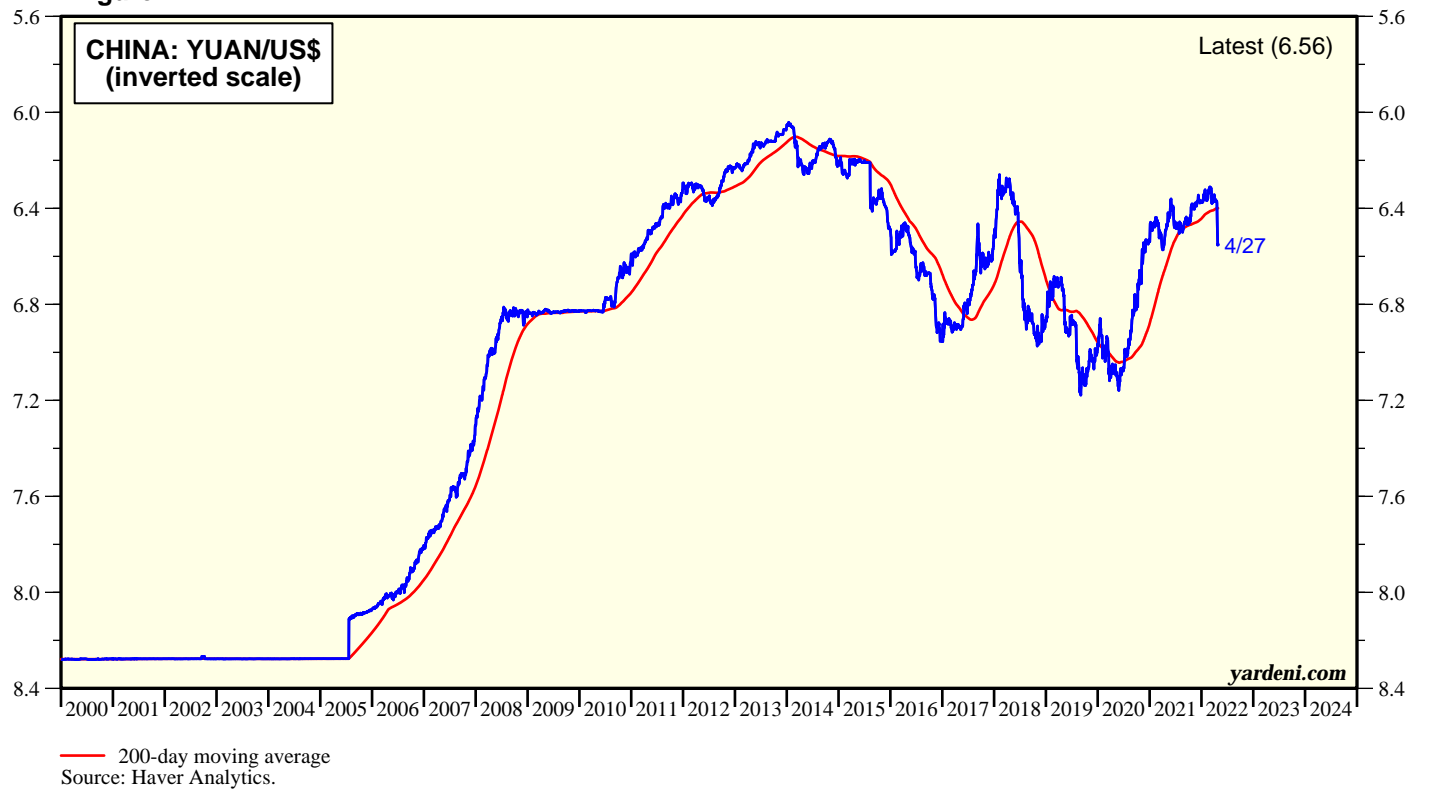


Figure 5.

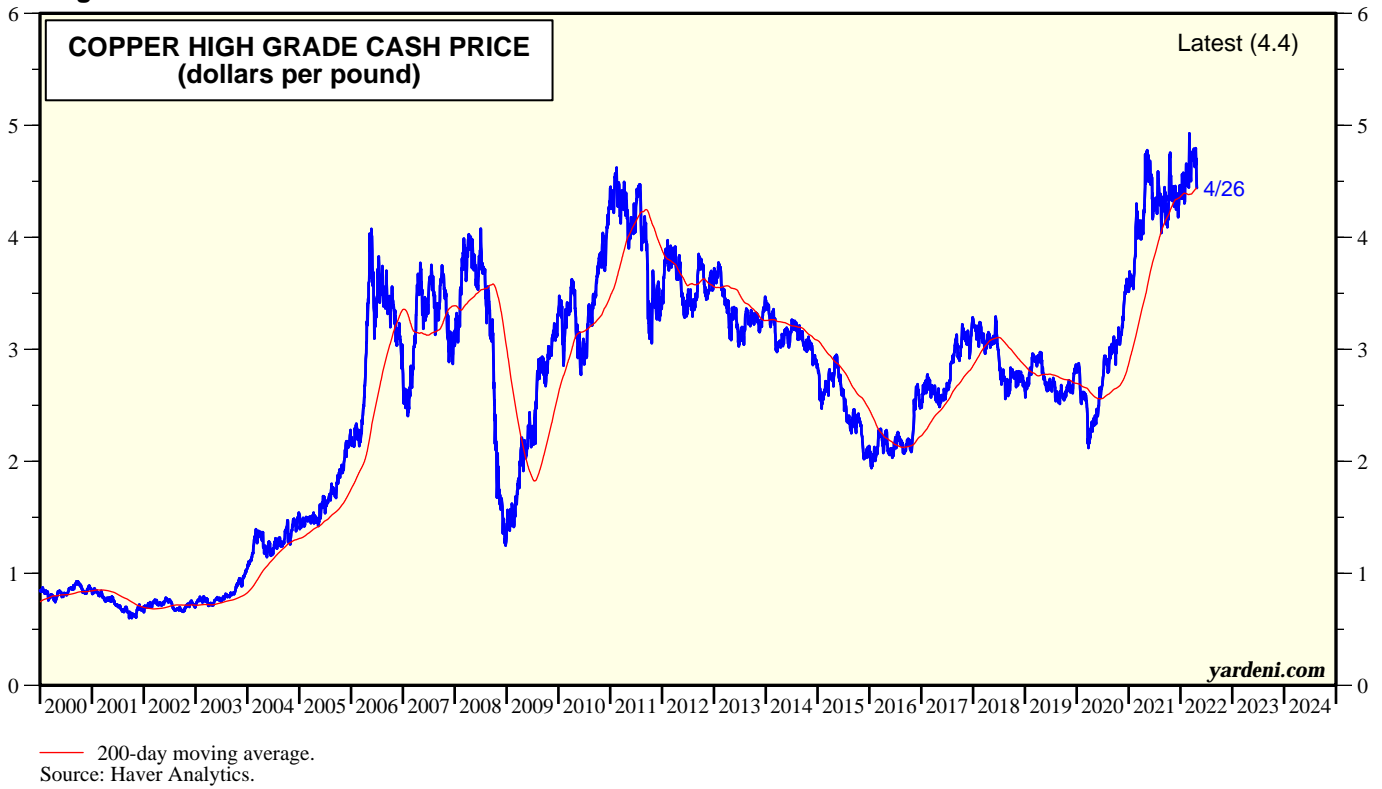


Figure 6.

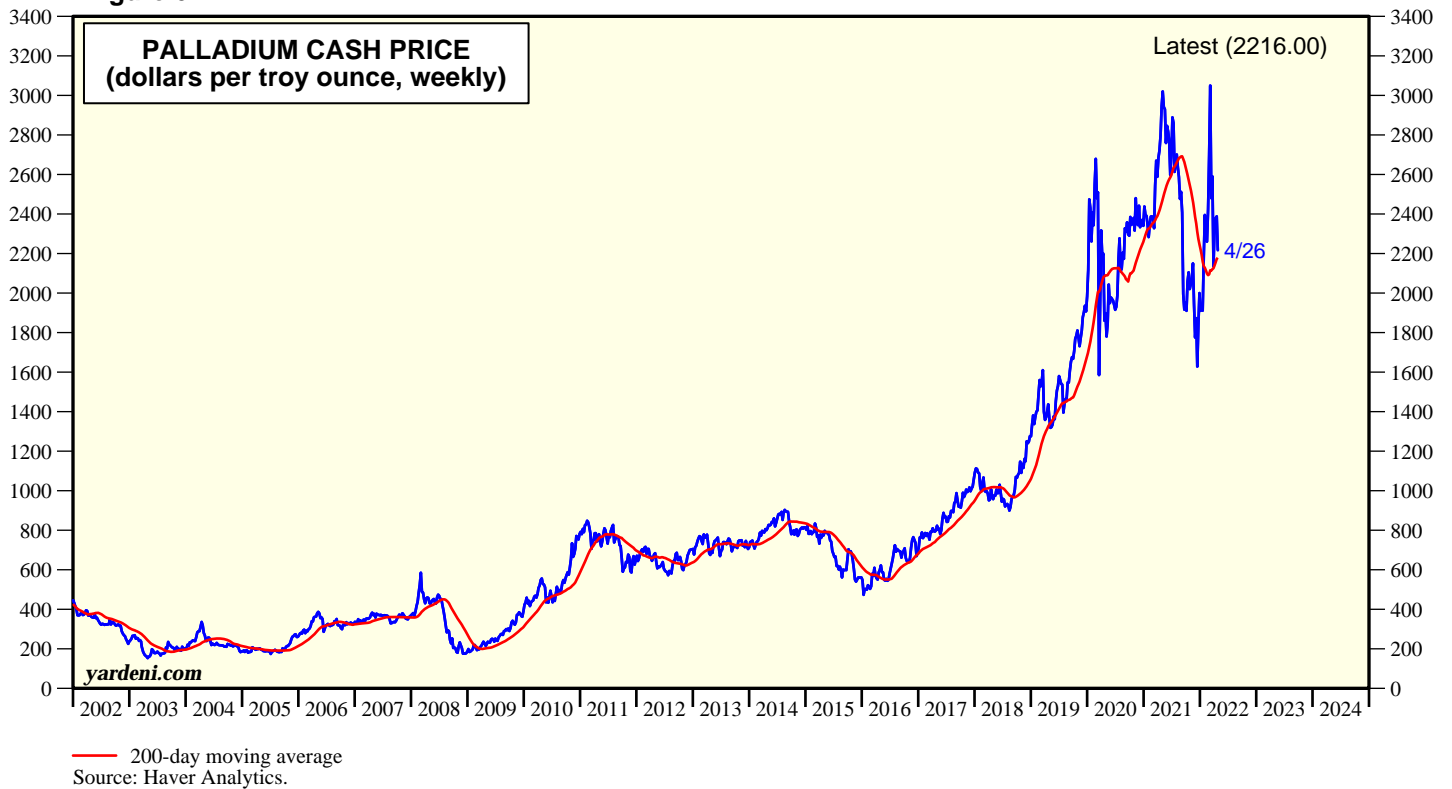
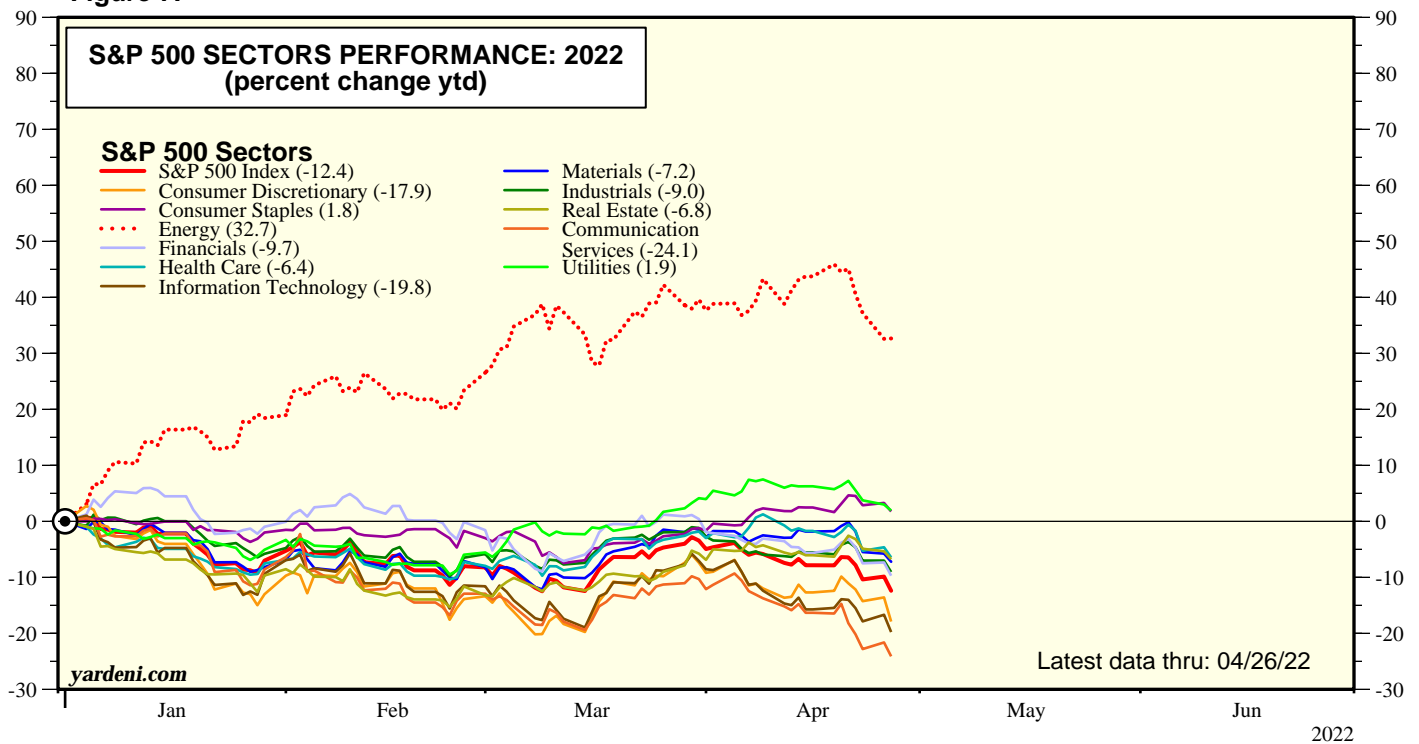
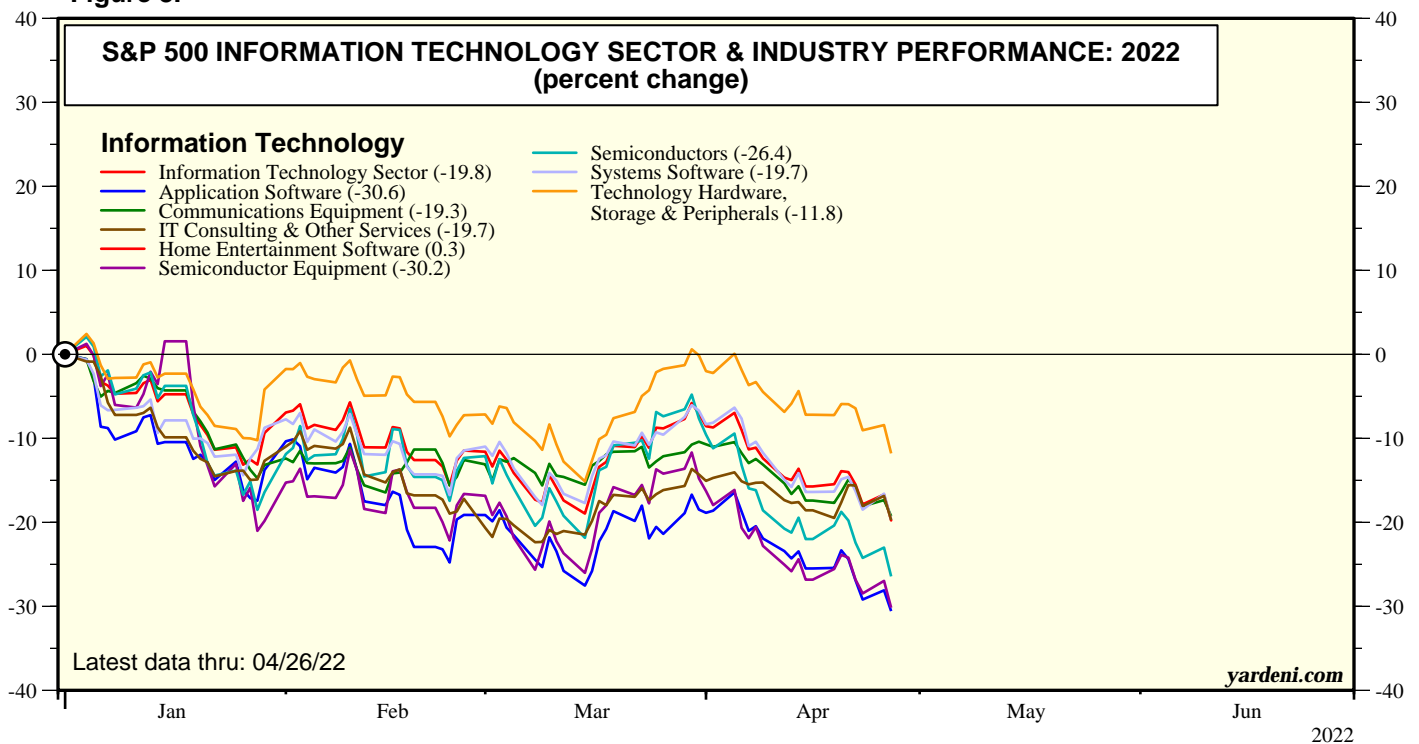


Figure 7.



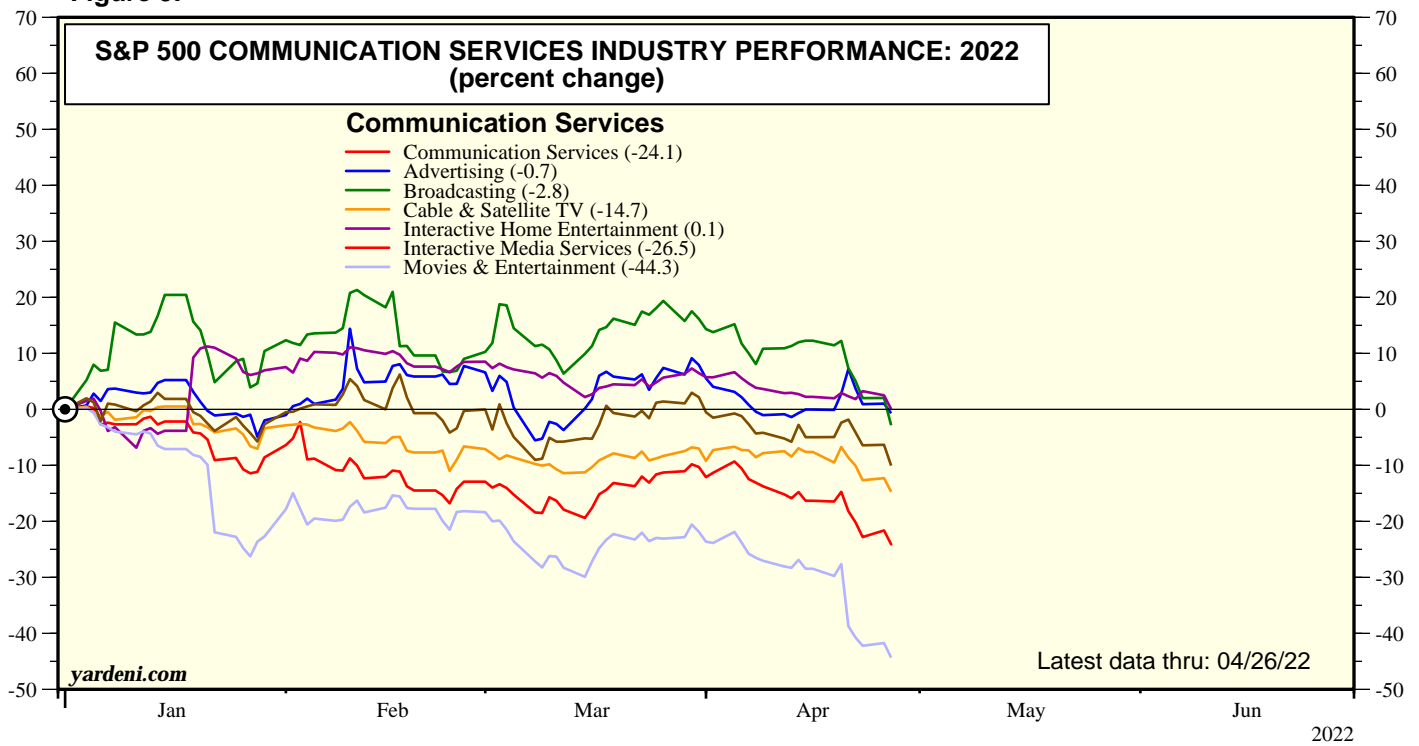
Source: Standard & Poor's.

Figure 8.



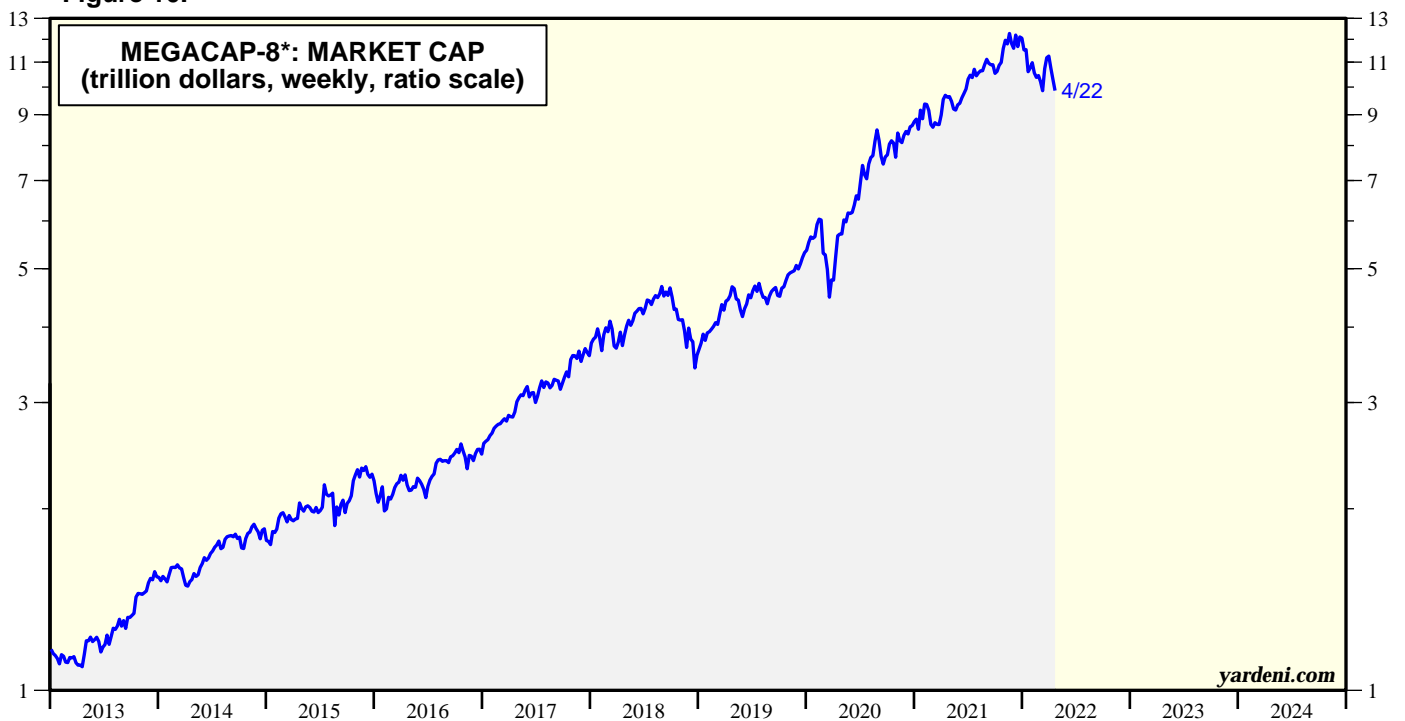
Source: Standard & Poor's.

Figure 9.



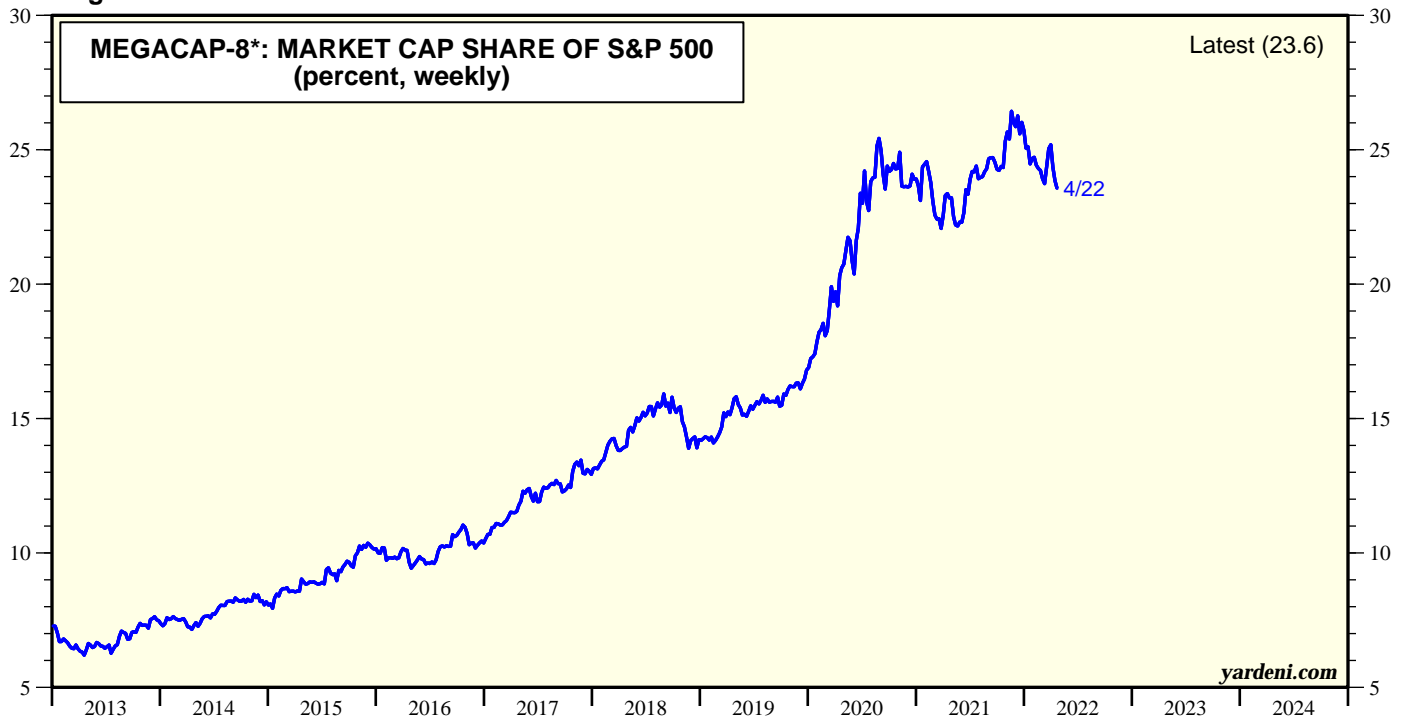
Source: Standard & Poor's.

Figure 10.



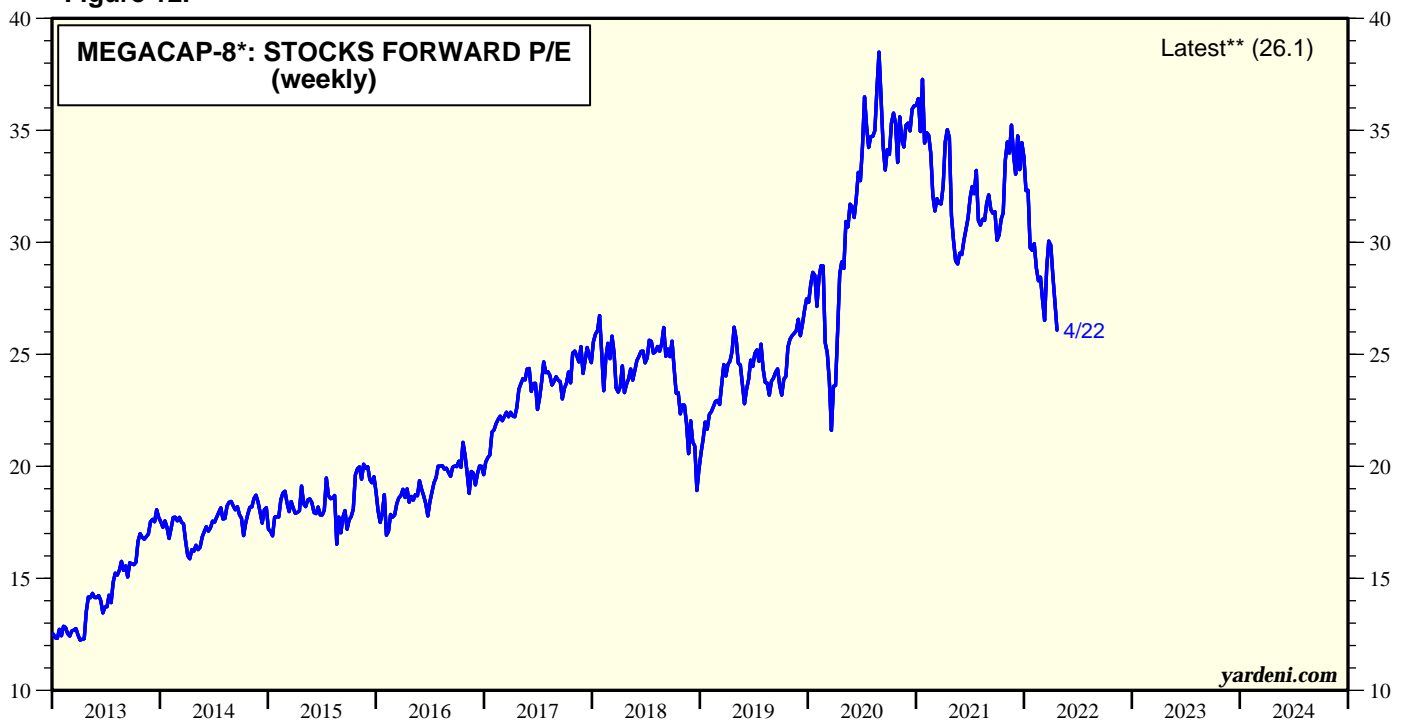
* MegaCap-8 stocks include Alphabet, Amazon, Apple, Meta, Microsoft, Netflix, NVIDIA, and Tesla. Both classes of Alphabet are included.
Source: Standard & Poor's and I/B/E/S data by Refinitiv.

Figure 11.



* MegaCap-8 stocks include Alphabet, Amazon, Apple, Meta, Microsoft, Netflix, NVIDIA, and Tesla. Both classes of Alphabet are included
Source: Standard & Poor's and I/B/E/S data by Refinitiv.

Figure 12.



* MegaCap-8 stocks include Alphabet, Amazon, Apple, Meta, Microsoft, Netflix, NVIDIA, and Tesla. Both classes of Alphabet are included.
** Market cap divided by aggregate forward consensus expected operating earnings.
Source: I/B/E/S data by Refinitiv.

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