

Chart Collection for Morning Briefing

Yardeni Research, Inc.

July 27, 2022

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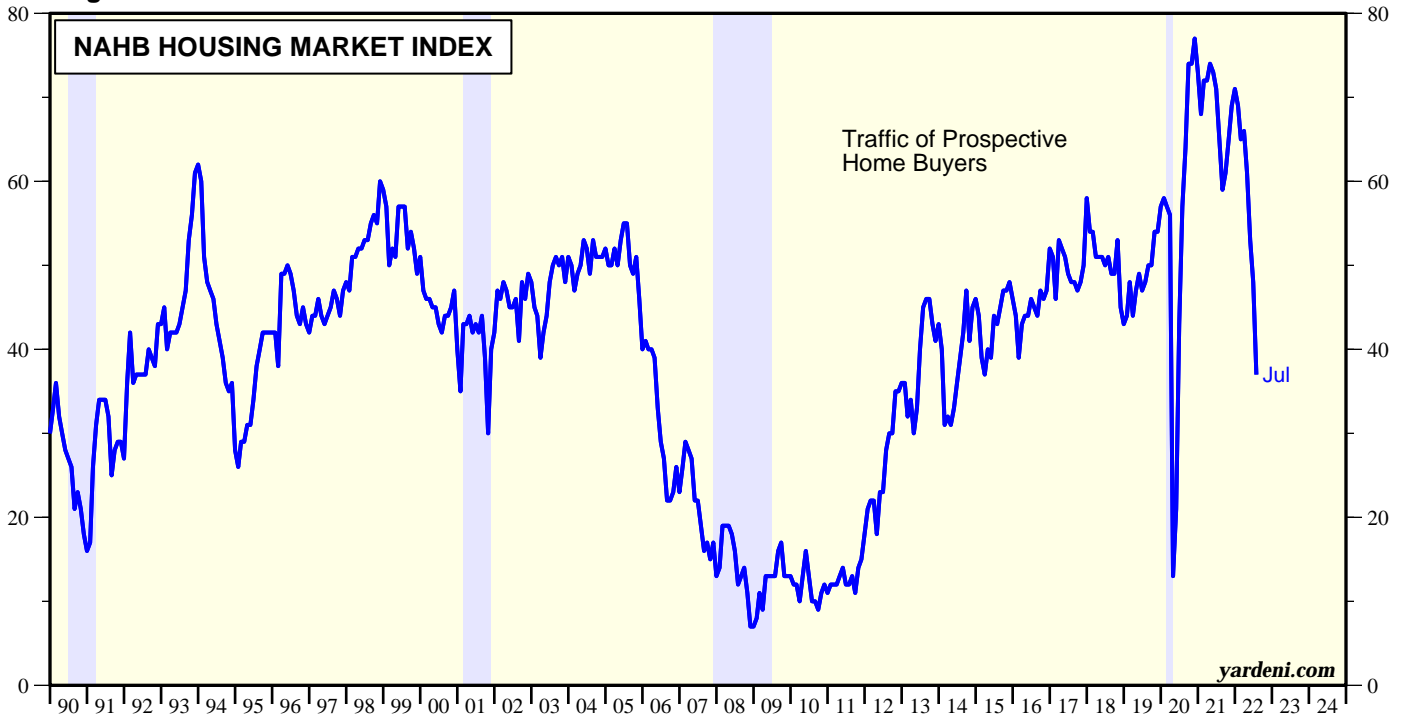
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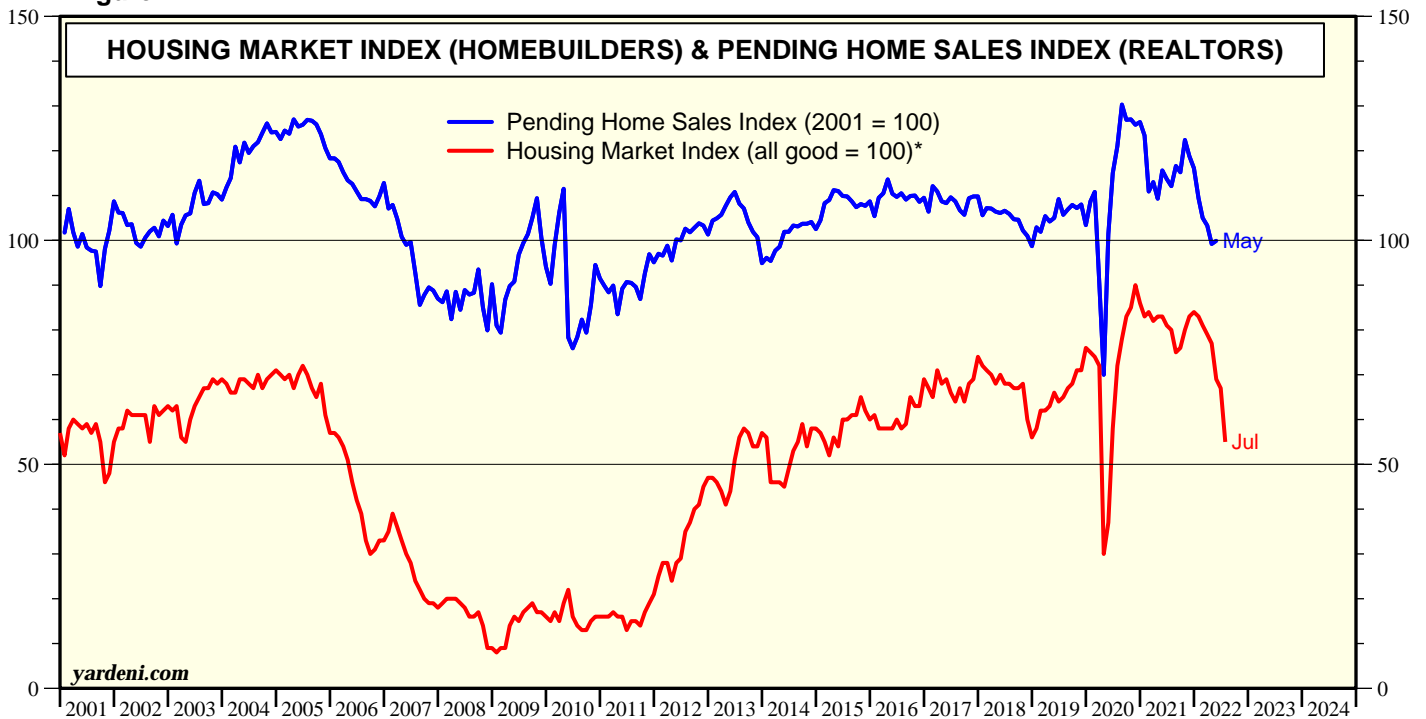
thinking outside the box

Figure 1.



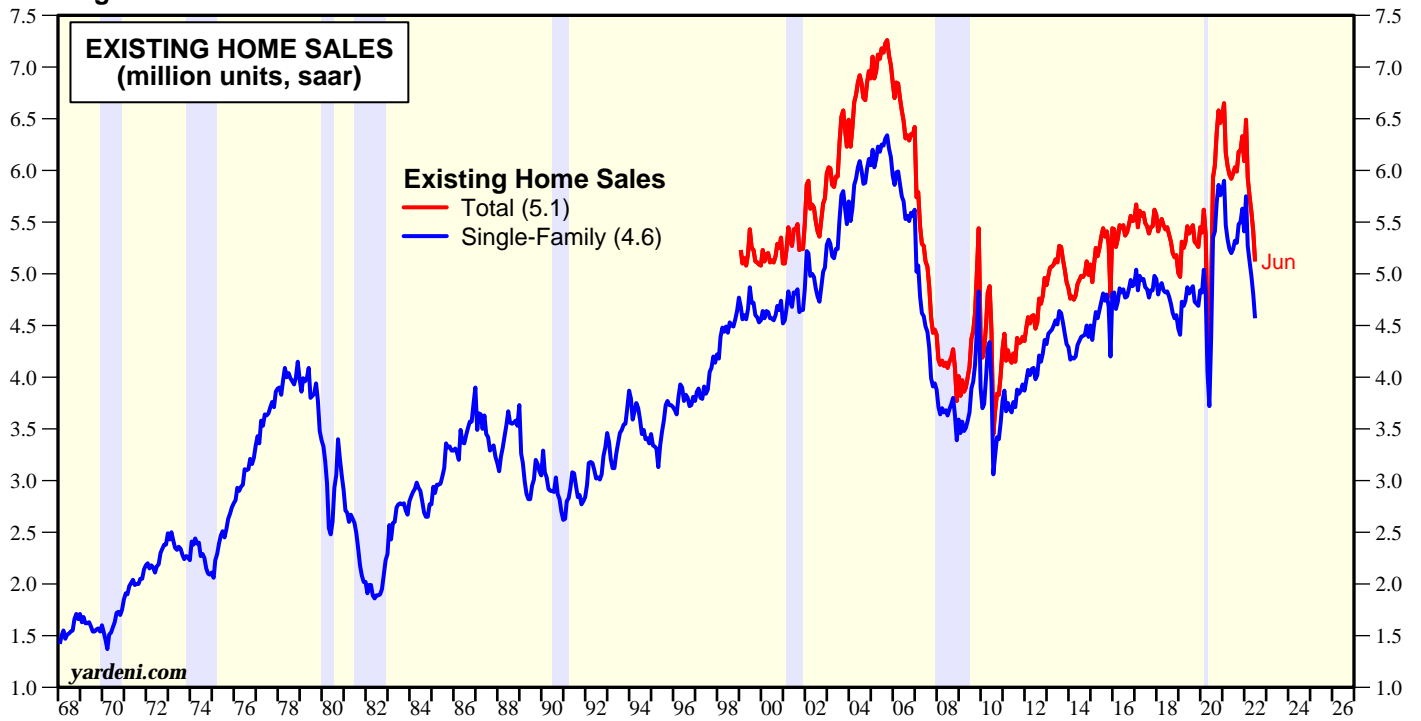
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: National Association of Home Builders.

Figure 2.



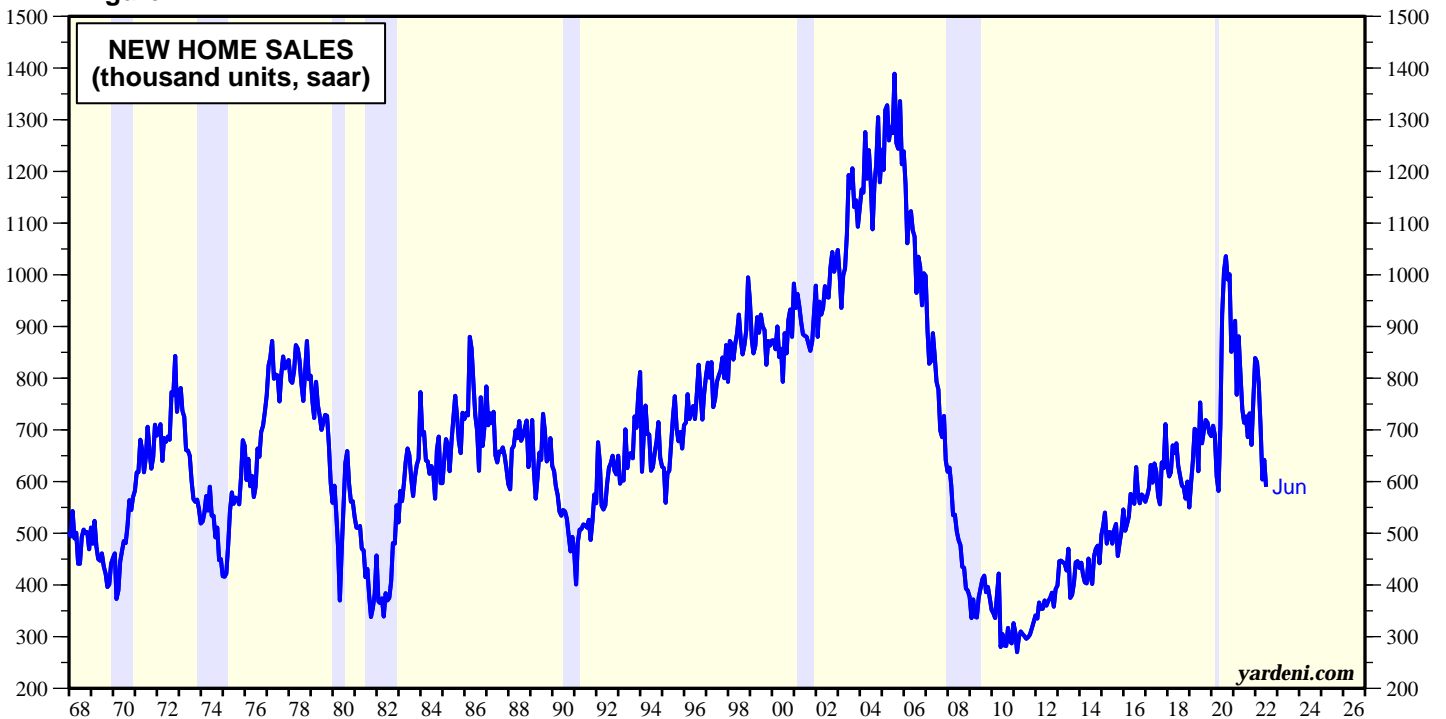
* For each diffusion index, when all respondents answer "good," the index is 100. If all respondents answer "poor," the index is 0. If equal numbers of respondents answer "good" and "poor", the index is 50.
 Source: National Association of Realtors and National Association of Home Builders.

Figure 3.



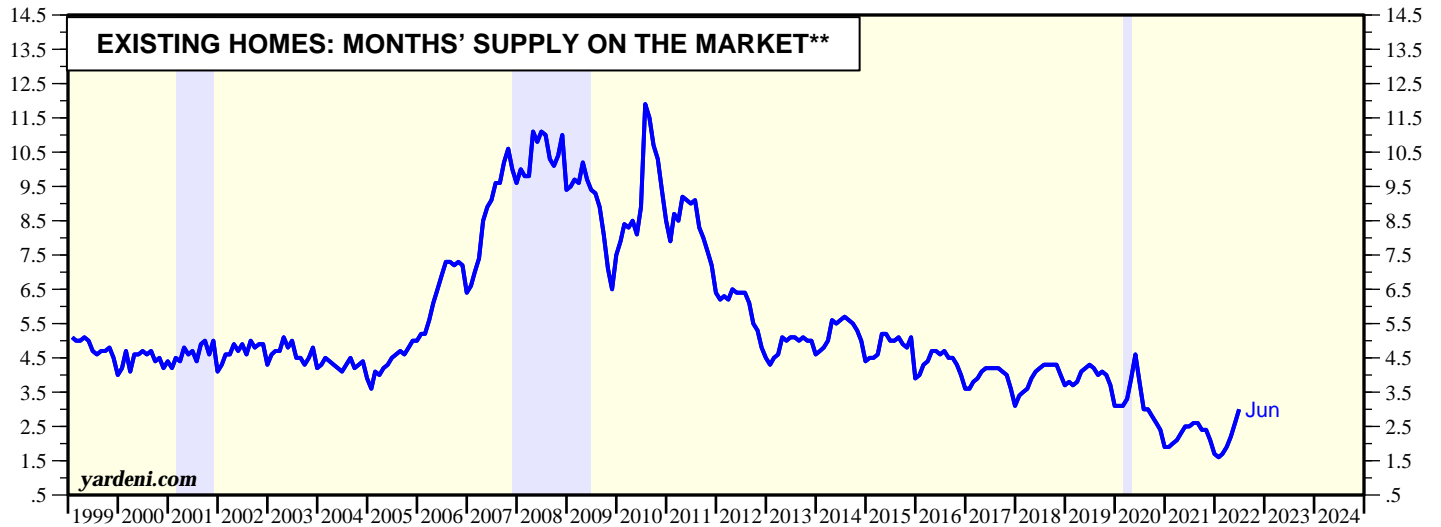
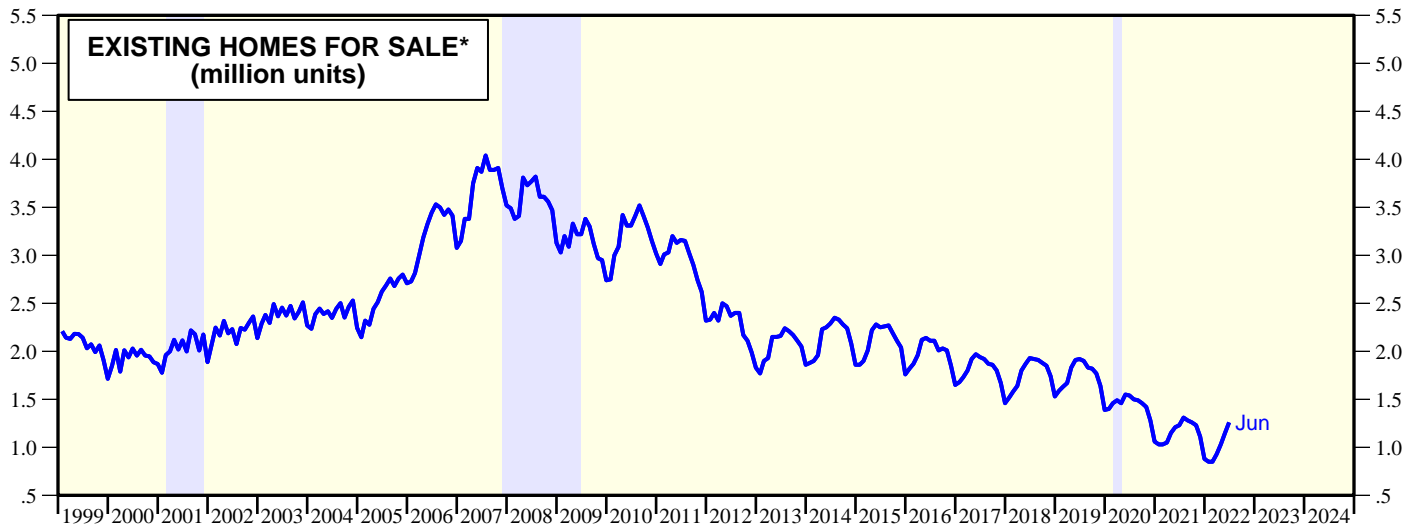
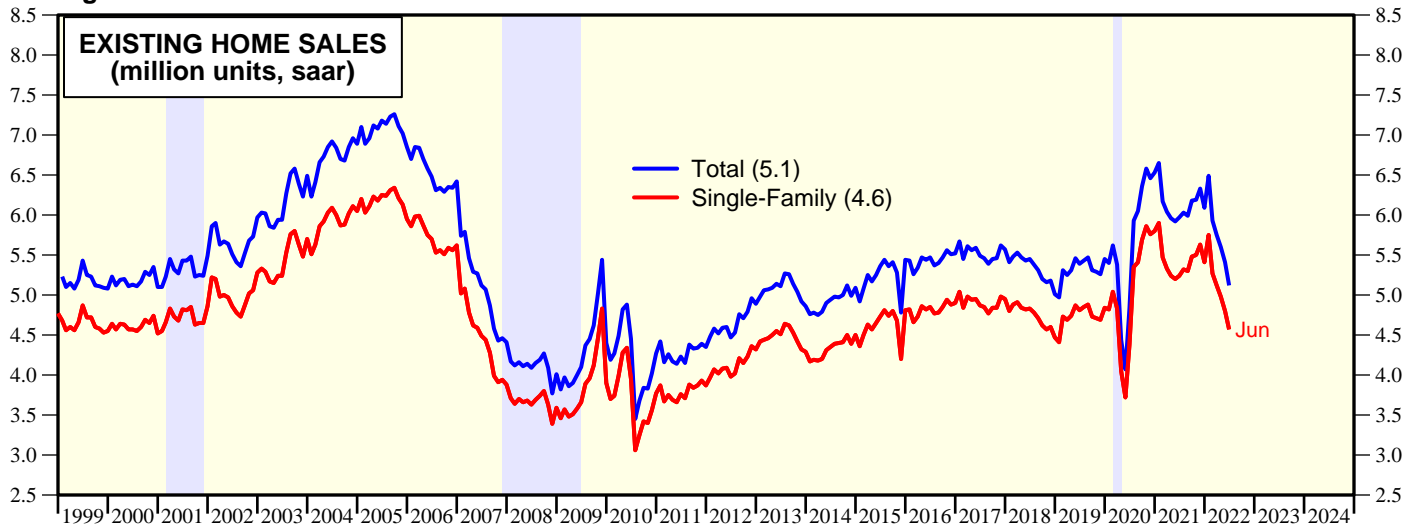
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: National Association of Realtors.

Figure 4.



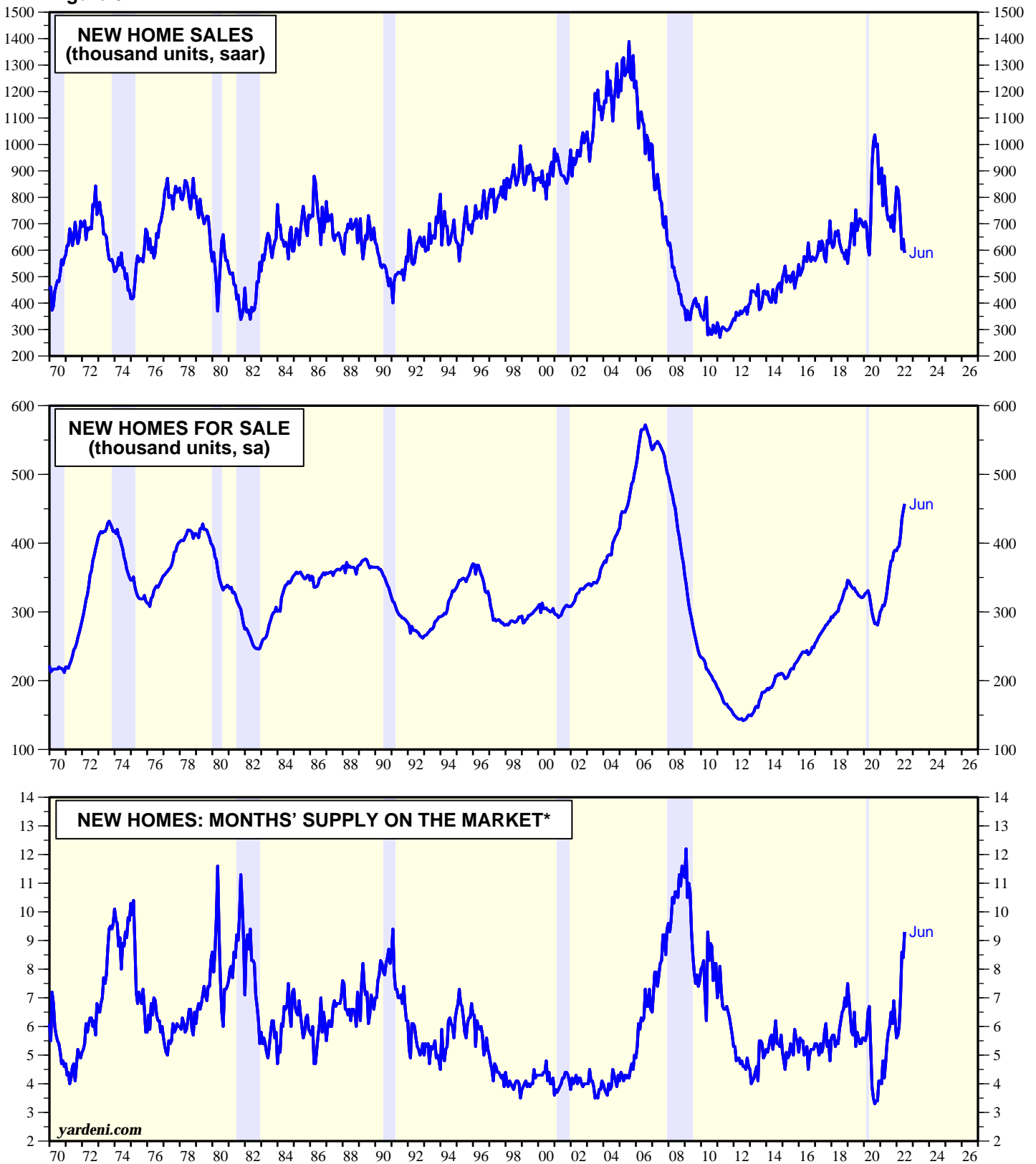
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Census Bureau.

Figure 5.



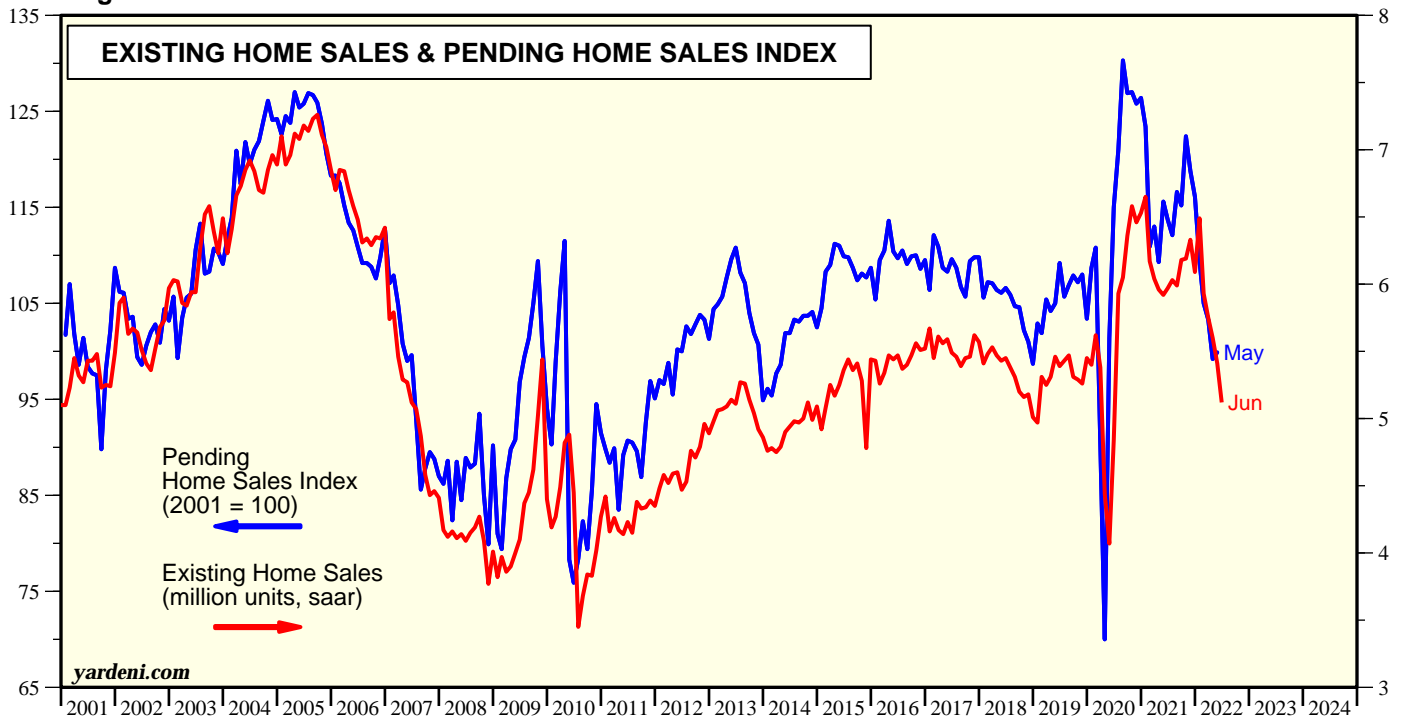
* Break-adjusted.
 ** Ratio of existing homes for sale to existing homes sold.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: National Association of Realtors.

Figure 6.



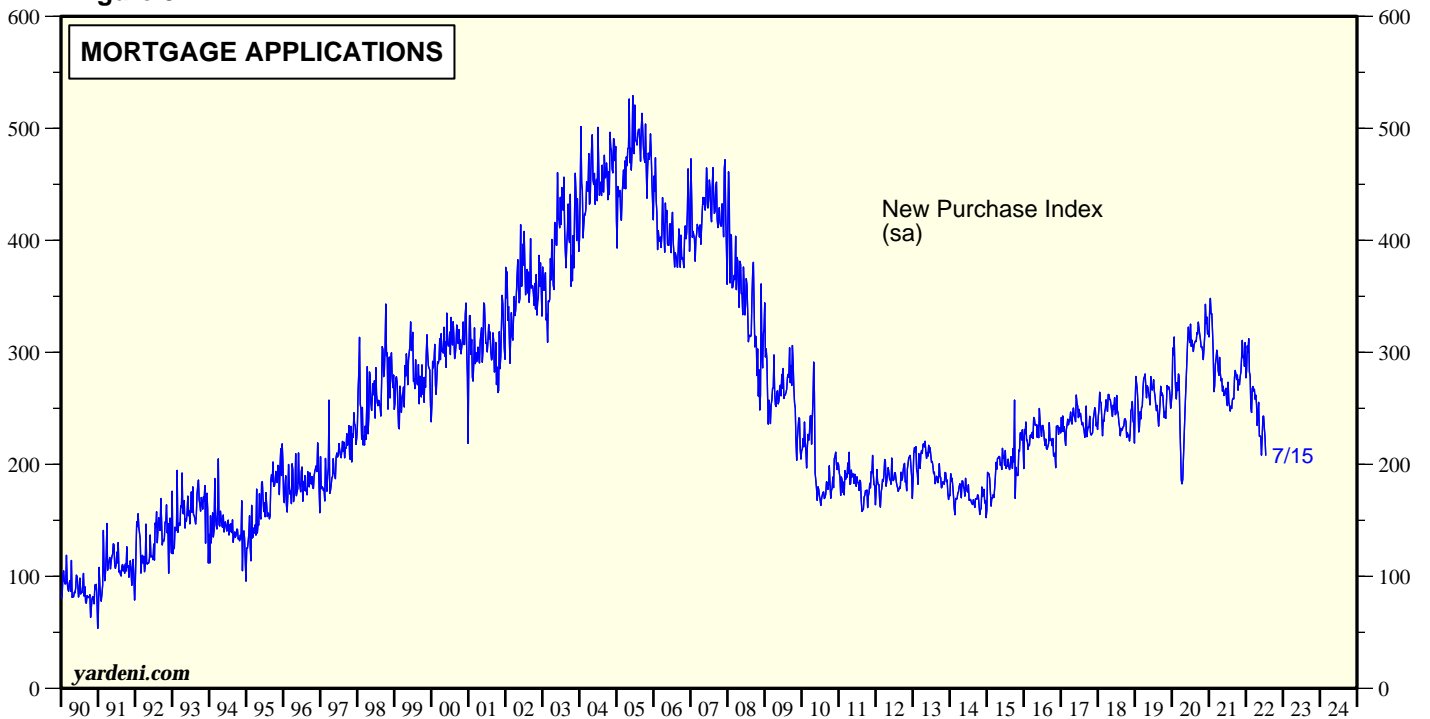
* Ratio of new homes for sale to new homes sold.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Census Bureau.

Figure 7.



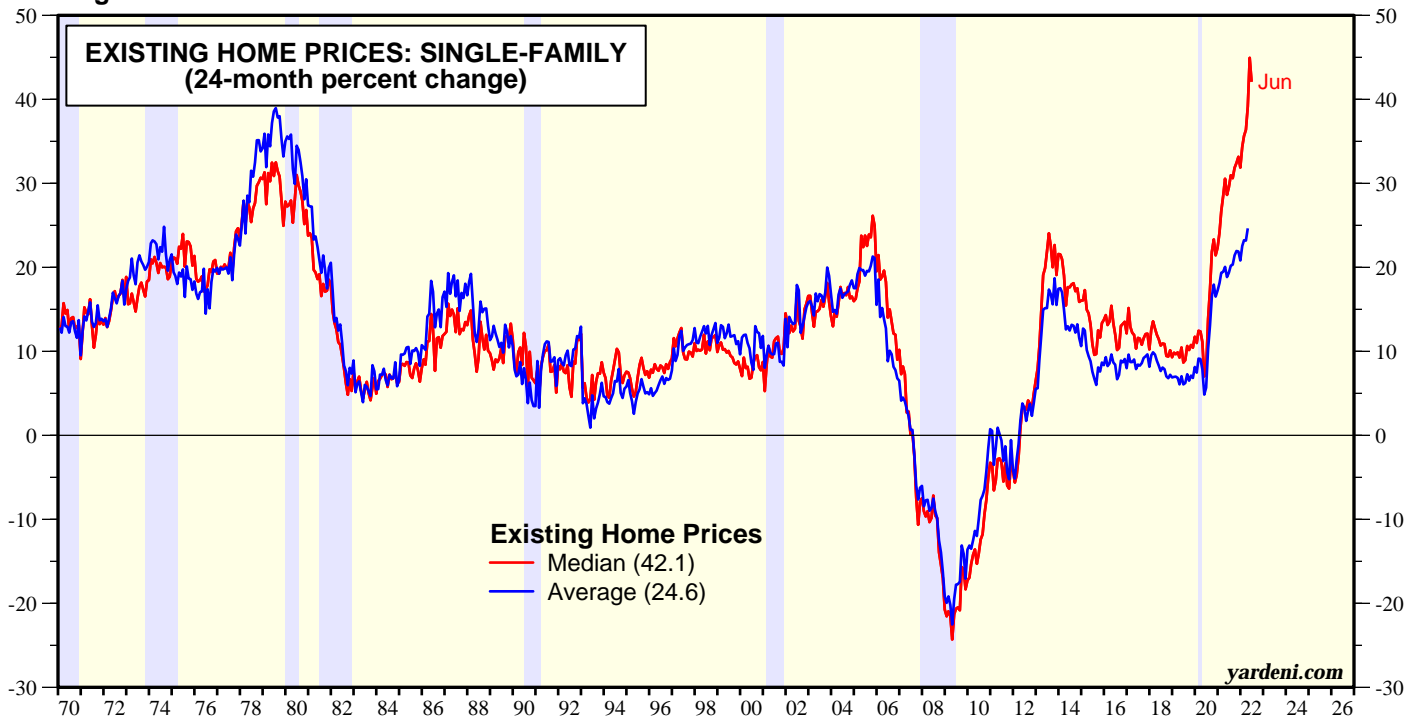
Source: National Association of Realtors.

Figure 8.



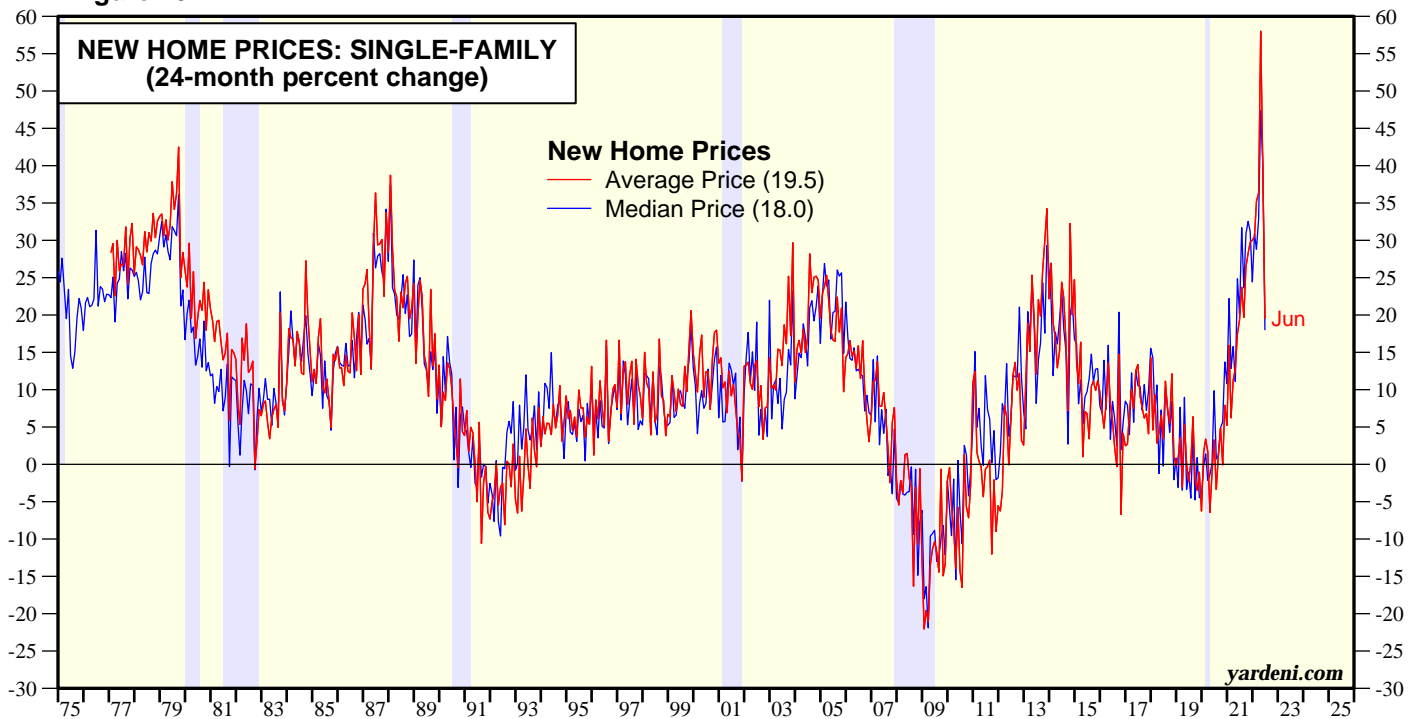
Source: Mortgage Bankers of America.

Figure 9.



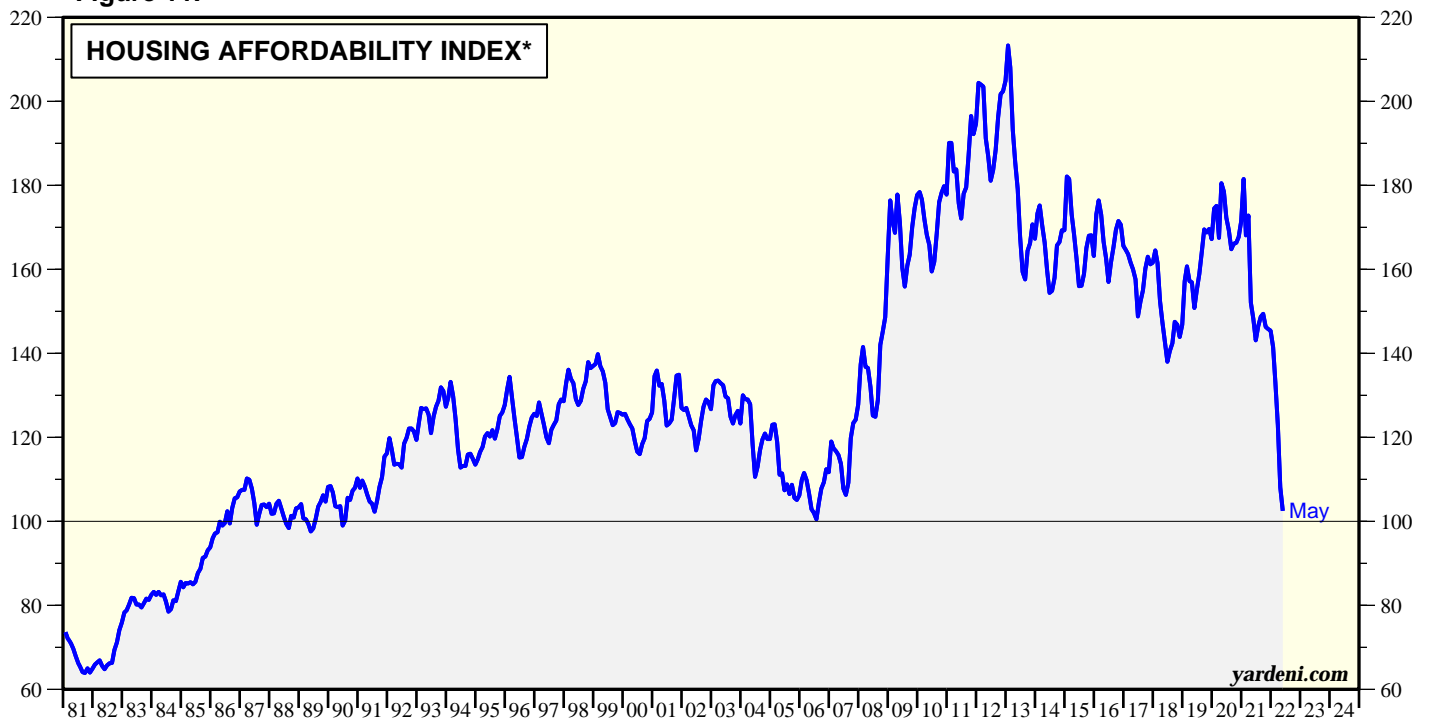
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: National Association of Realtors.

Figure 10.



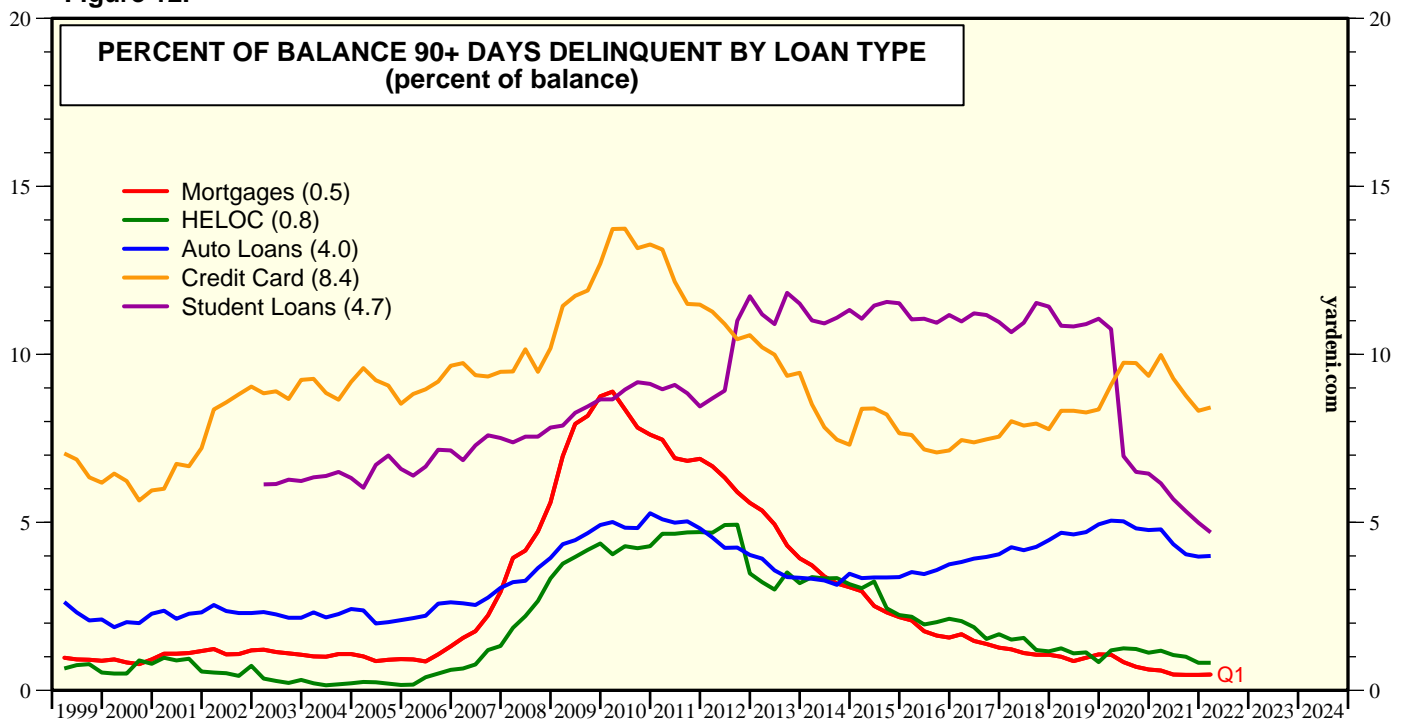
Source: Census Bureau.

Figure 11.



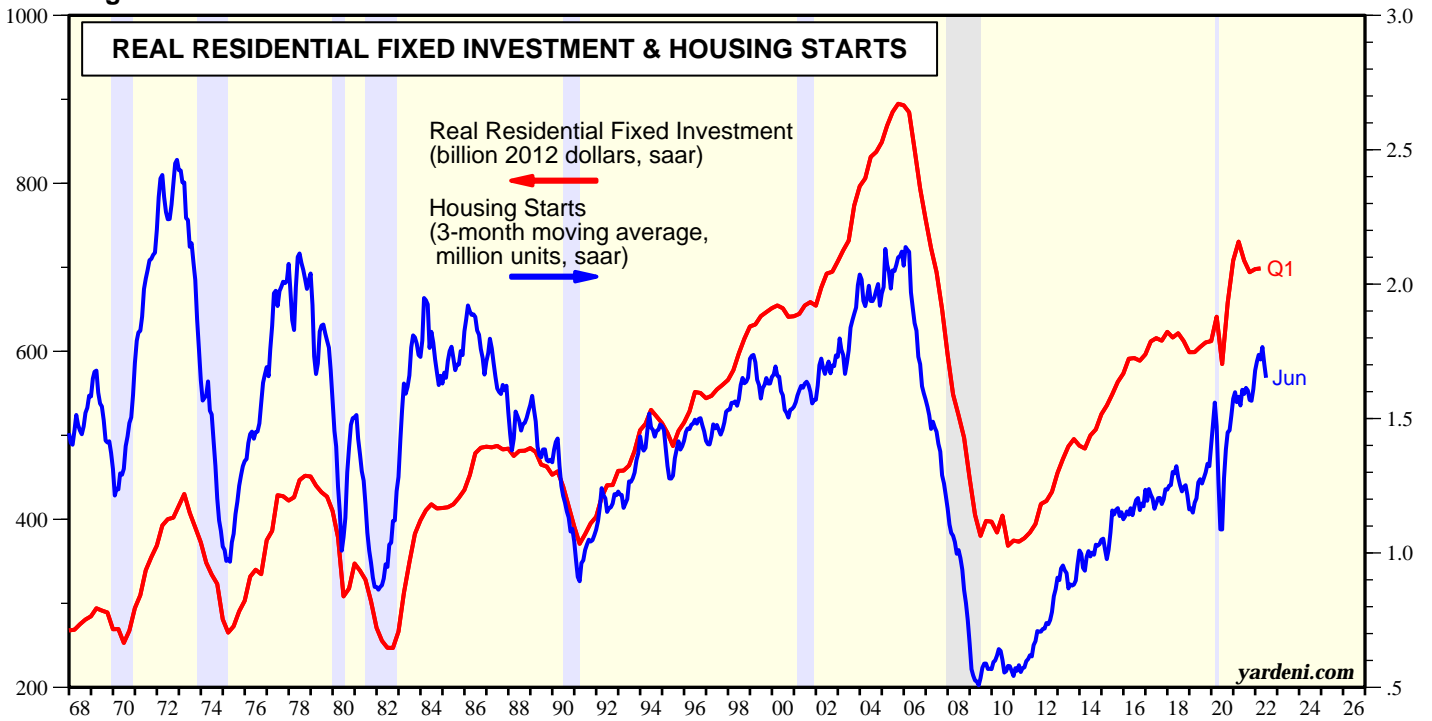
* Based on 30-year fixed rate mortgage.
Source: National Association of Realtors.

Figure 12.



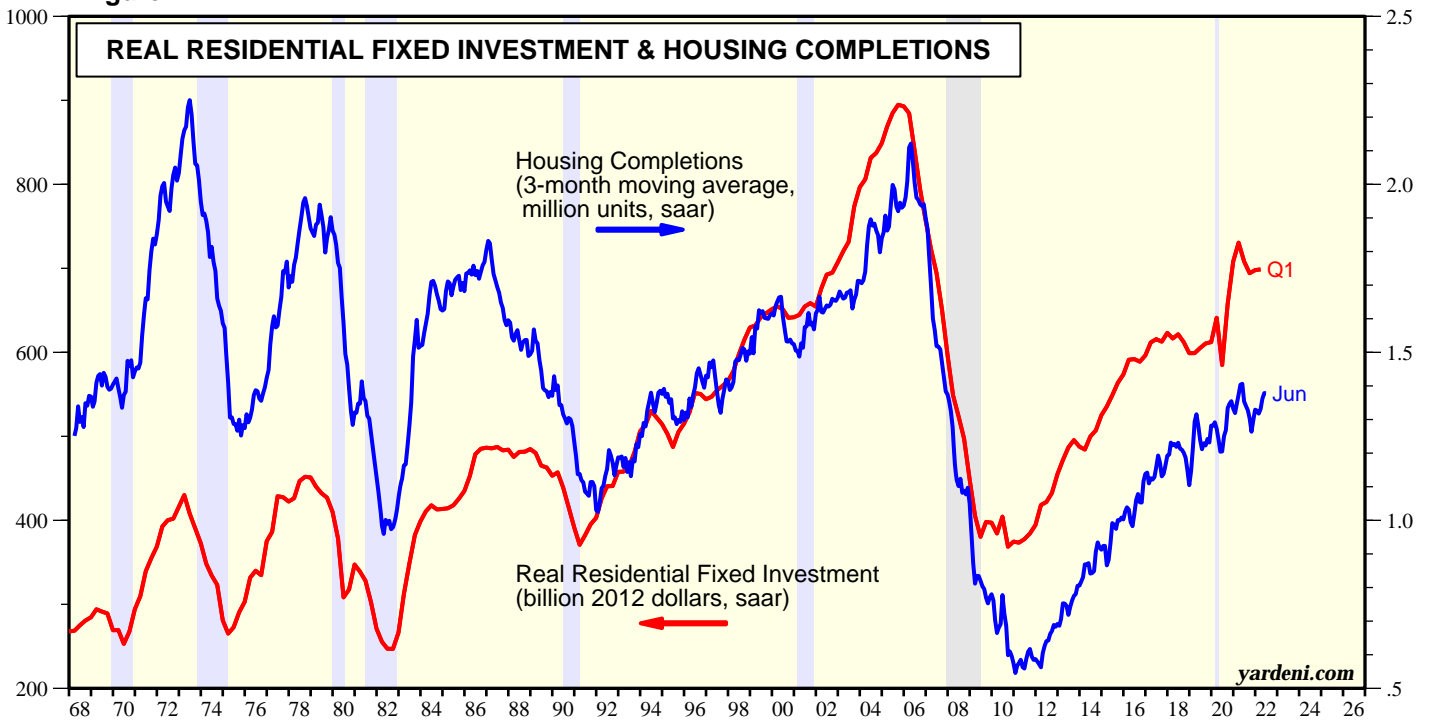
Source: New York Fed Credit Panel.

Figure 13.



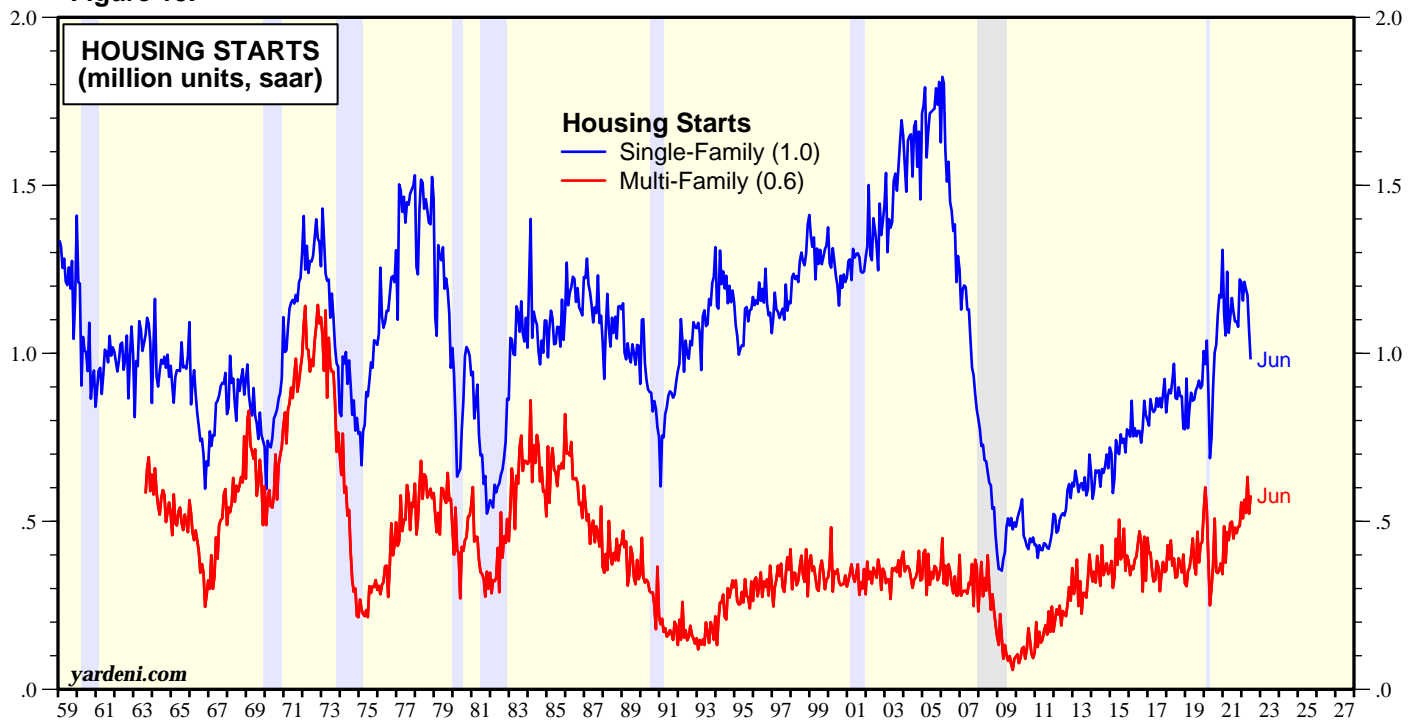
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Bureau of Economic Analysis and Census Bureau.

Figure 14.



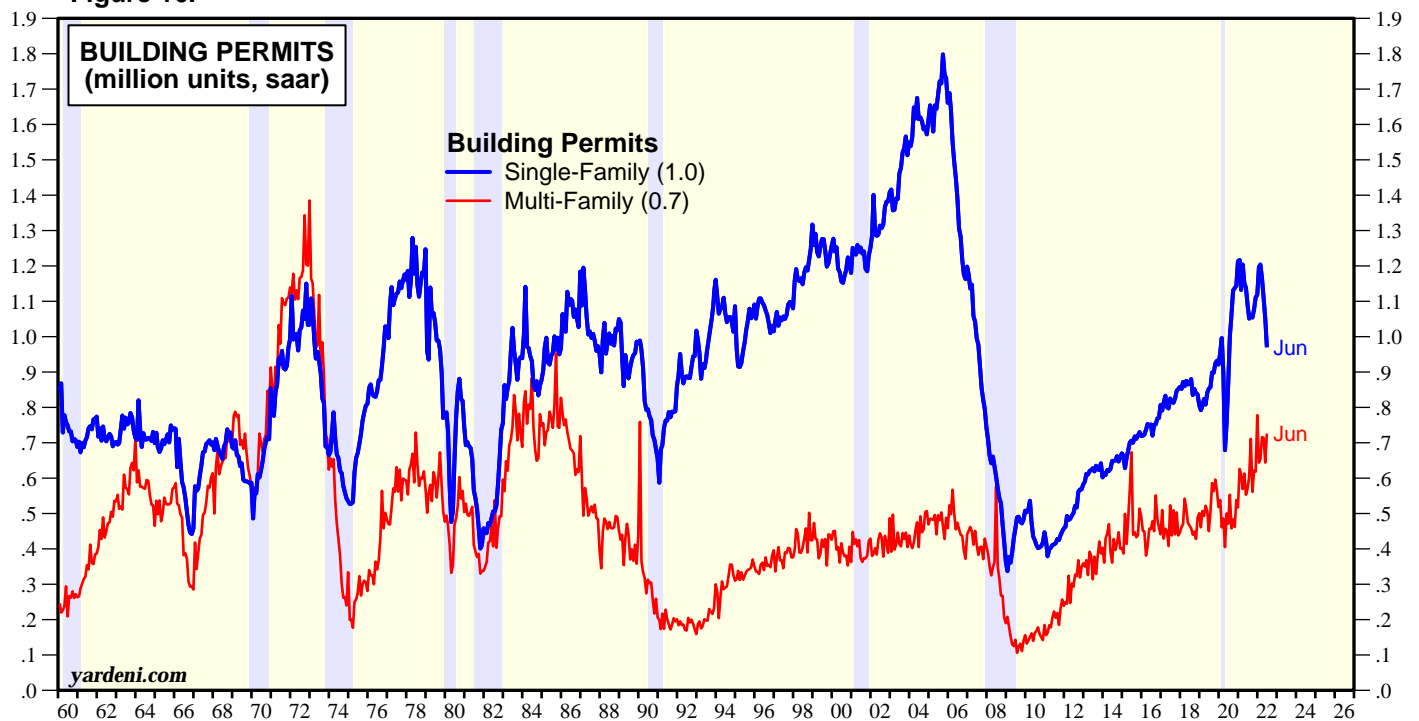
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Bureau of Economic Analysis and Census Bureau.

Figure 15.



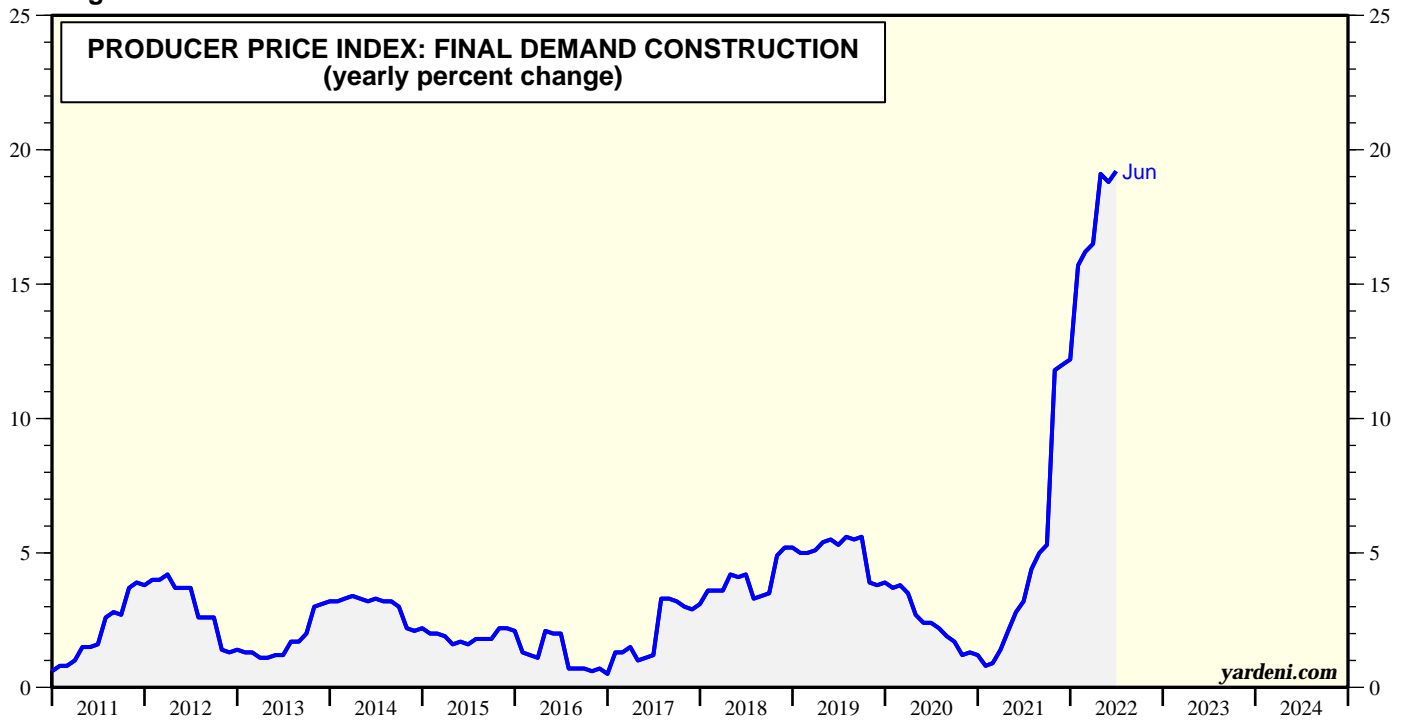
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Census Bureau.

Figure 16.



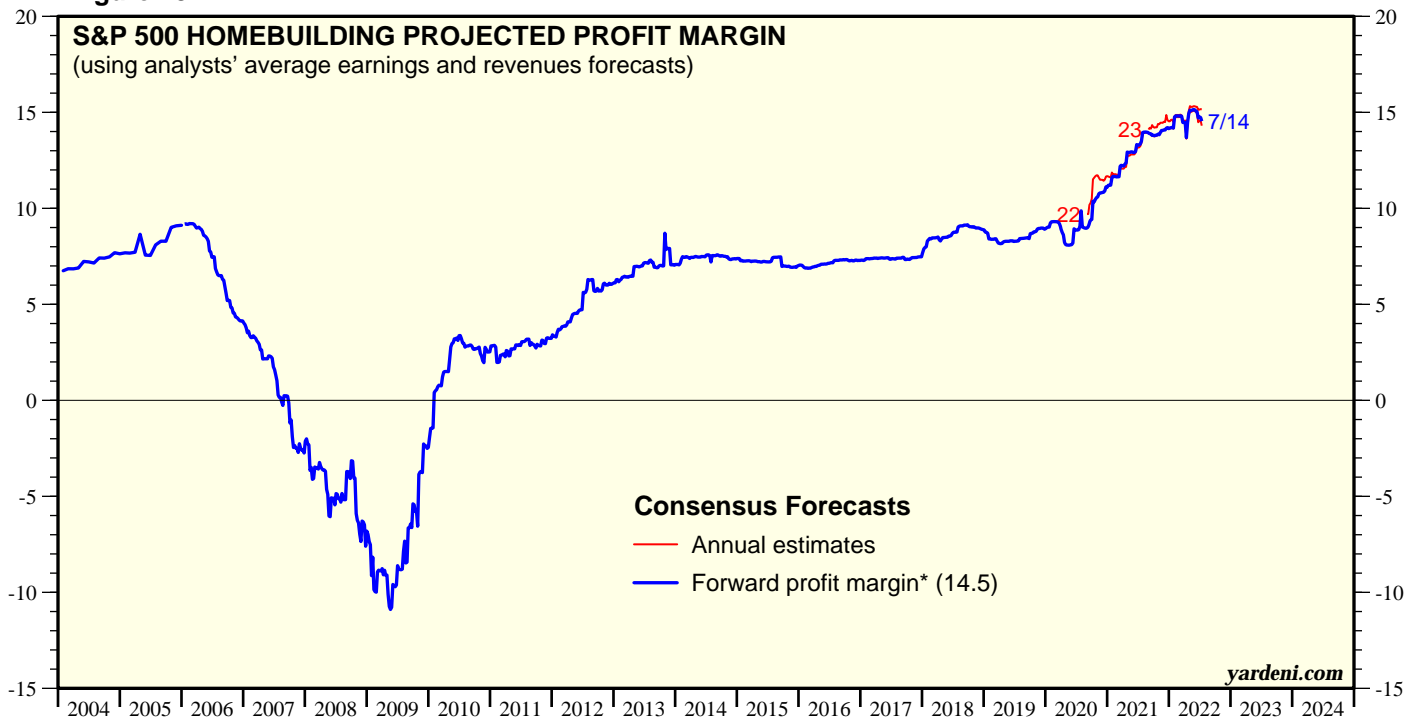
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Census Bureau.

Figure 17.



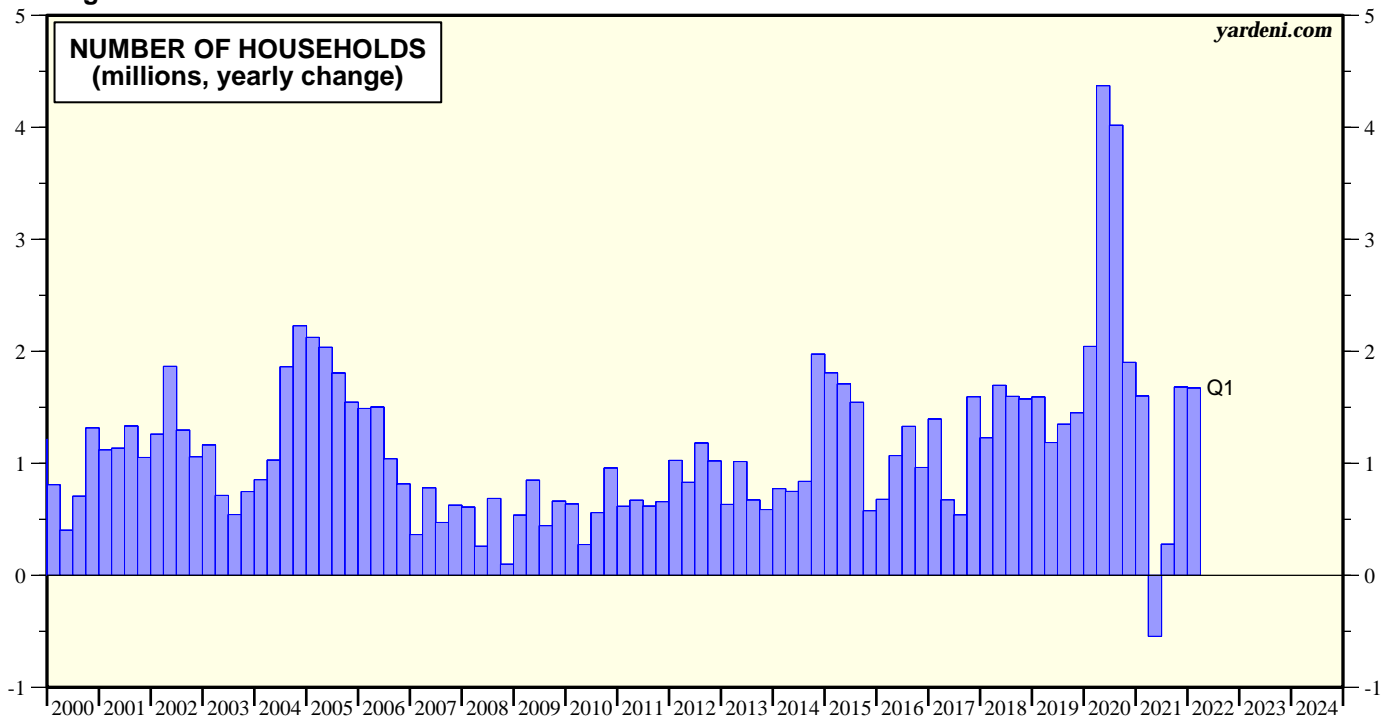
Source: Bureau of Labor Statistics.

Figure 18.



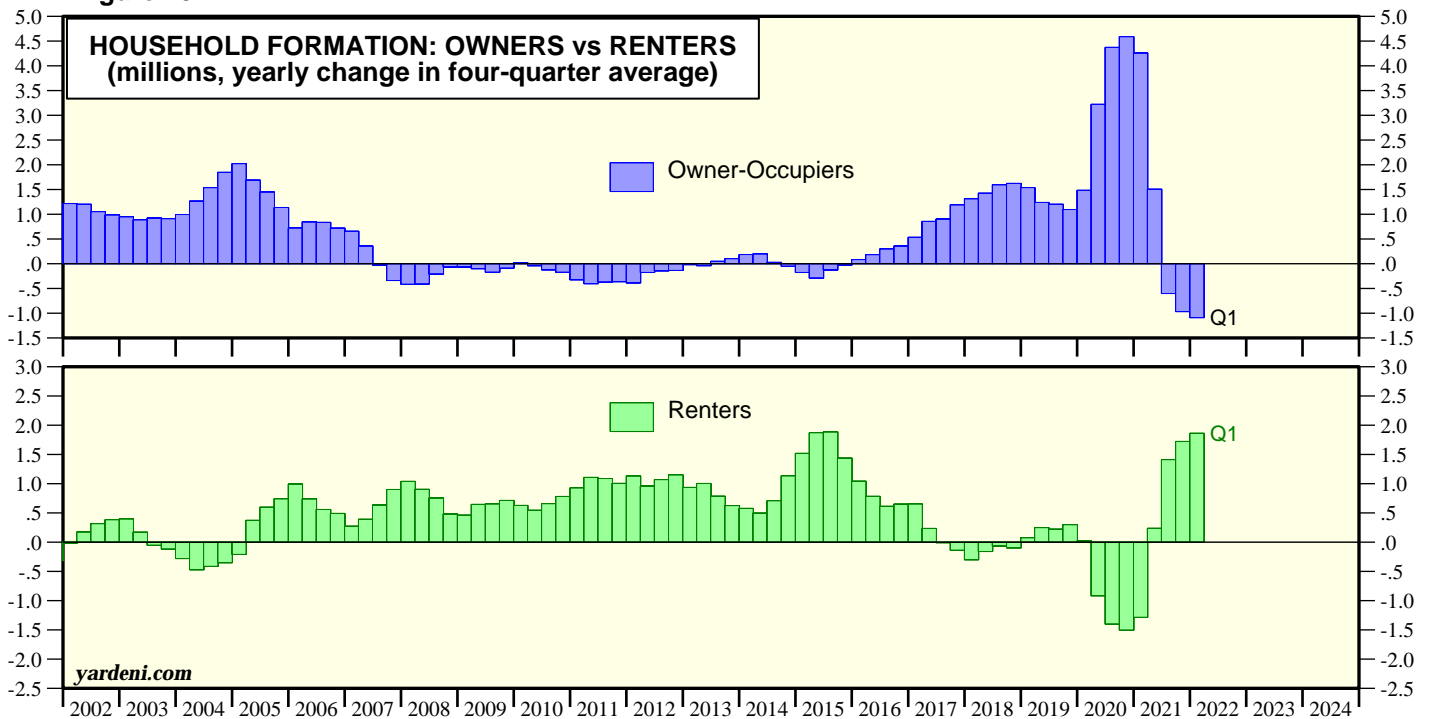
* Time-weighted average of the consensus estimates for current year and next year. Monthly through December 2005, weekly thereafter.
Source: I/B/E/S data by Refinitiv.

Figure 19.



* Break-adjusted. These breaks are a result of the Census occasionally altering the size of the sample and making methodological changes as well as aligning the sample data to the decennial census.
Source: Census Bureau.

Figure 20.



Source: Census Bureau and Haver Analytics.

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