

Chart Collection for Morning Briefing

Yardeni Research, Inc.

November 2, 2022

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Mali Quintana

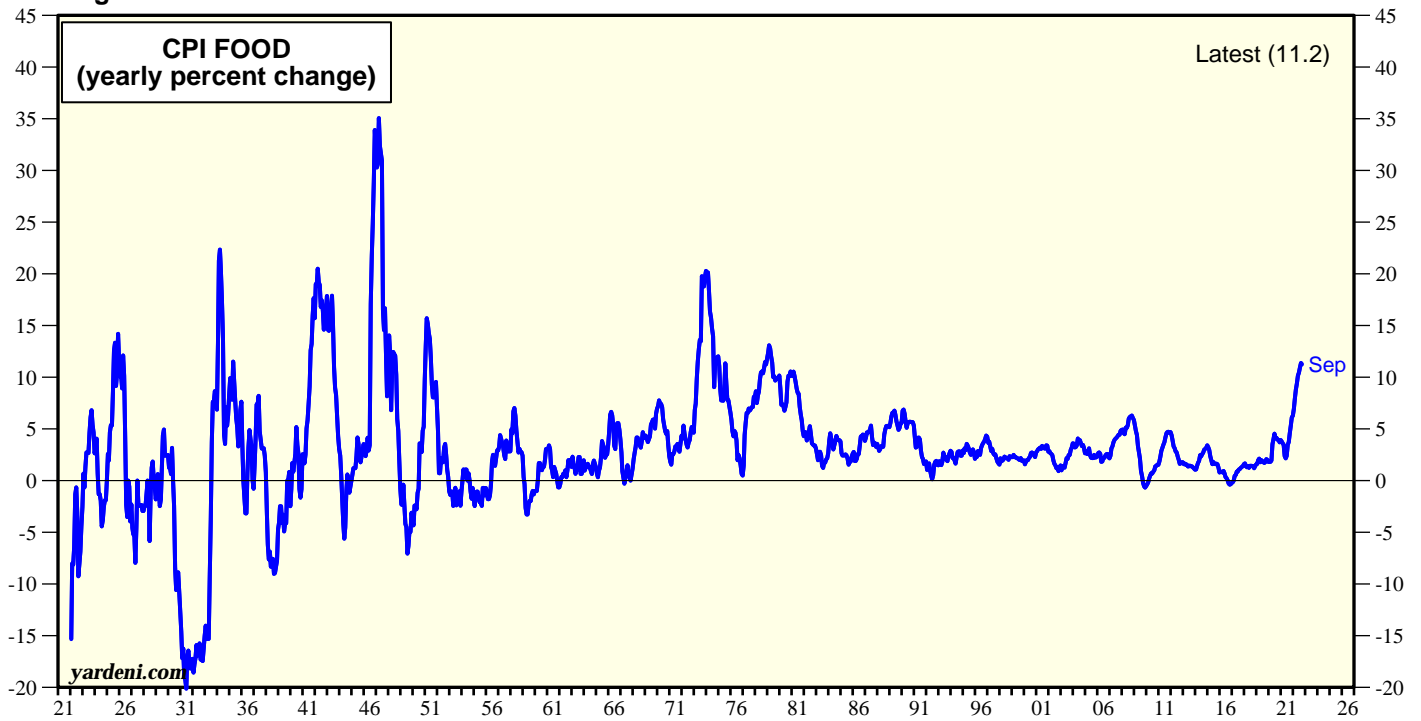
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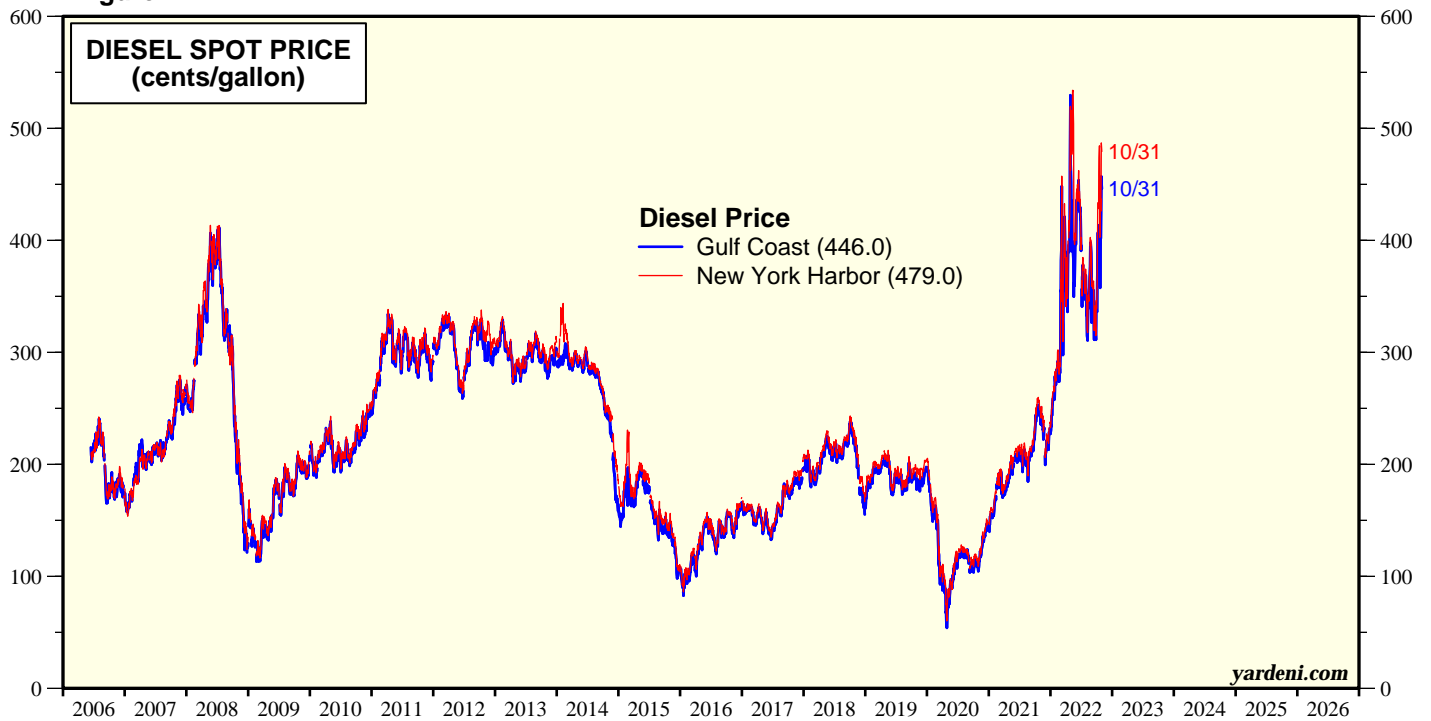
thinking outside the box

Figure 1.



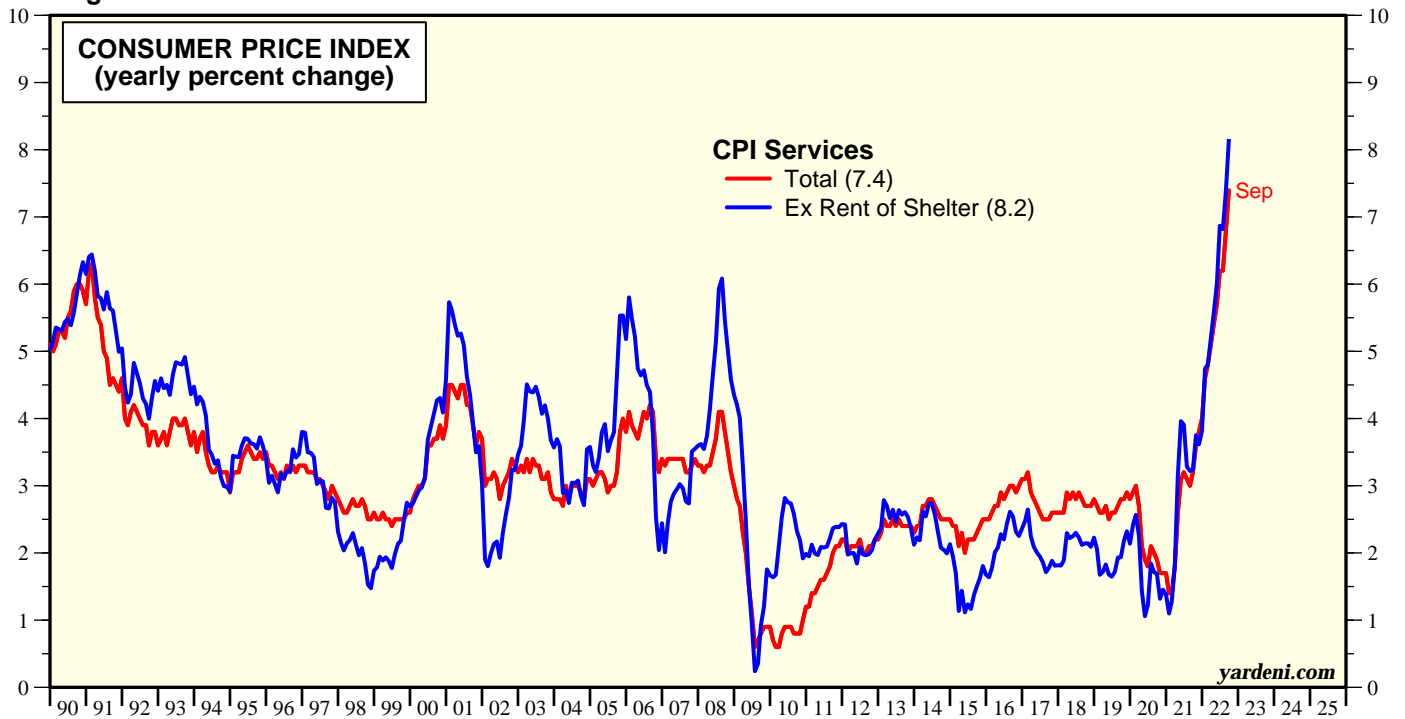
Source: Bureau of Labor Statistics.

Figure 2.



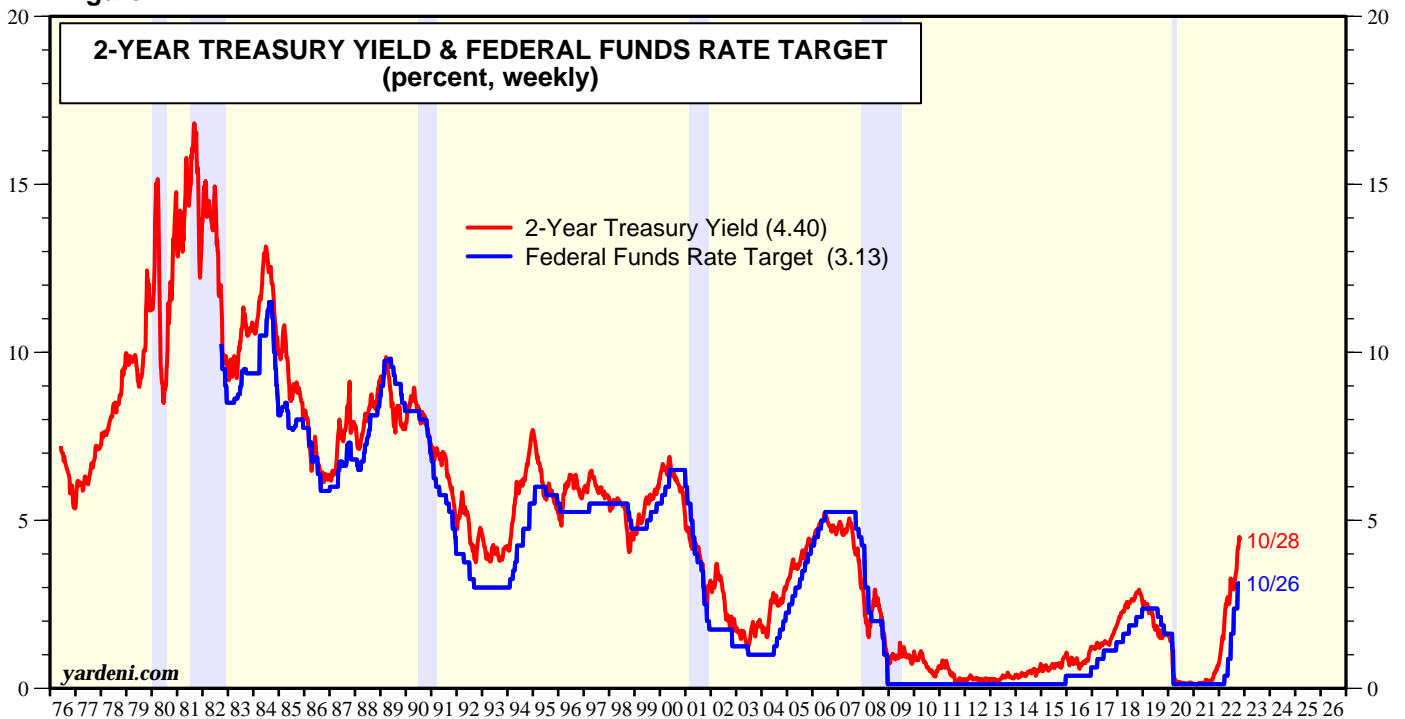
* Ultra low Sulfur, No. 2
Source: Energy Information Administration.

Figure 3.



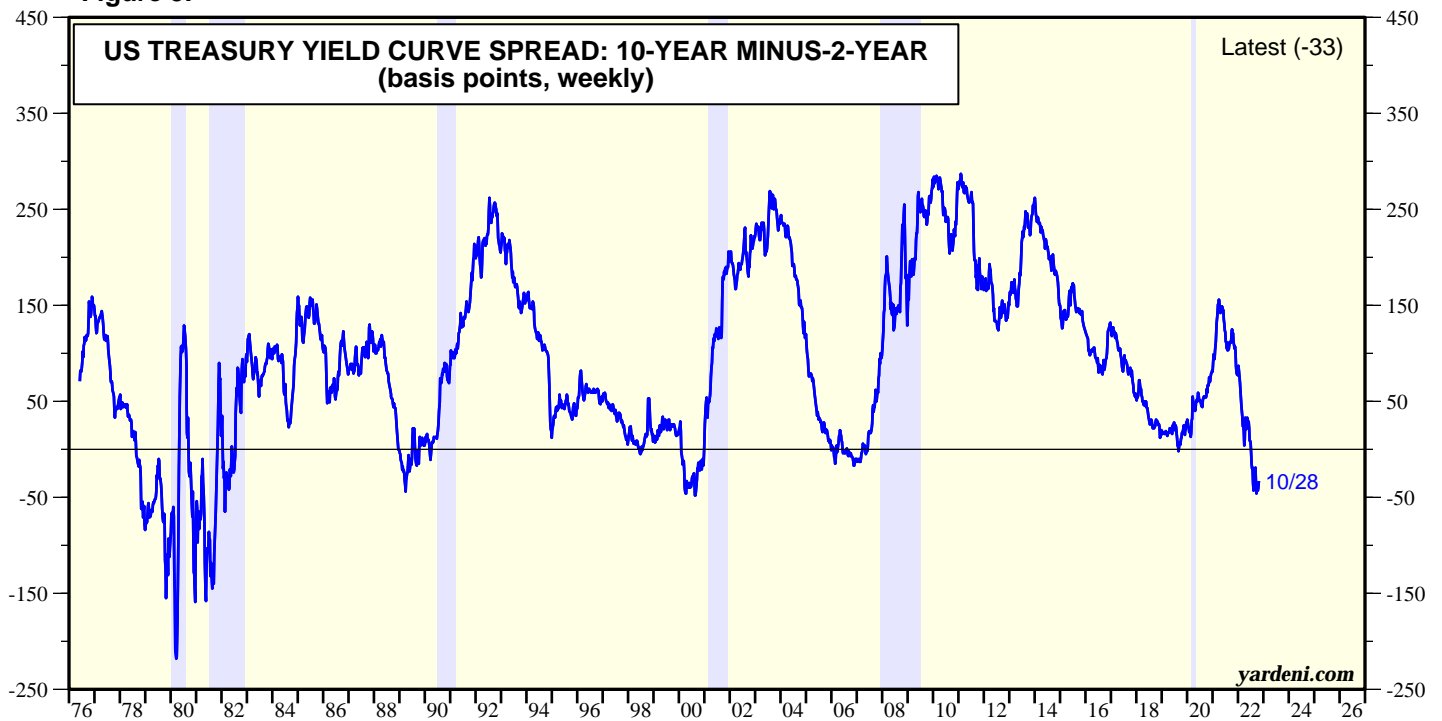
Source: Bureau of Labor Statistics.

Figure 4.



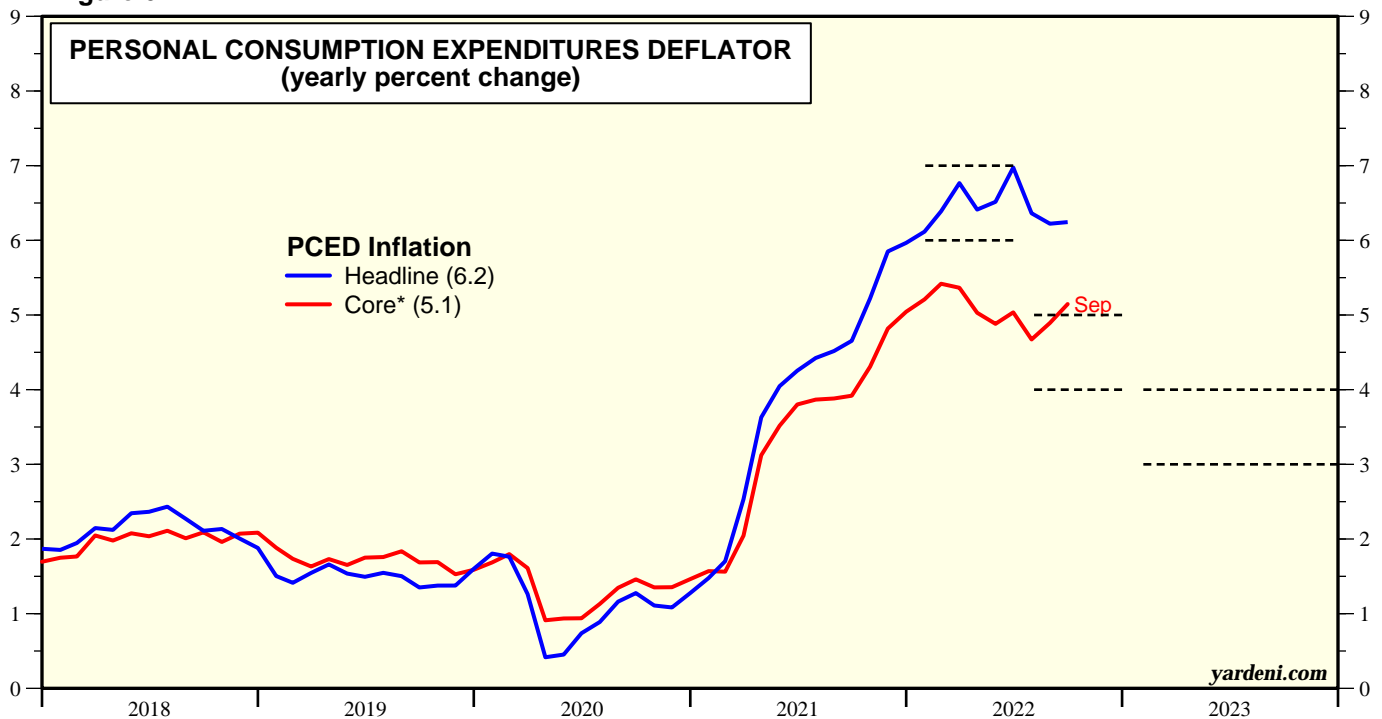
Source: Federal Reserve Board.

Figure 5.



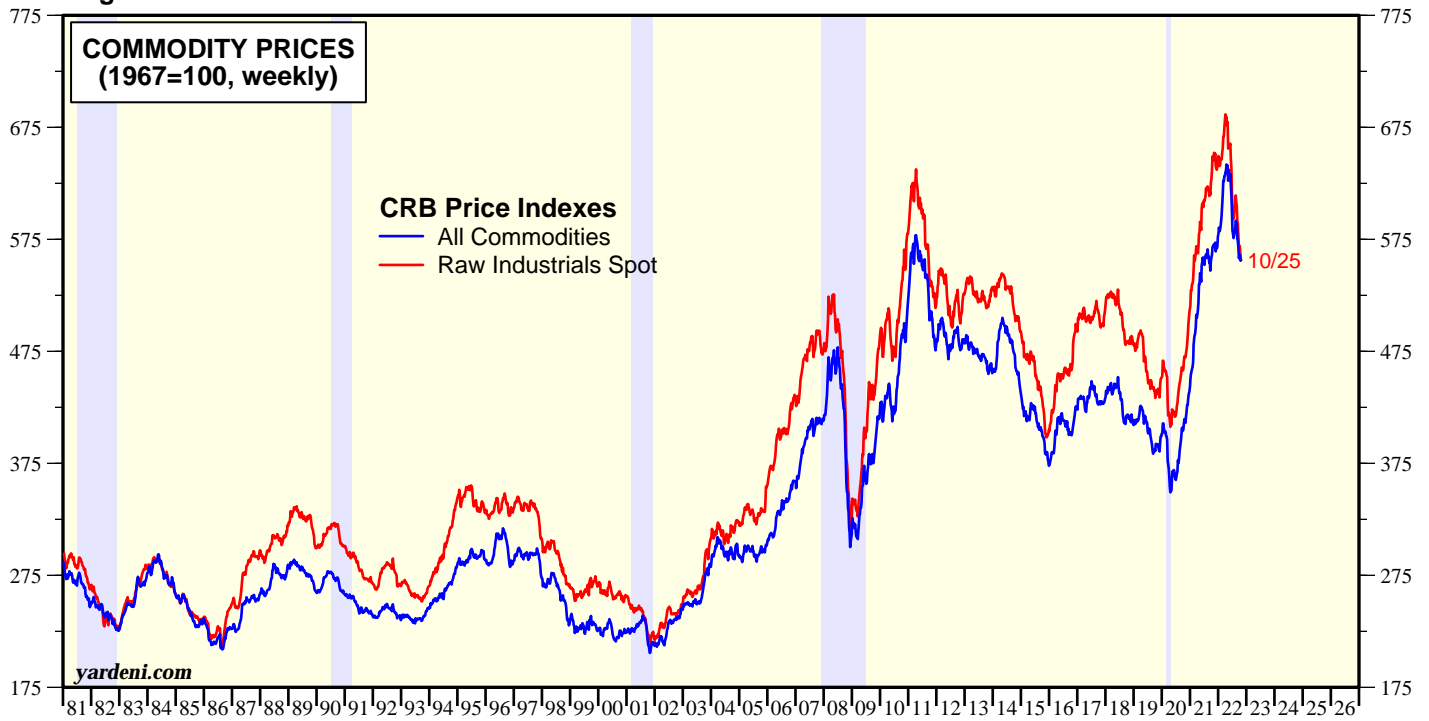
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Haver Analytics.

Figure 6.



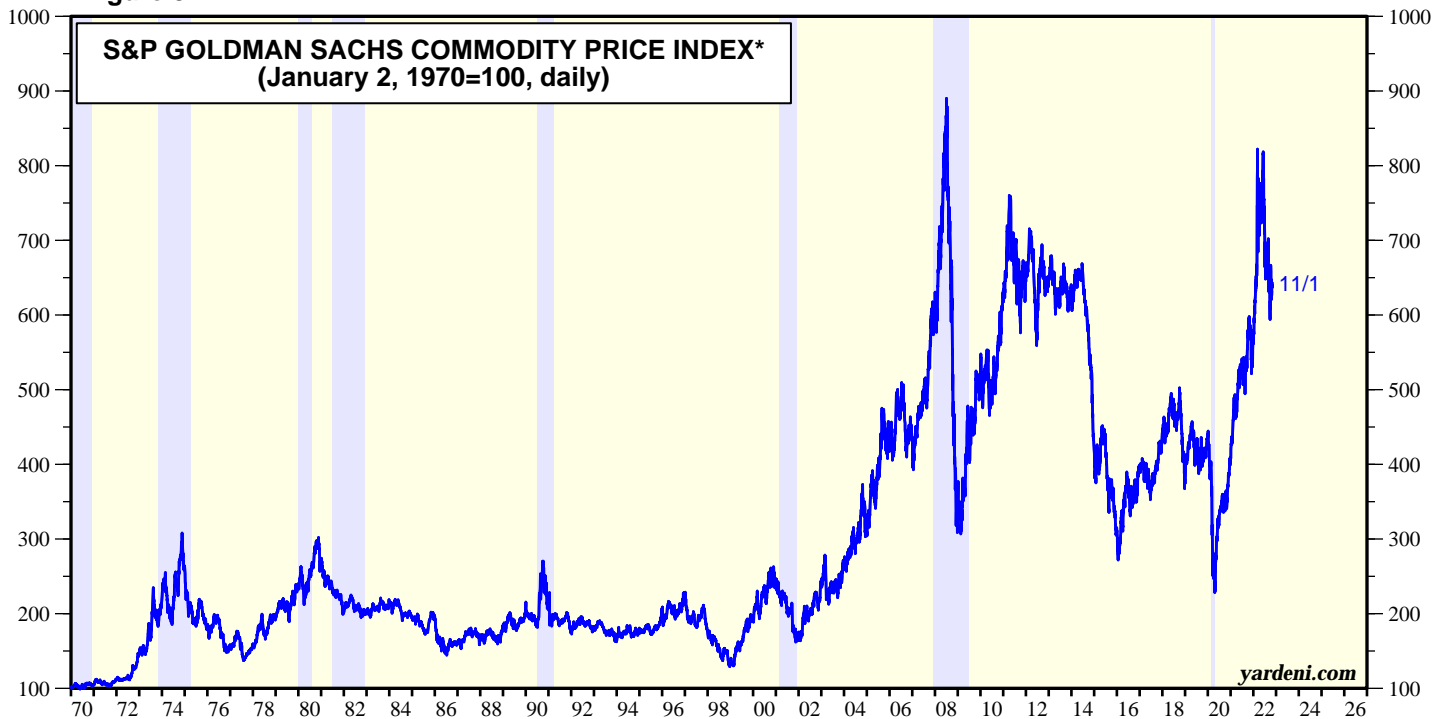
* Excluding food & energy.
Note: Dashed ranges are YRI forecasts for headline PCED inflation rate.
Source: Bureau of Economic Analysis.

Figure 7.



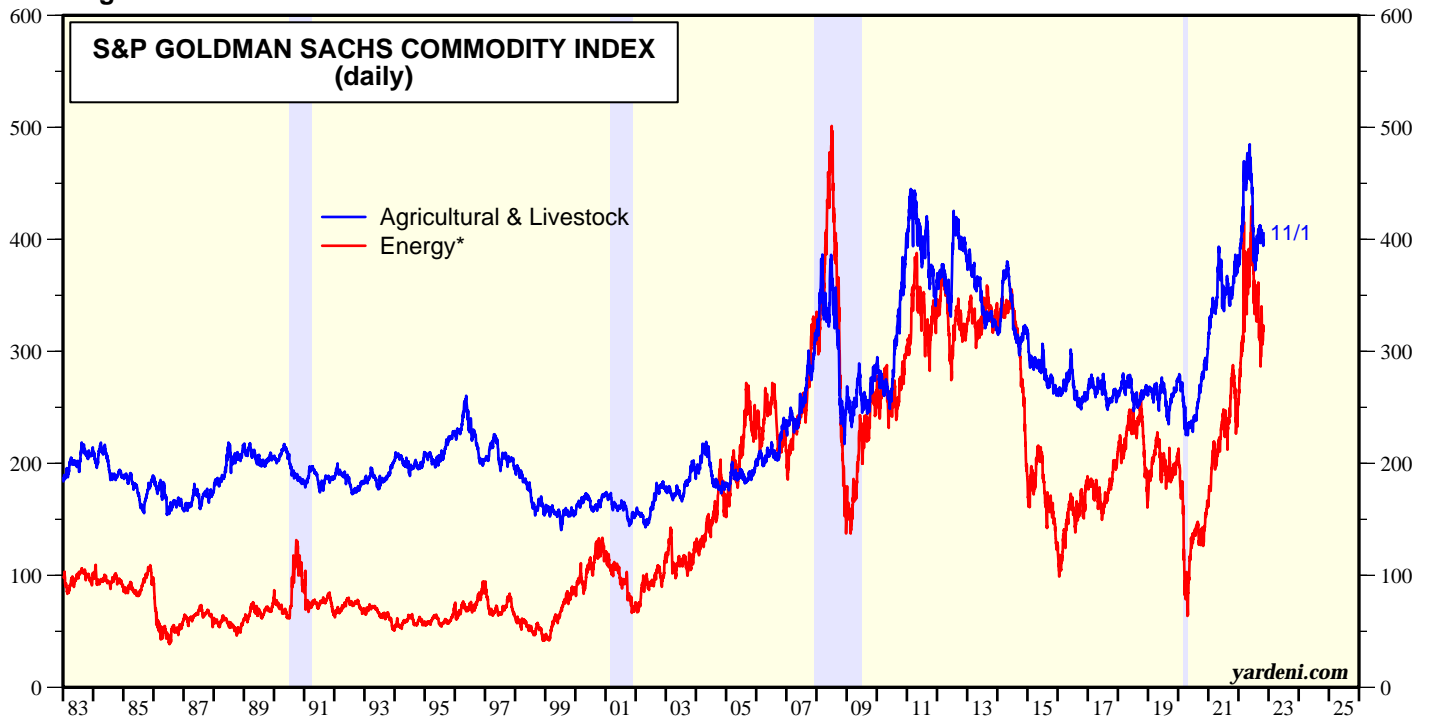
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Haver Analytics.

Figure 8.



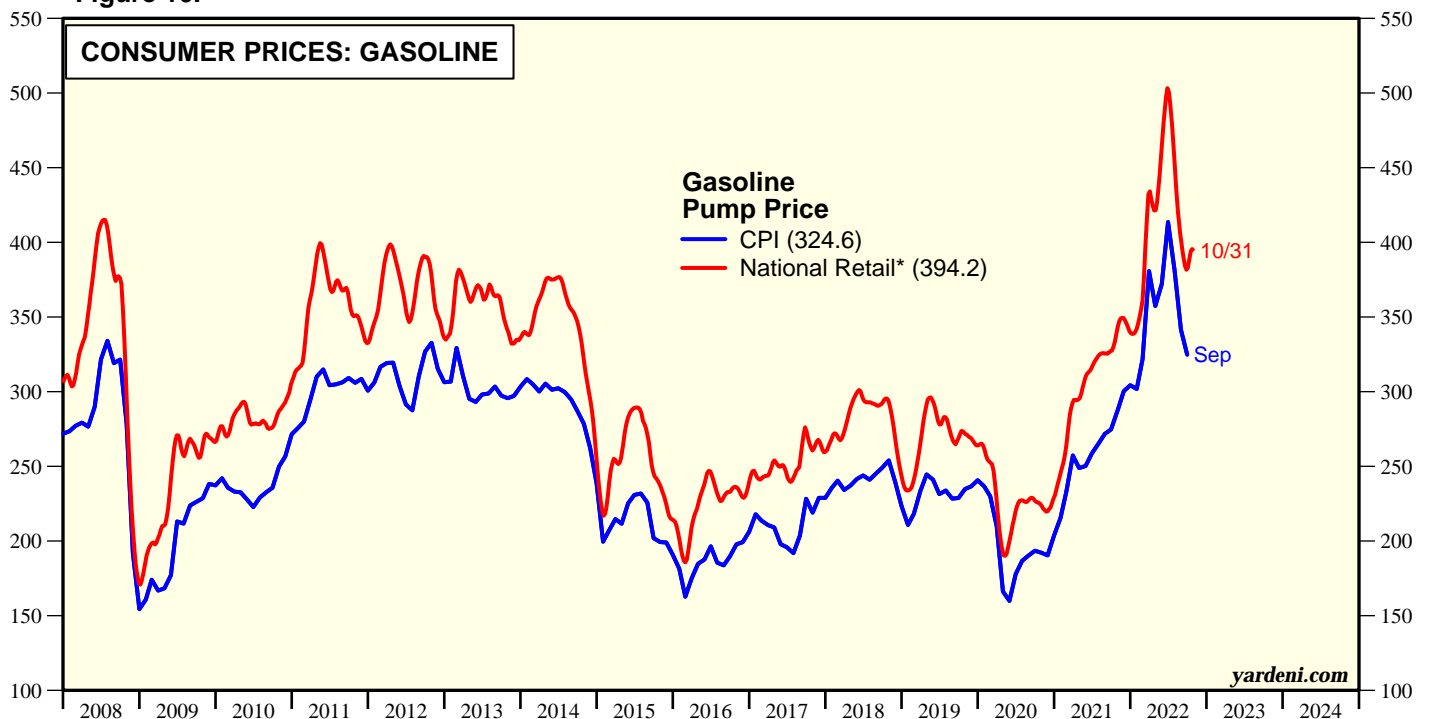
* Nearby futures price.
 Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Standard & Poor's and Haver Analytics.

Figure 9.



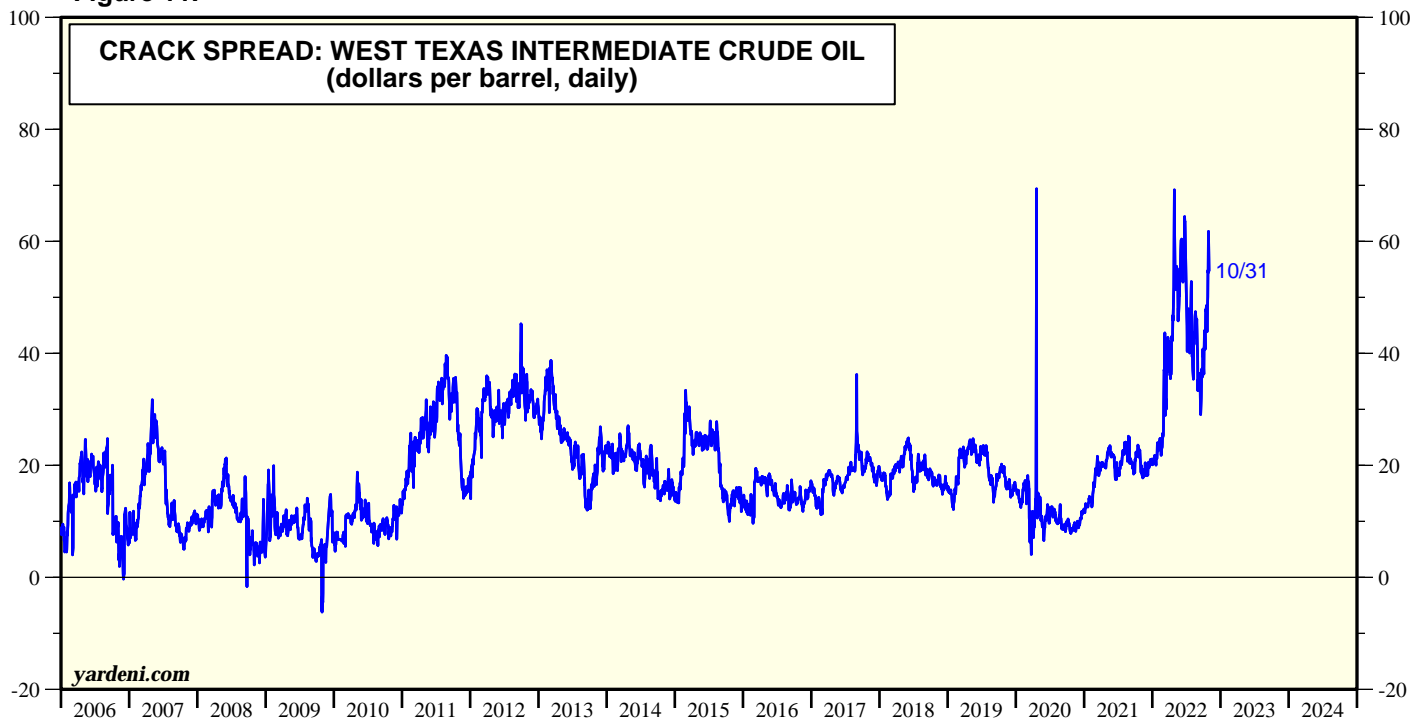
* Nearby futures price.
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Standard & Poor's and Haver Analytics.

Figure 10.



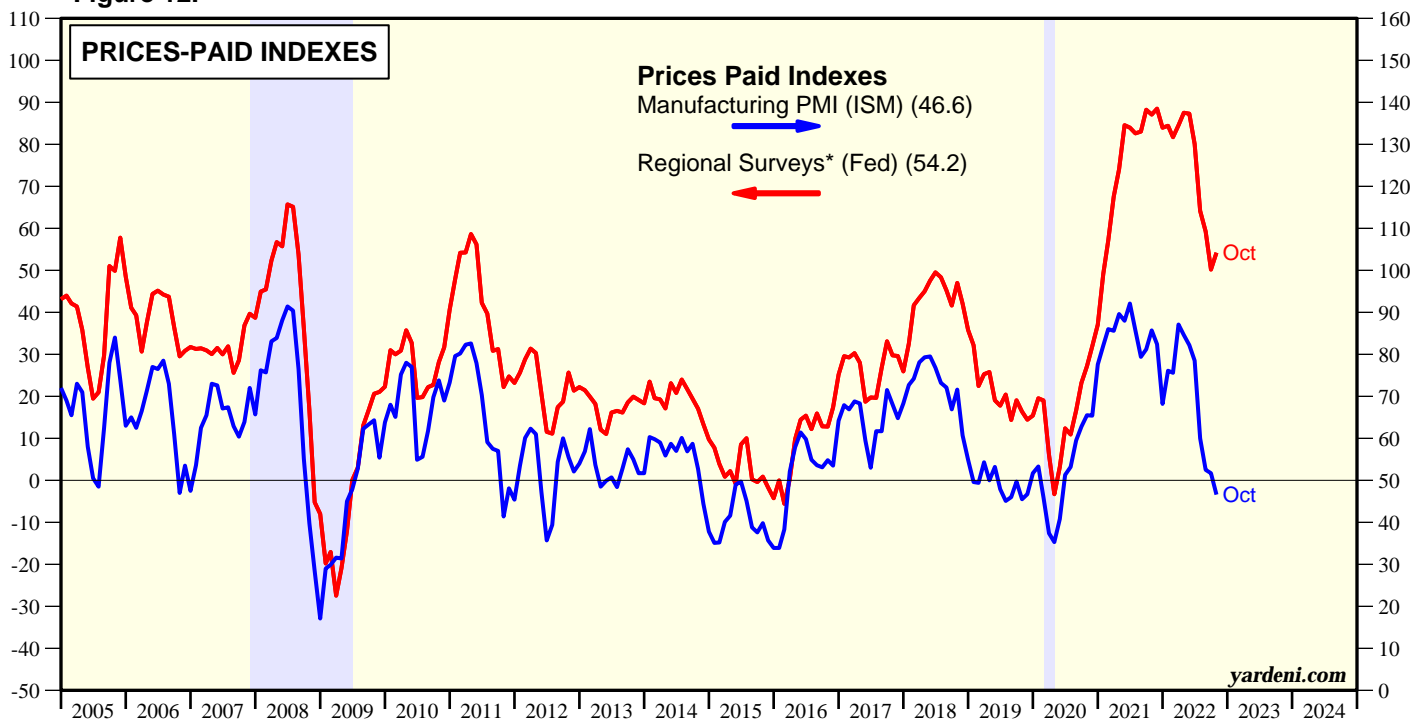
* Four-week moving average in cents per gallon.
Source: Bureau of Labor Statistics, Energy Information Administration, and Haver Analytics.

Figure 11.



Source: CME Group and Haver Analytics.

Figure 12.

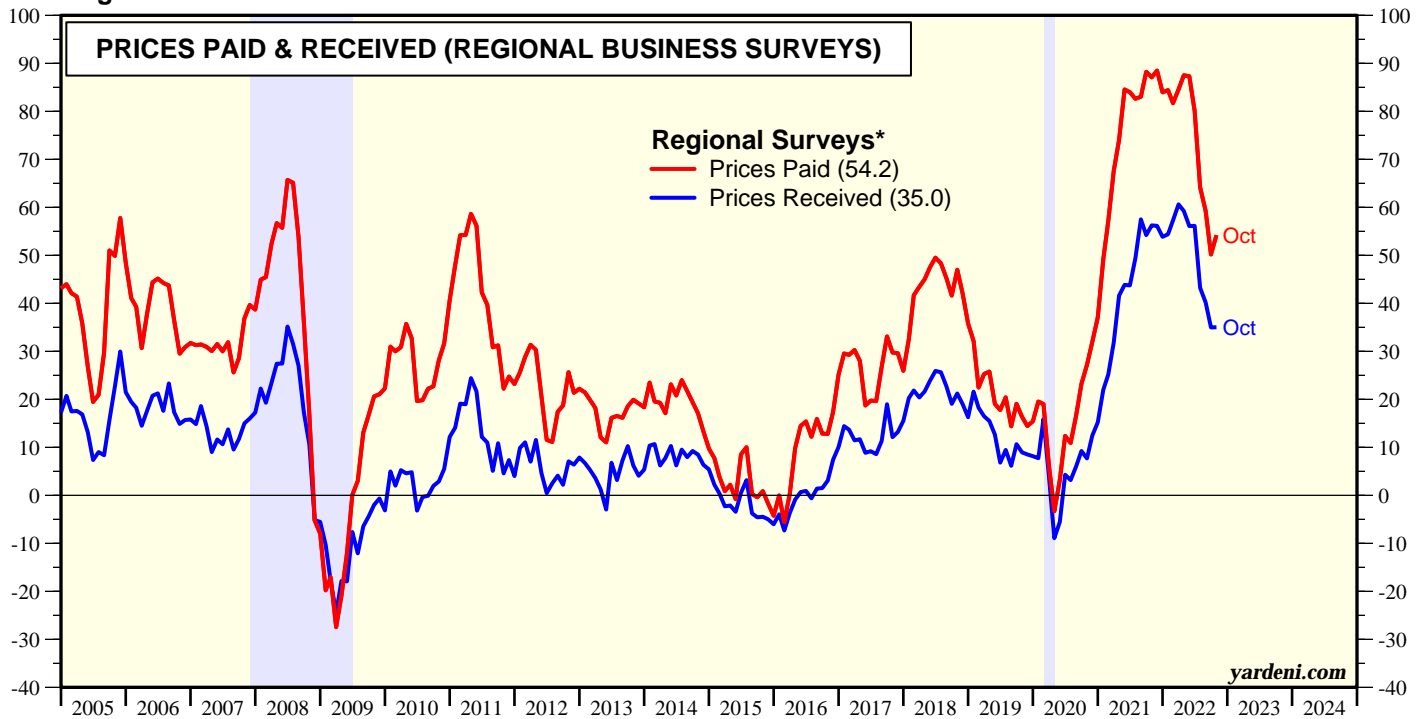


* Average of prices paid in surveys conducted by Dallas, Kansas City, New York, Philly, and Richmond Fed district banks. Richmond prices are not diffusion indexes, but rather average annualized inflation rates. They are multiplied by 10 in this chart for easier comparisons to other regional diffusion indexes.

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

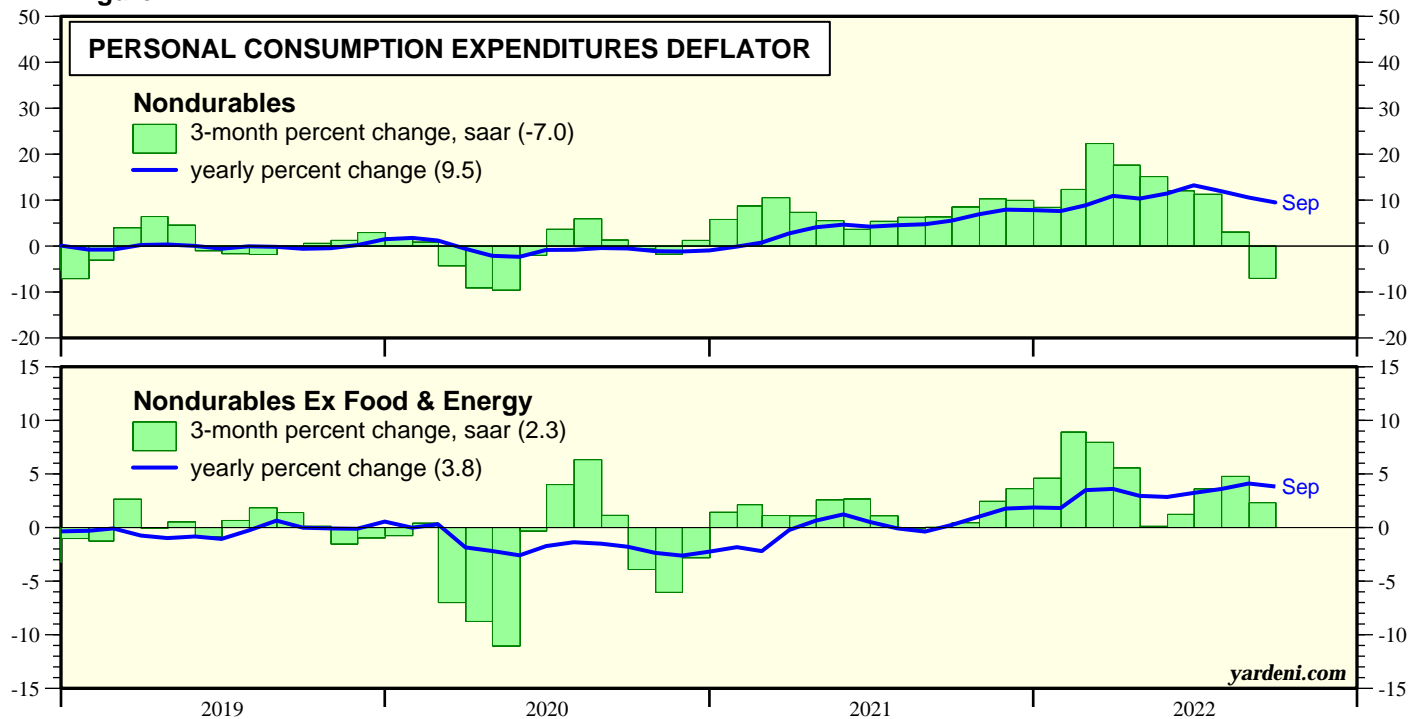
Source: Institute for Supply Management, Federal Reserve Banks of Dallas, Kansas City, New York, Philadelphia, and Richmond.

Figure 13.



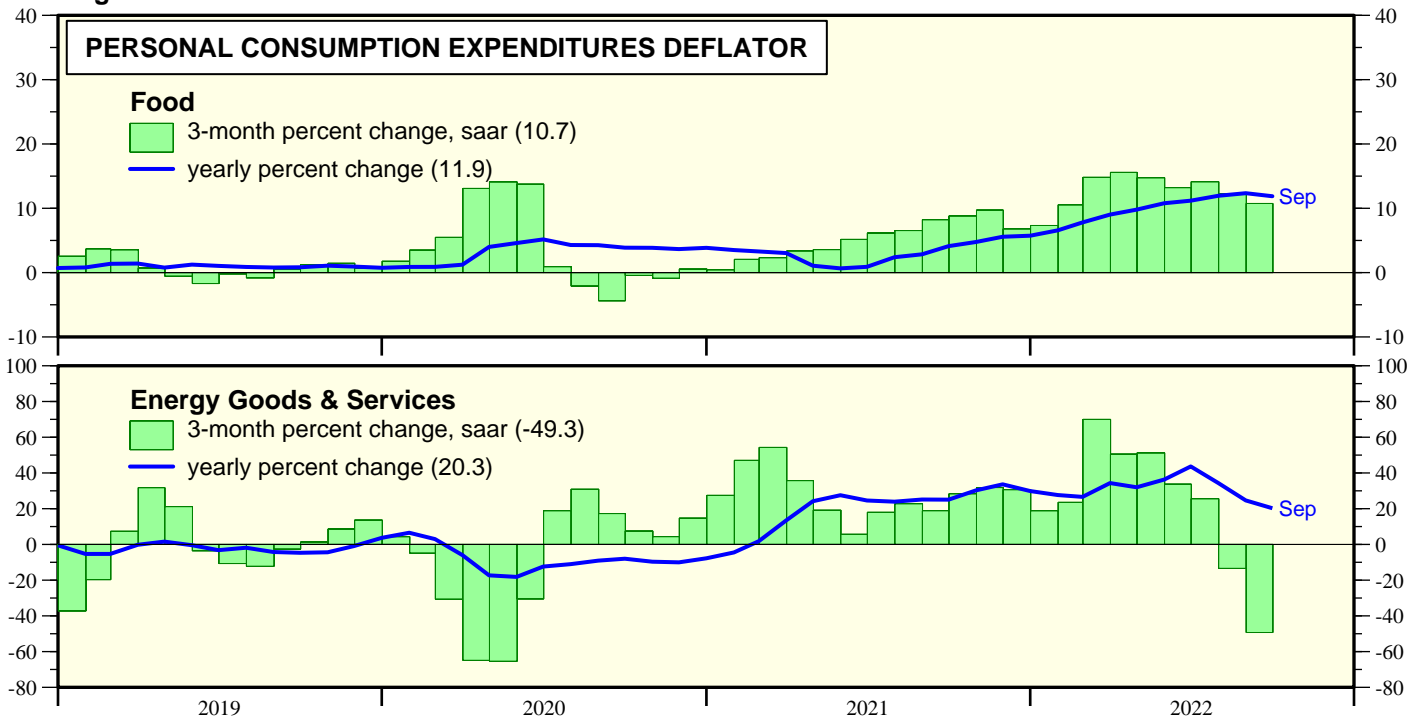
* Average of prices paid and received in surveys conducted by Dallas, Kansas City, New York, Philly, and Richmond Fed district banks. Richmond prices are not diffusion indexes, but rather average annualized inflation rates. They are multiplied by 10 in this chart for easier comparisons to other regional diffusion indexes.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Federal Reserve Banks of Dallas, Kansas City, New York, Philadelphia, and Richmond.

Figure 14.



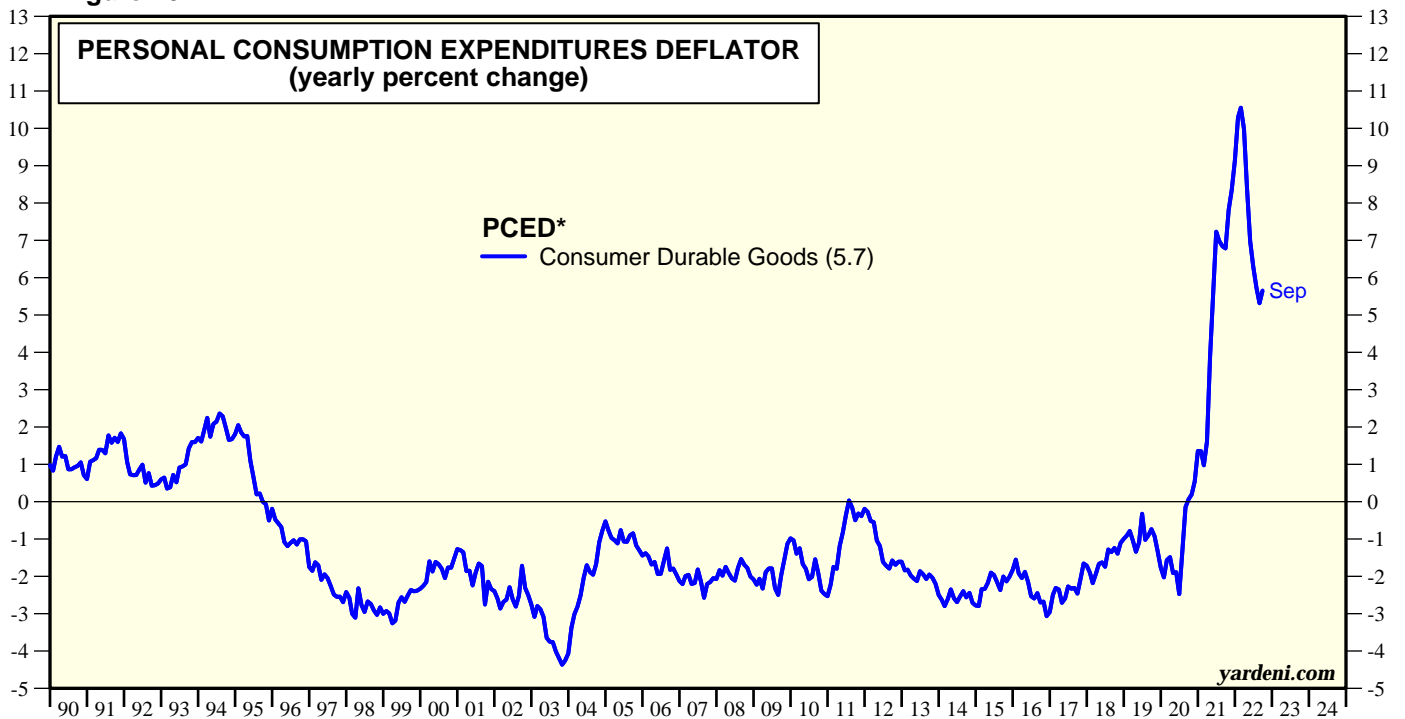
Source: Bureau of Economic Analysis.

Figure 15.



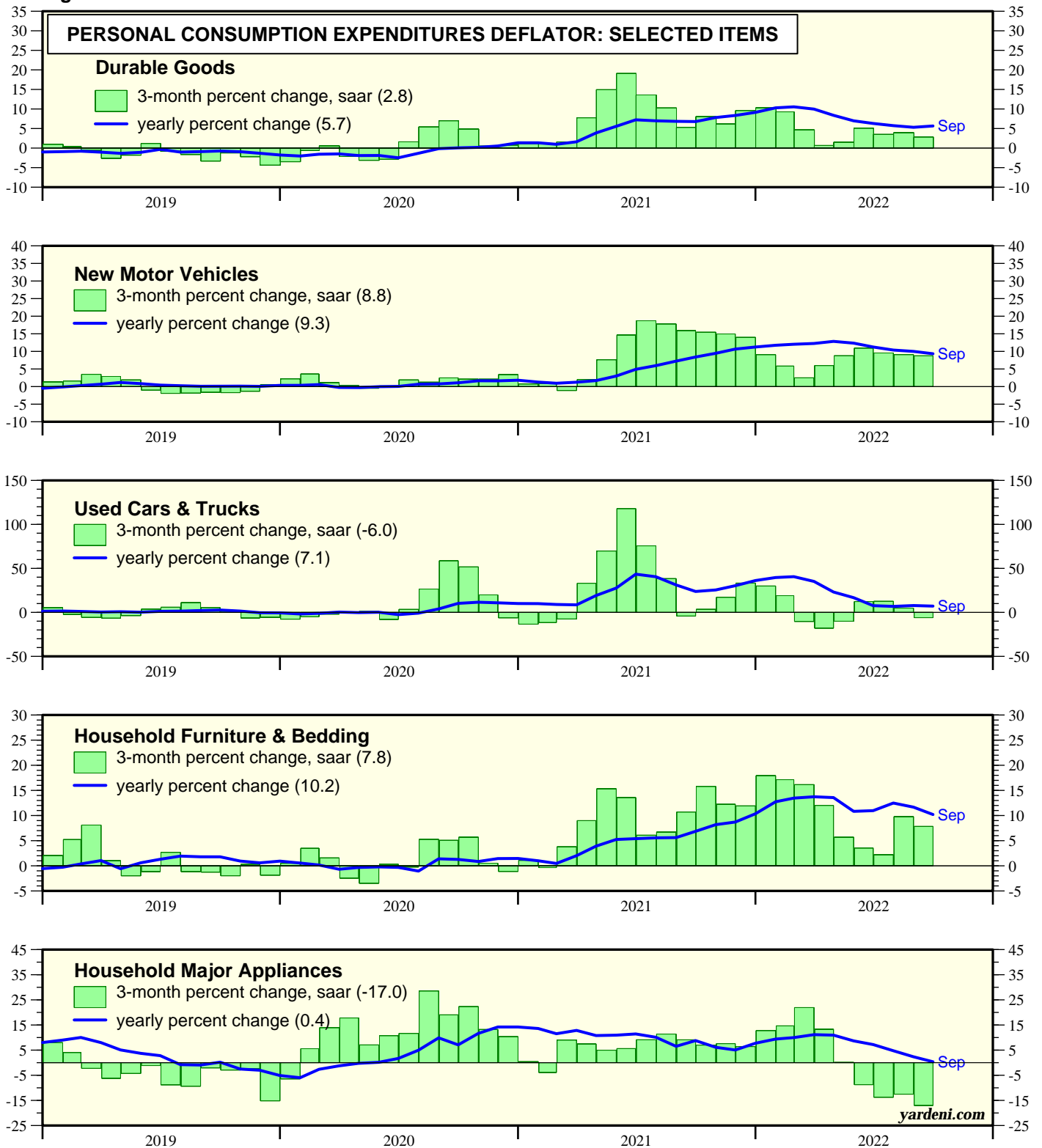
Source: Bureau of Economic Analysis.

Figure 16.



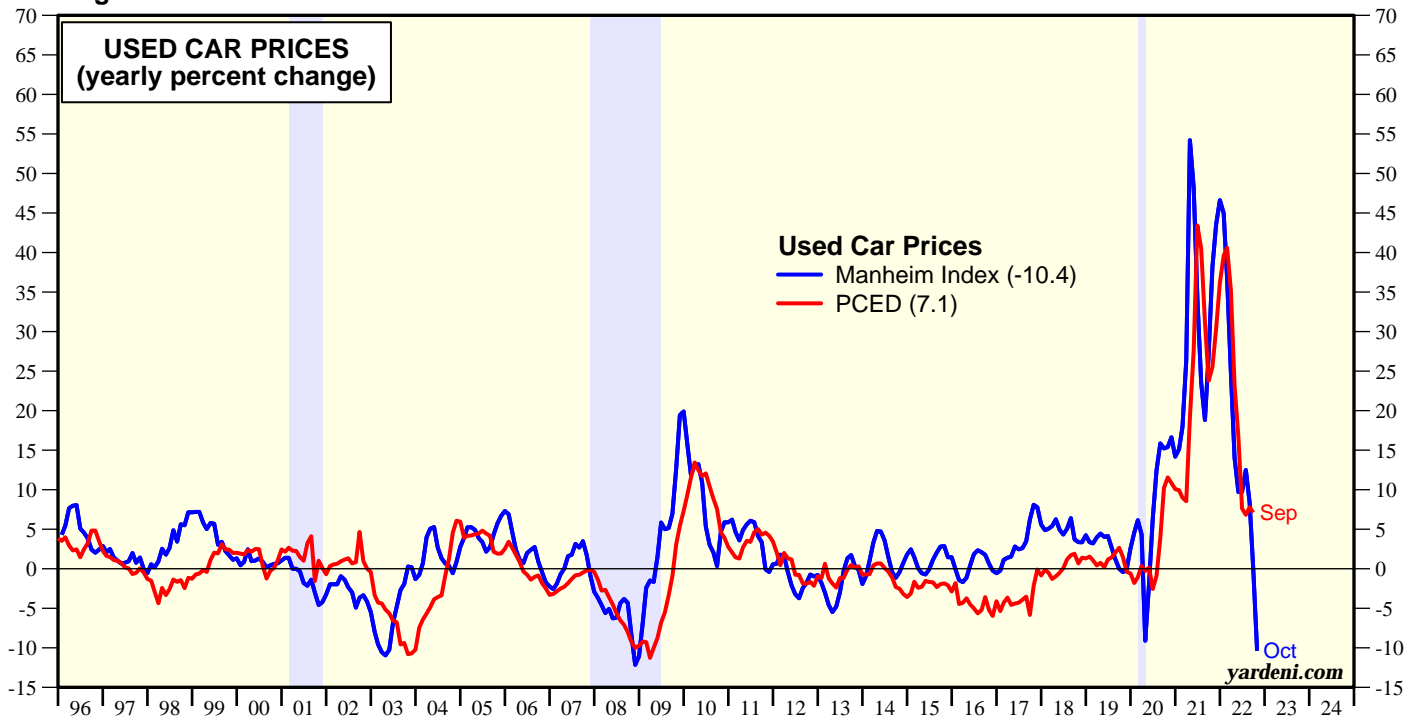
* Personal consumption expenditures deflator.
 Source: Bureau of Economic Analysis.

Figure 17.



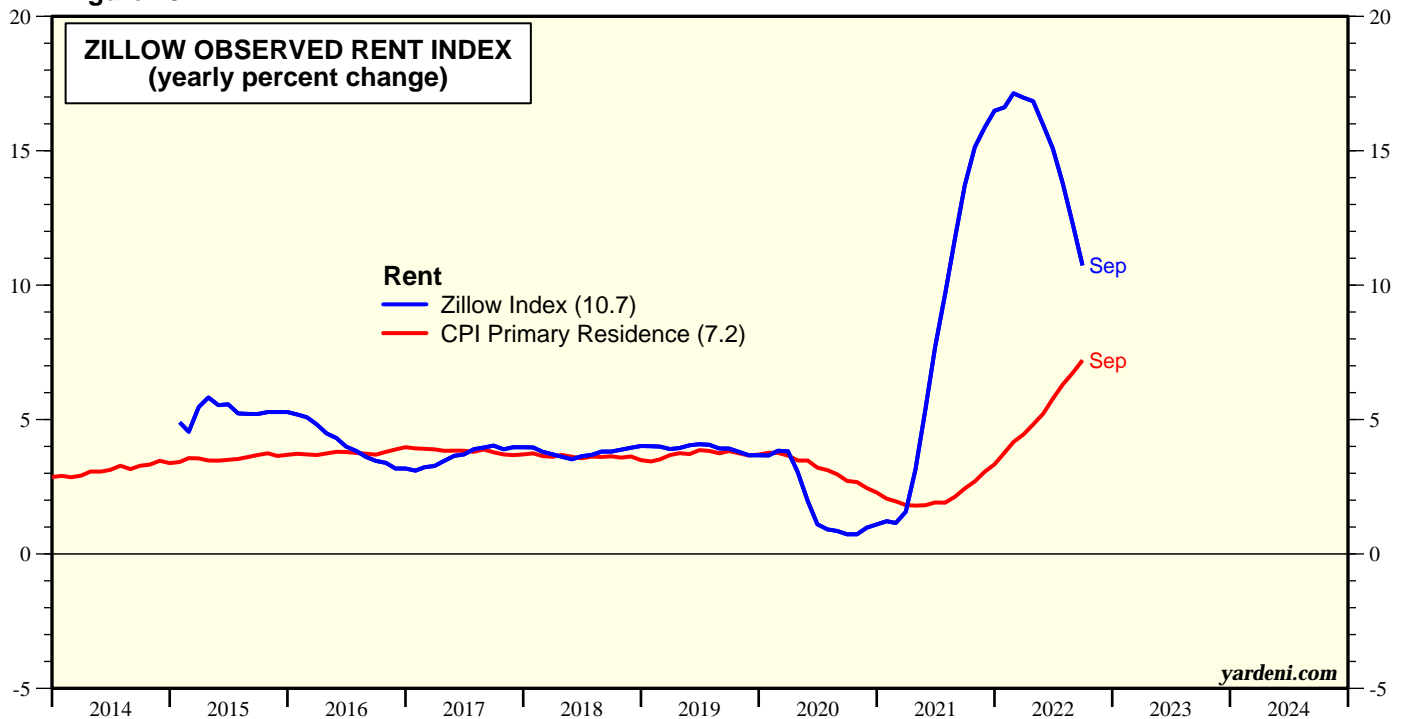
Source: Bureau of Economic Analysis.

Figure 18.



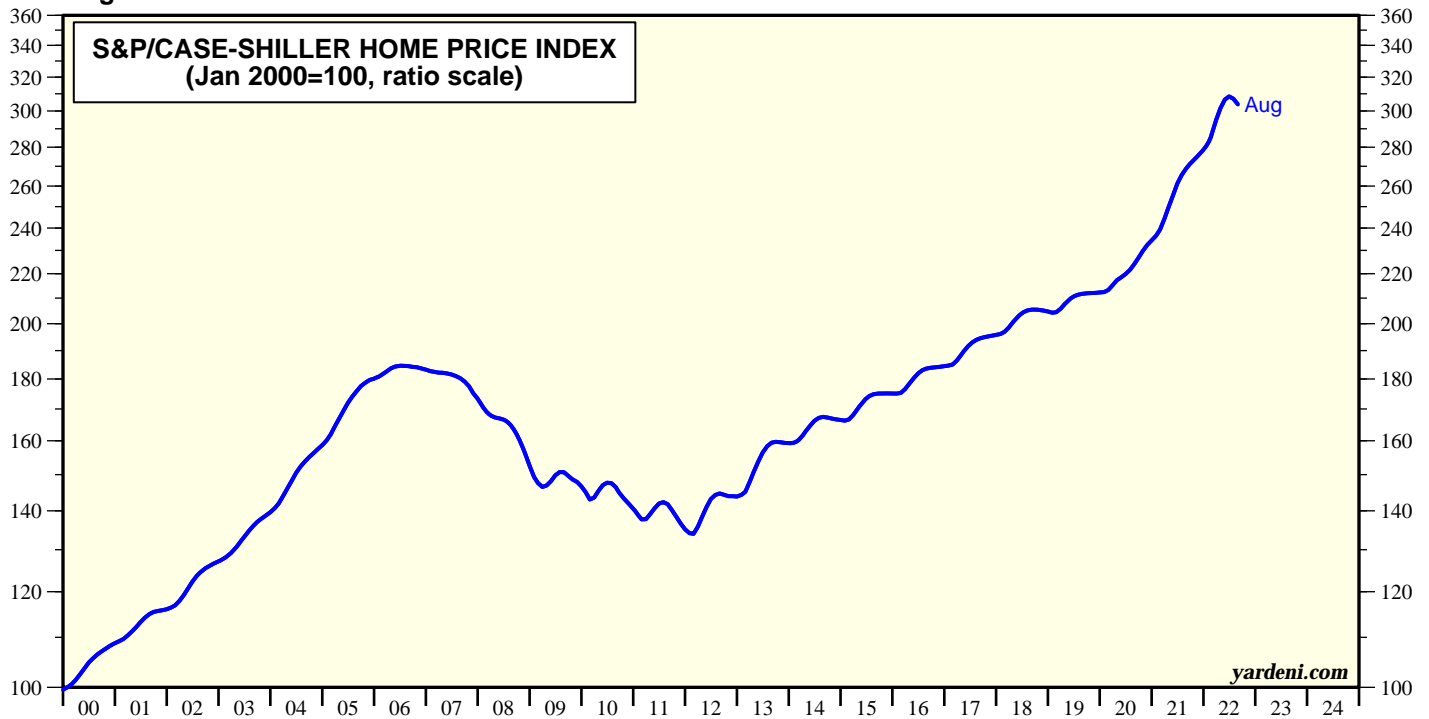
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Manheim, Bureau of Labor Statistics and Haver Analytics.

Figure 19.



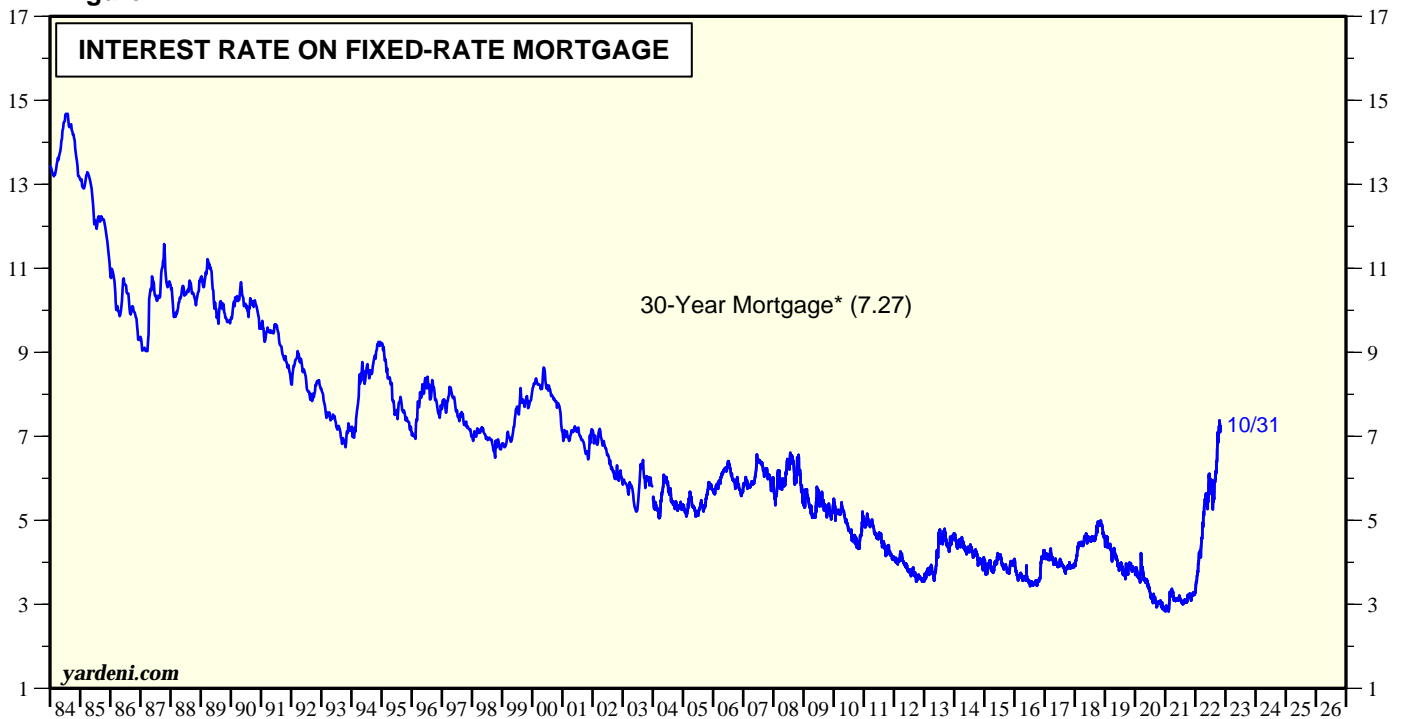
Source: Zillow and Haver Analytics.

Figure 20.



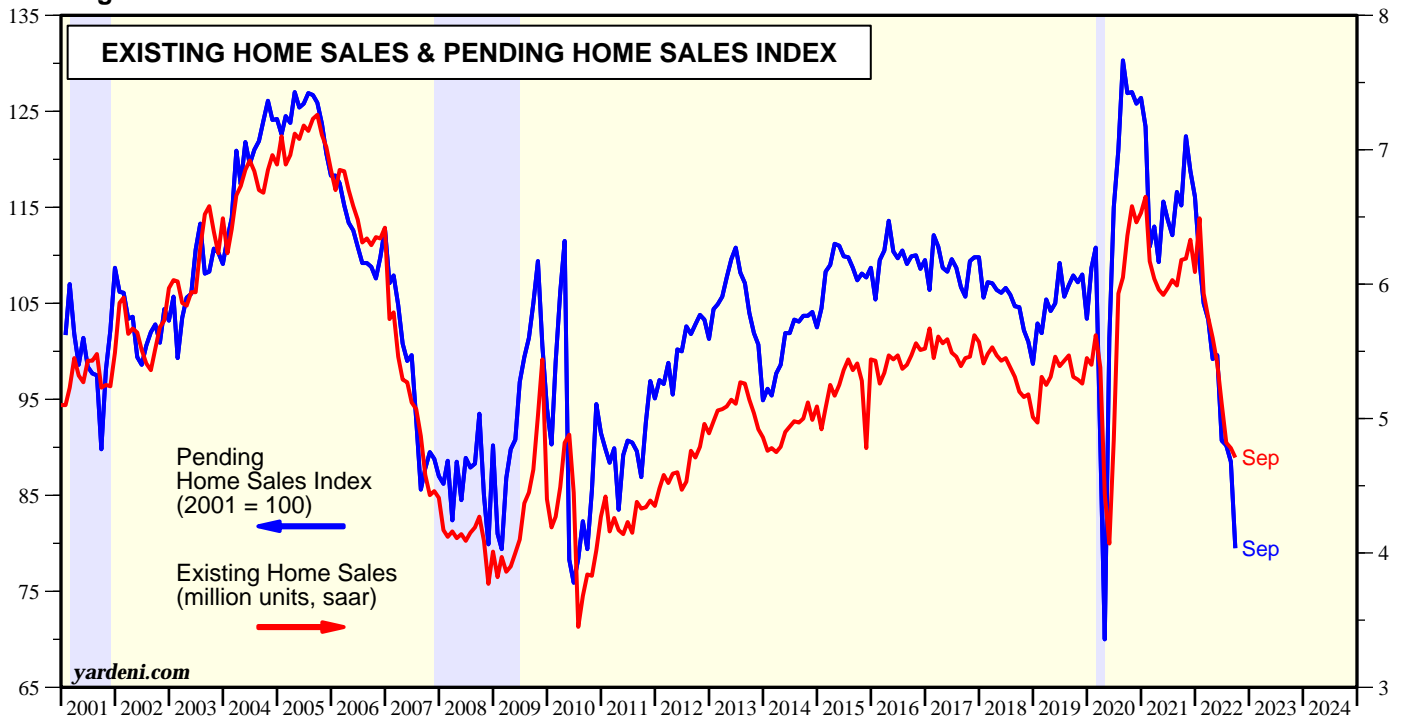
Source: Haver Analytics.

Figure 21.



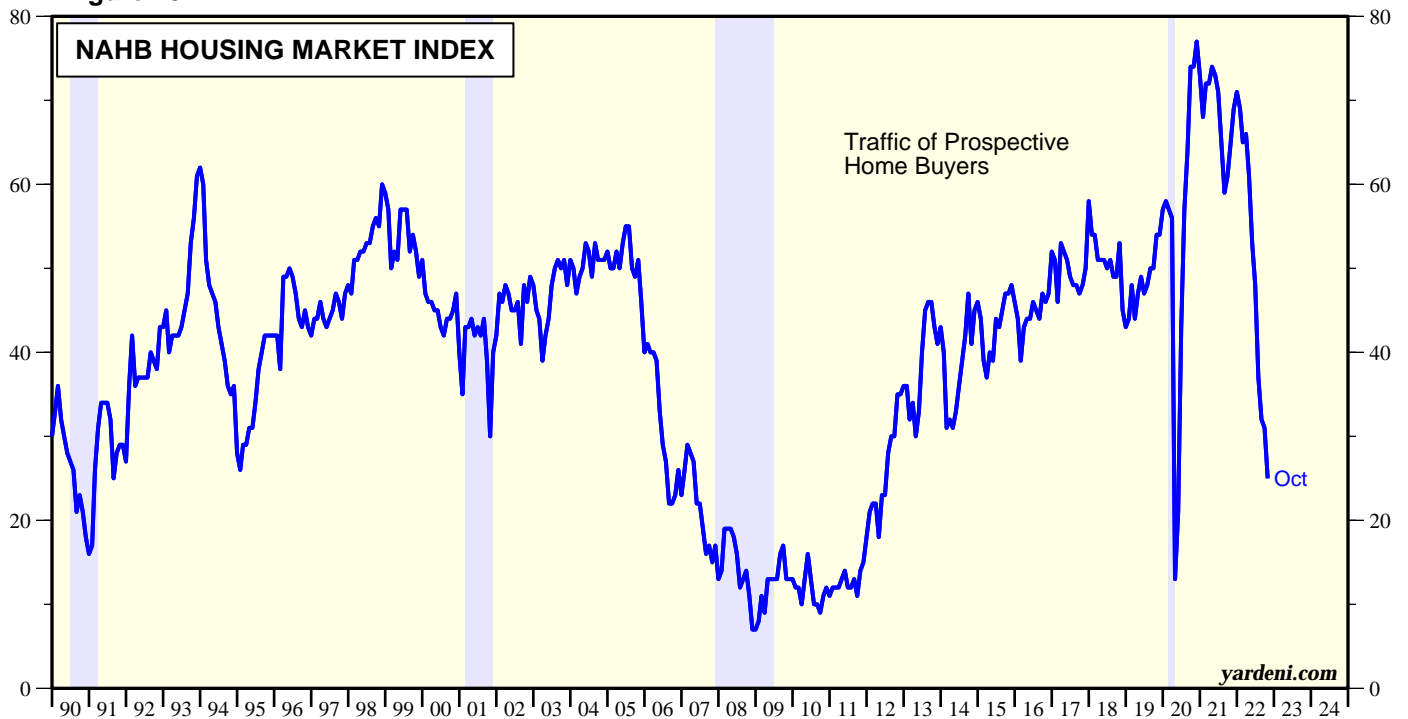
* Average conventional 30-year commitment rate. Weekly data thru December 2003, daily thereafter.
Source: FHLMC Primary Mortgage Market Survey.

Figure 22.



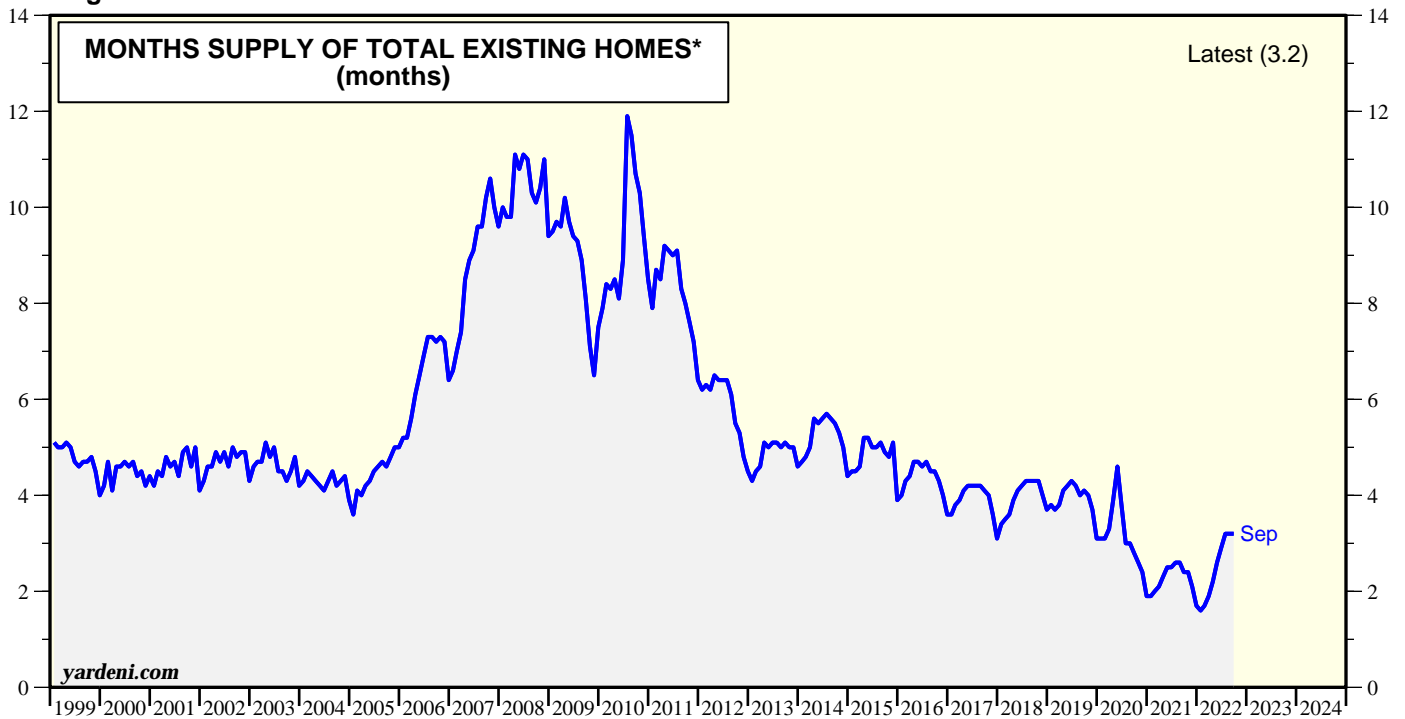
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: National Association of Realtors.

Figure 23.



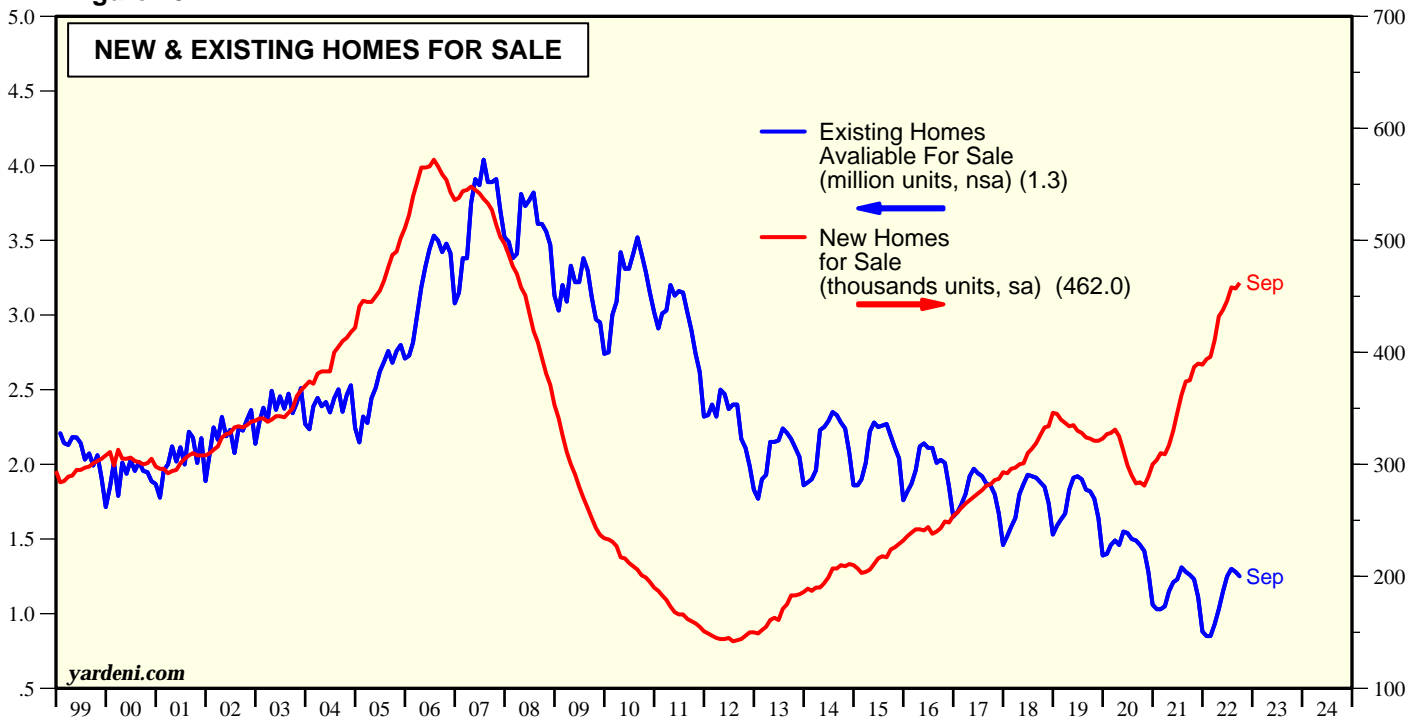
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: National Association of Home Builders.

Figure 24.



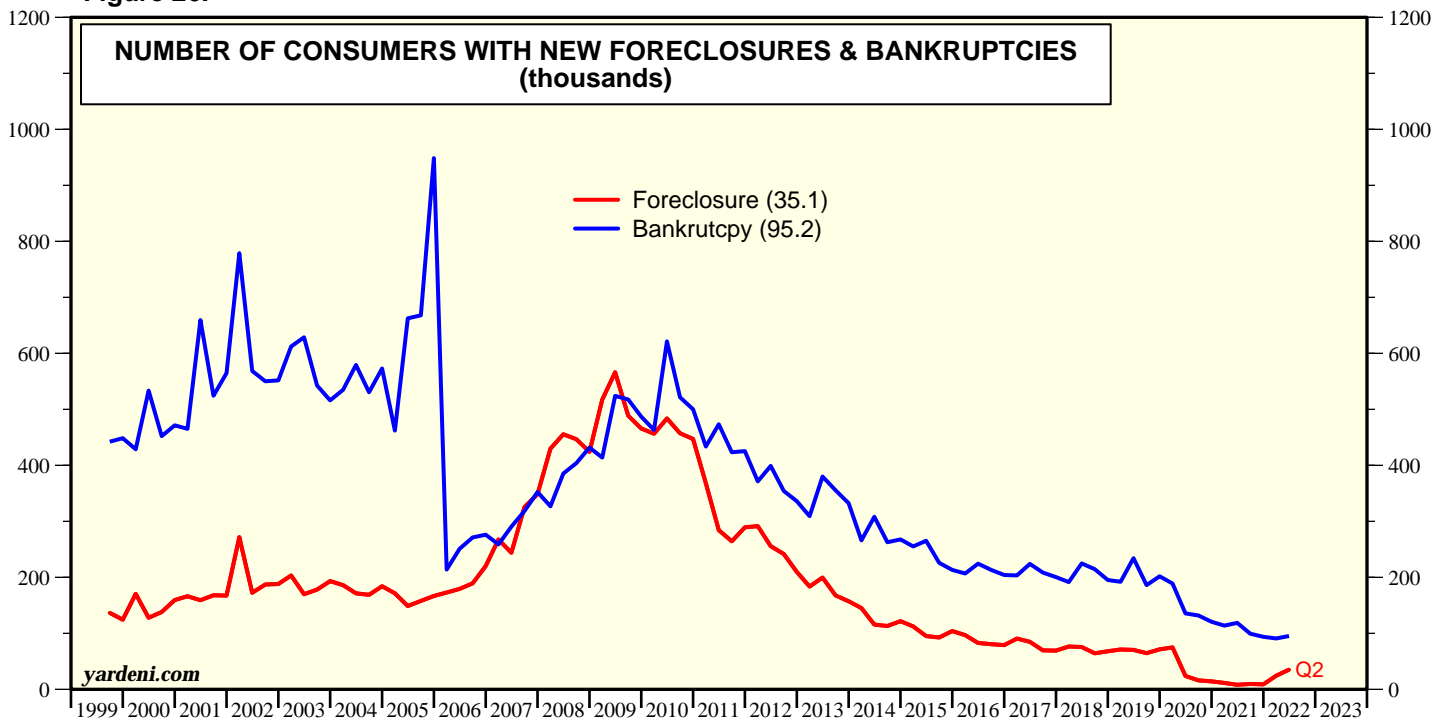
* Ratio of existing single-family homes for sale to existing single-family homes sold.
Source: National Association of Realtors.

Figure 25.



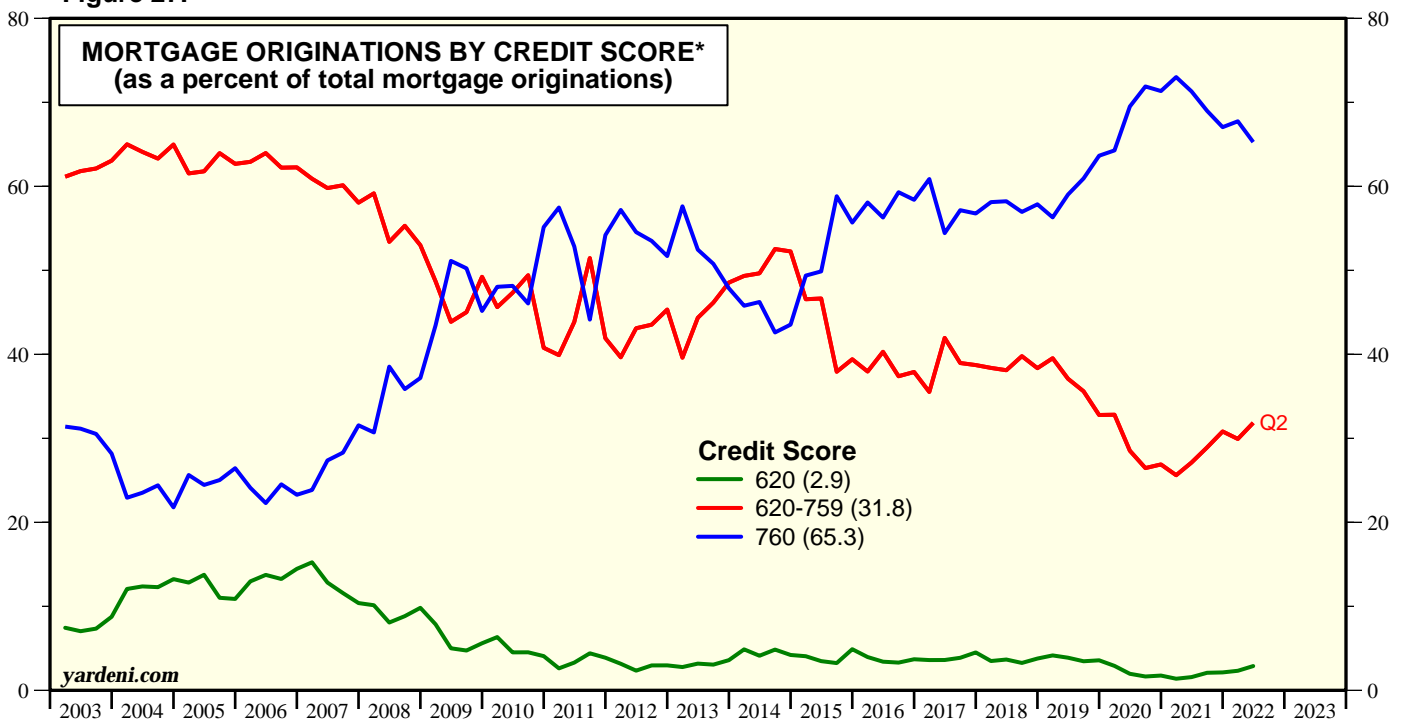
Source: National Association of Realtors and Census Bureau.

Figure 26.



Source: New York Fed Credit Panel.

Figure 27.



* Credit score is Equifax Riskscore 3.0.
Source: New York Fed Credit Panel.

Figure 28.

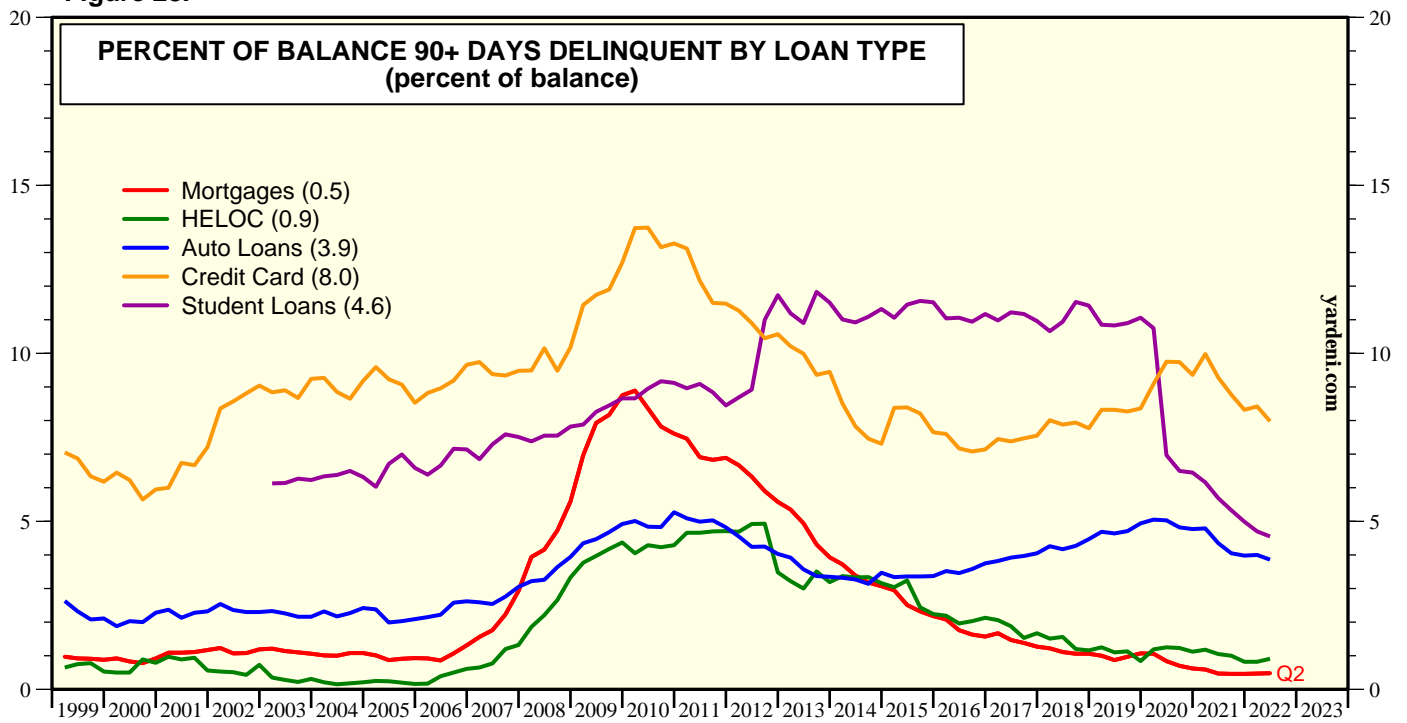
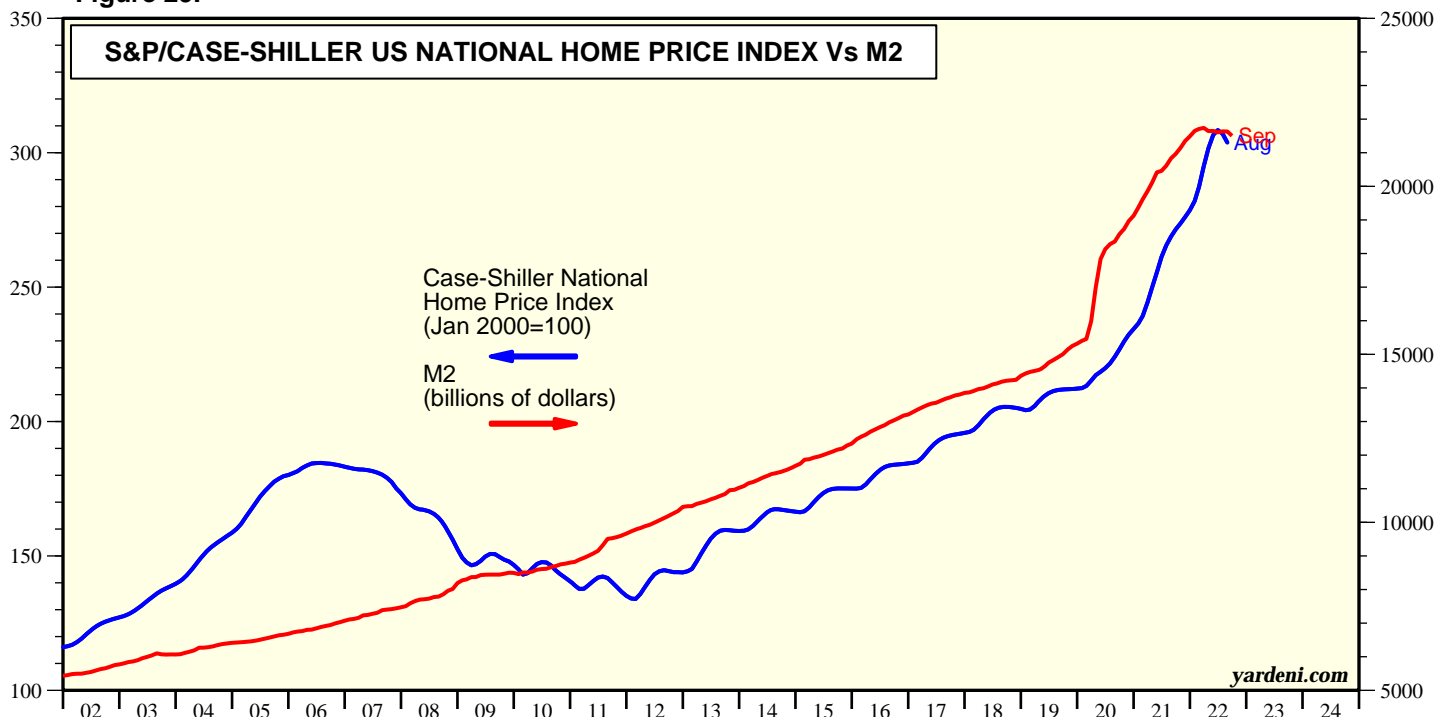


Figure 29.



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