

Chart Collection for Morning Briefing

Yardeni Research, Inc.

November 21, 2022

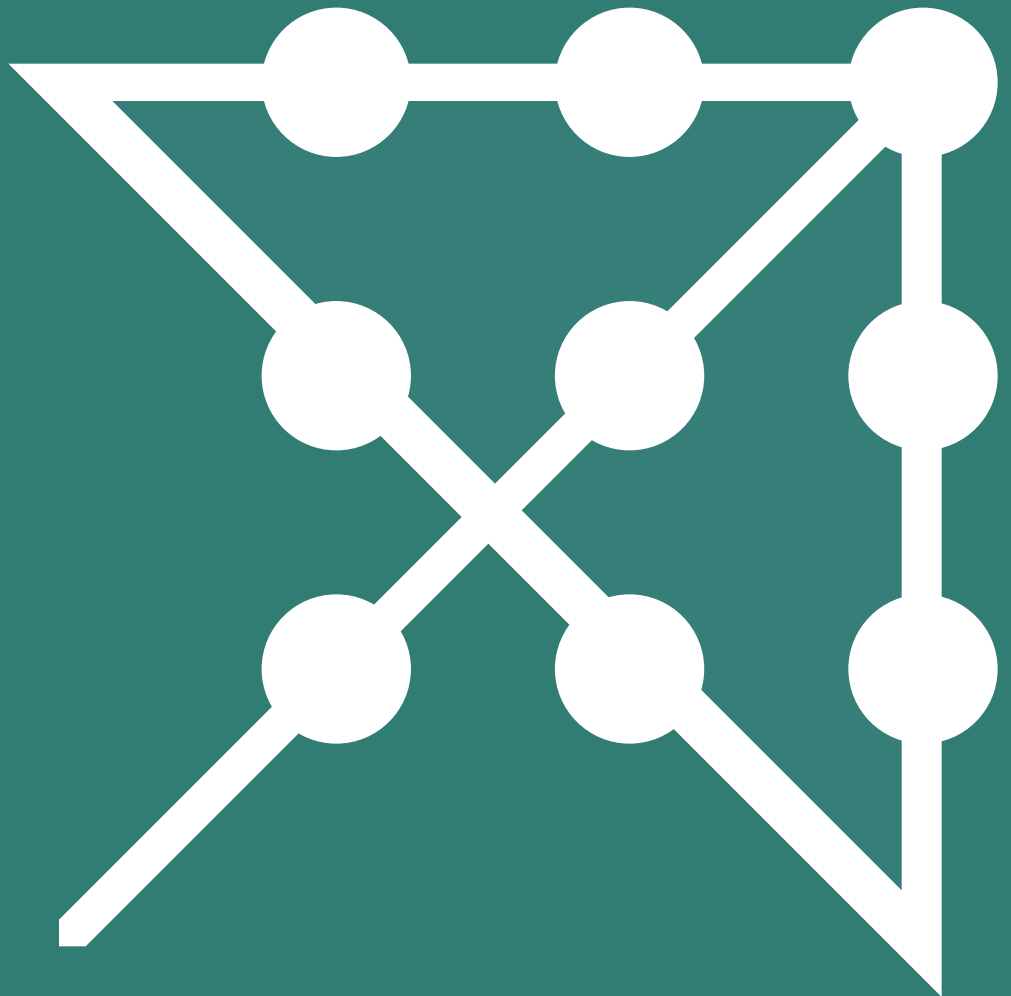
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Mali Quintana

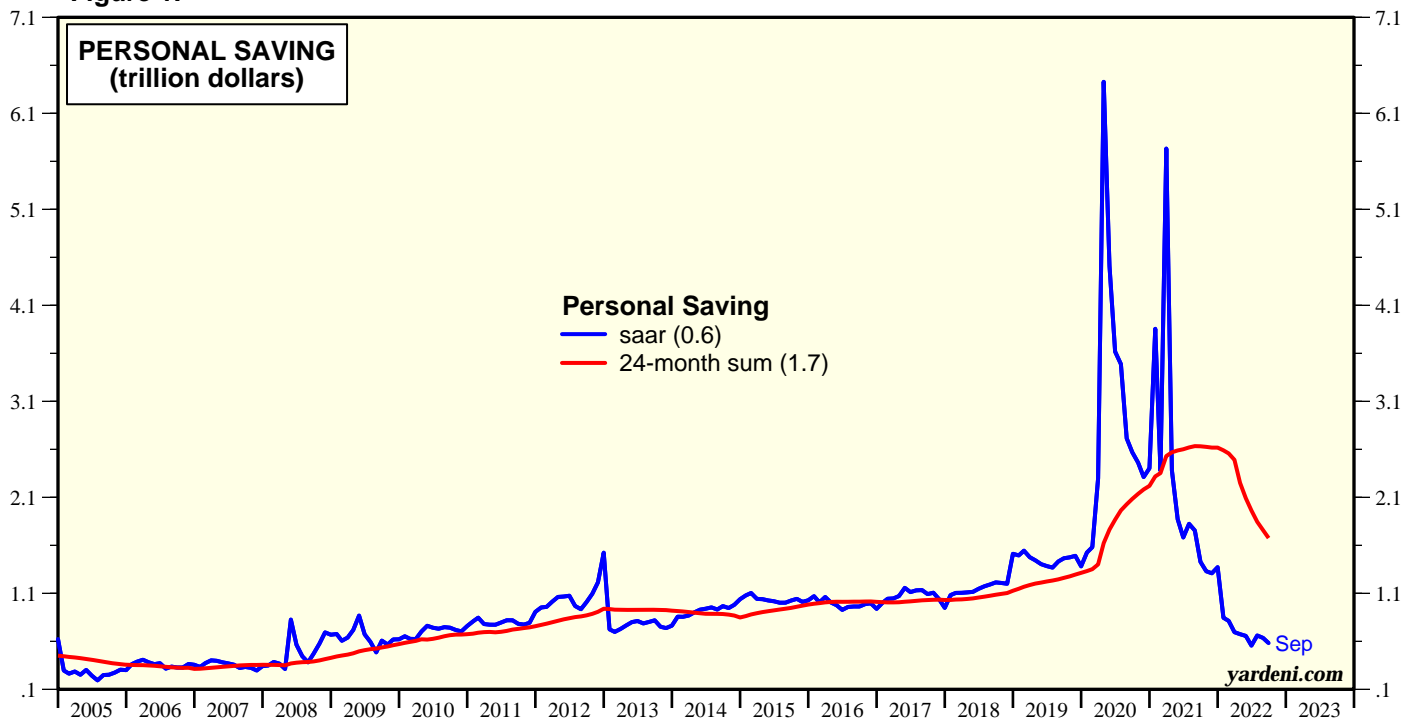
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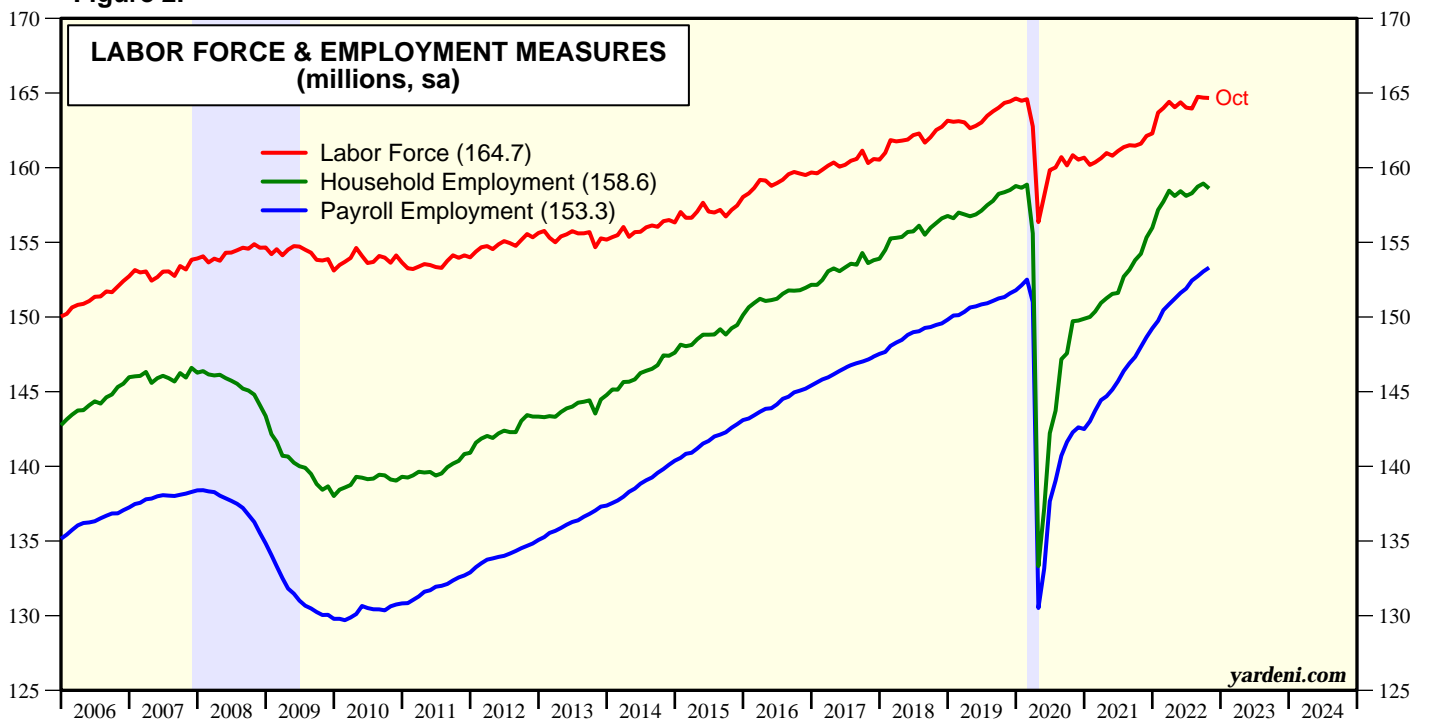
thinking outside the box

Figure 1.



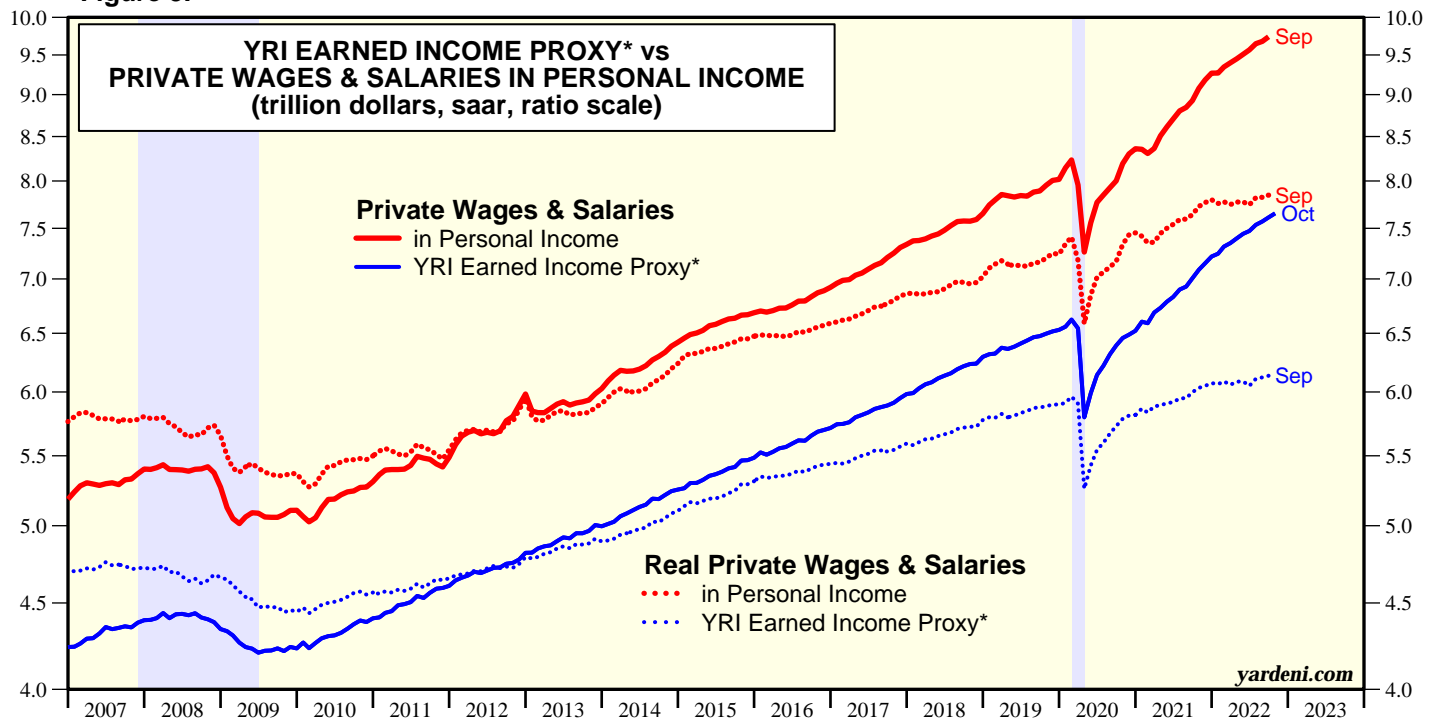
Source: Bureau of Economic Analysis.

Figure 2.



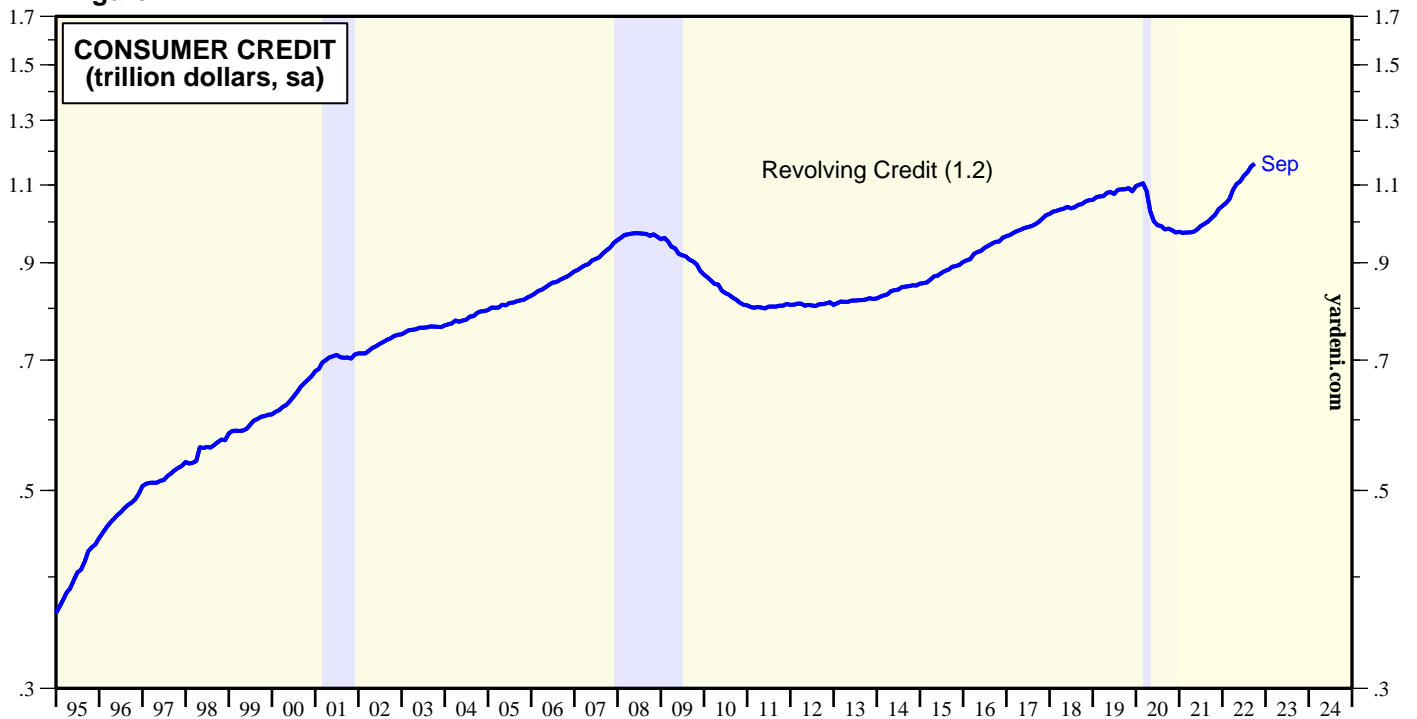
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Bureau of Labor Statistics.

Figure 3.



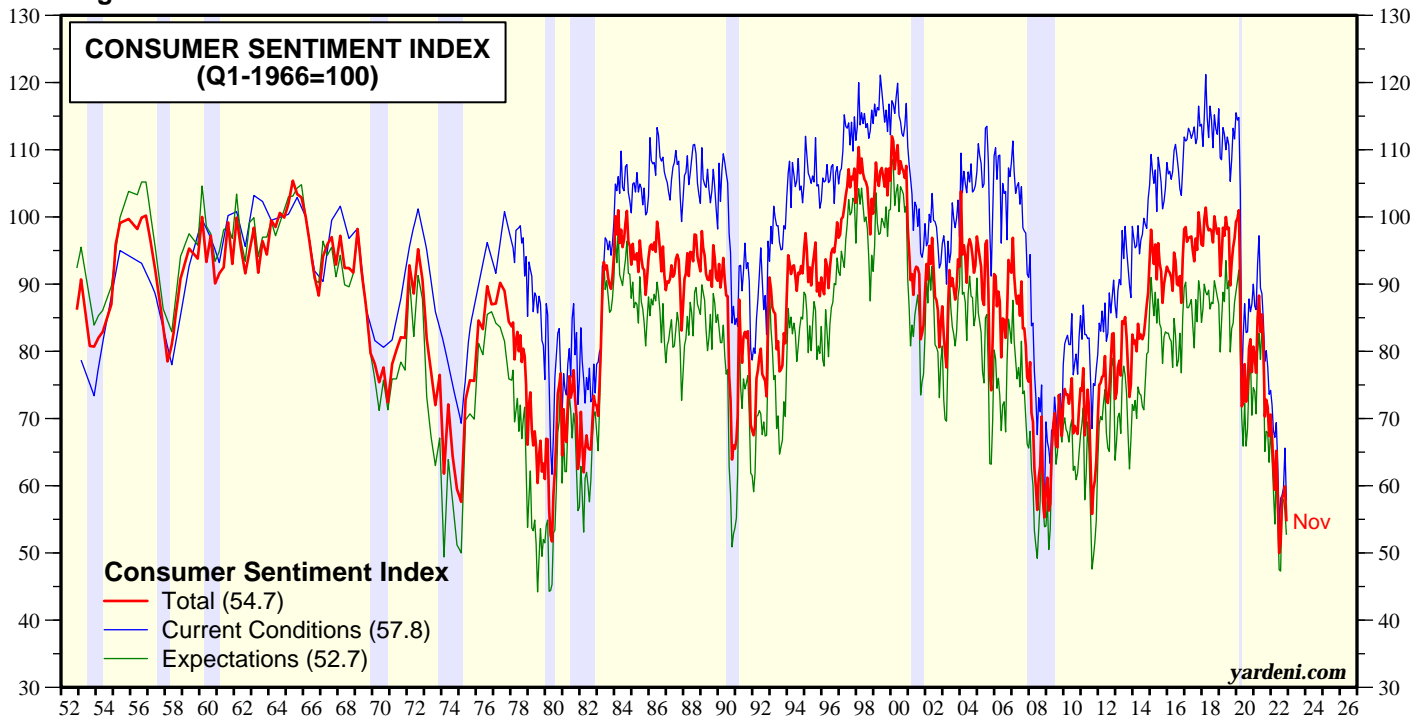
* Aggregate weekly hours times average hourly earnings of total private industries times 52.
 Note: Real private wages and salaries deflated by headline PCED. Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Bureau of Labor Statistics and Bureau of Economic Analysis.

Figure 4.



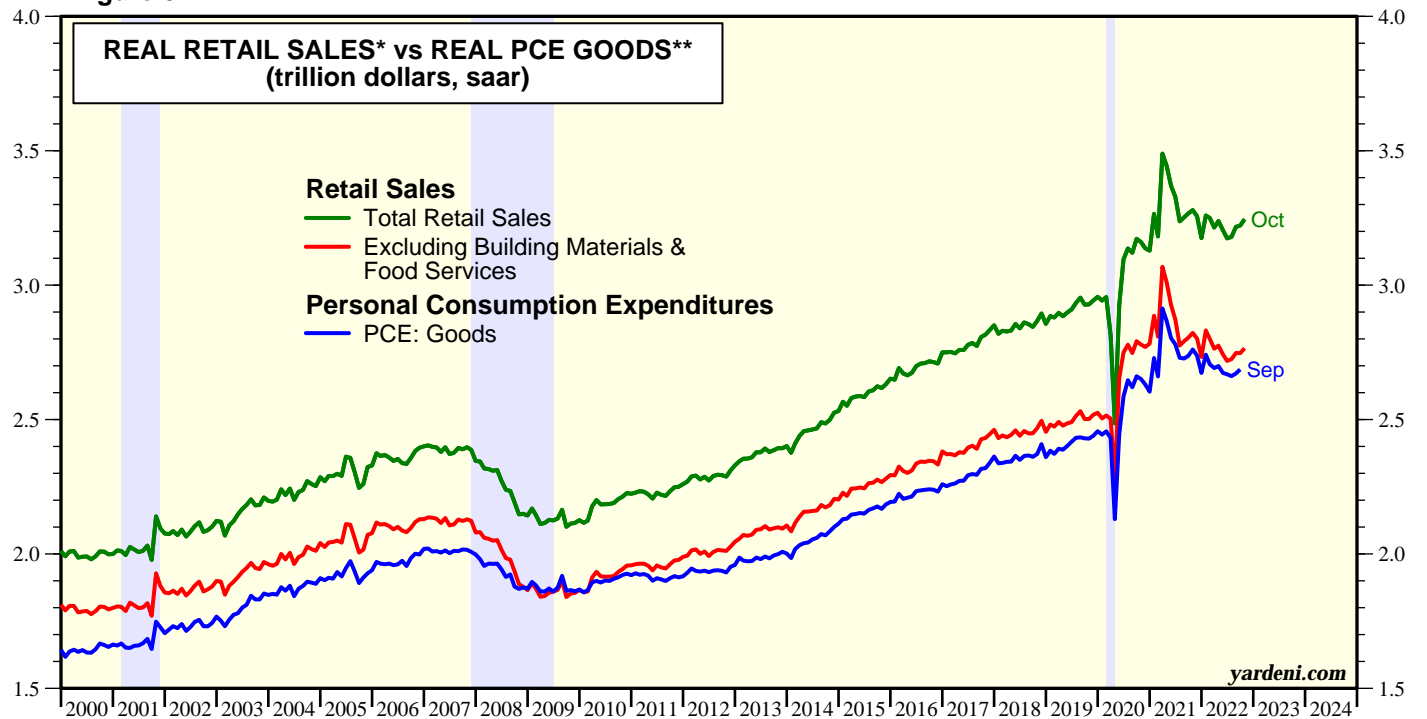
* Break-adjusted level series are calculated by Haver Analytics using the level data and the break-adjusted percent changes reported by the FRB.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Federal Reserve Board.

Figure 5.



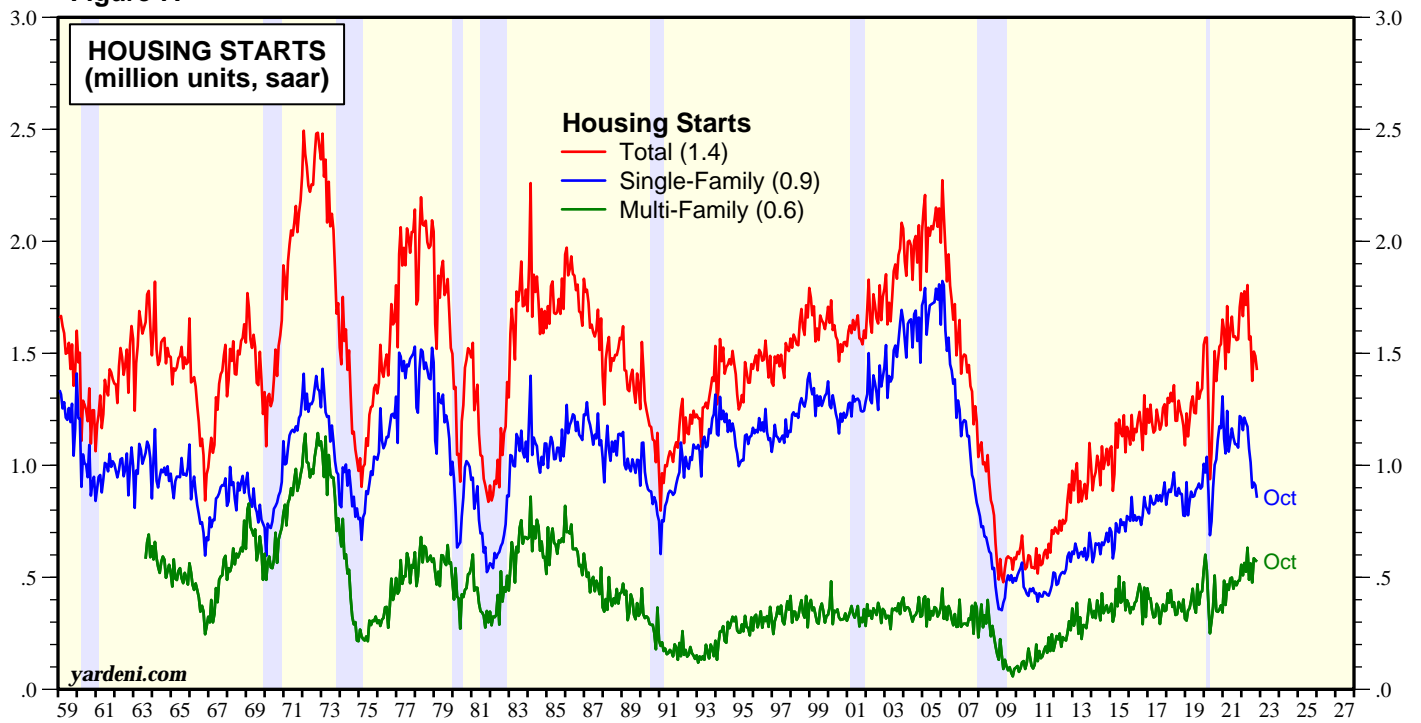
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: University of Michigan Survey Research Center

Figure 6.



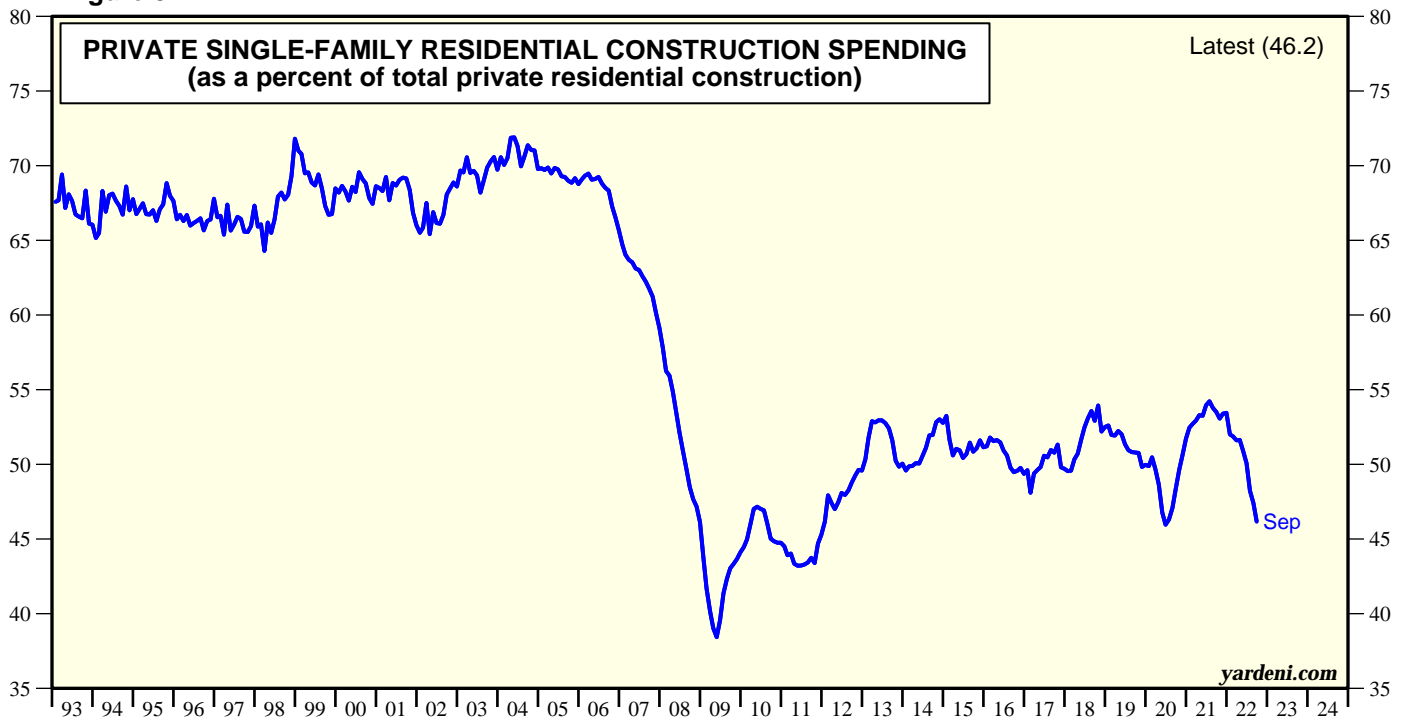
* Using CPI goods.
 ** Using PCE deflator.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Census Bureau and Bureau of Economic Analysis.

Figure 7.



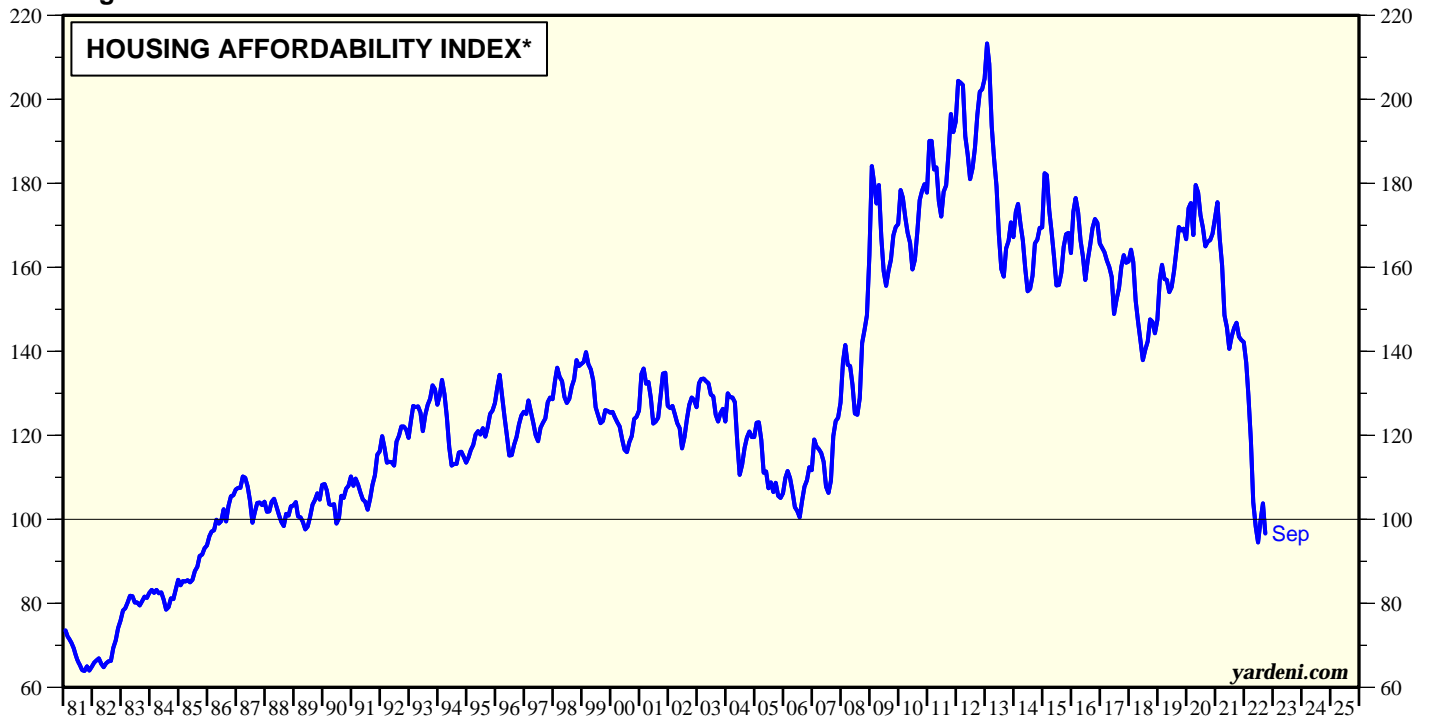
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Census Bureau.

Figure 8.



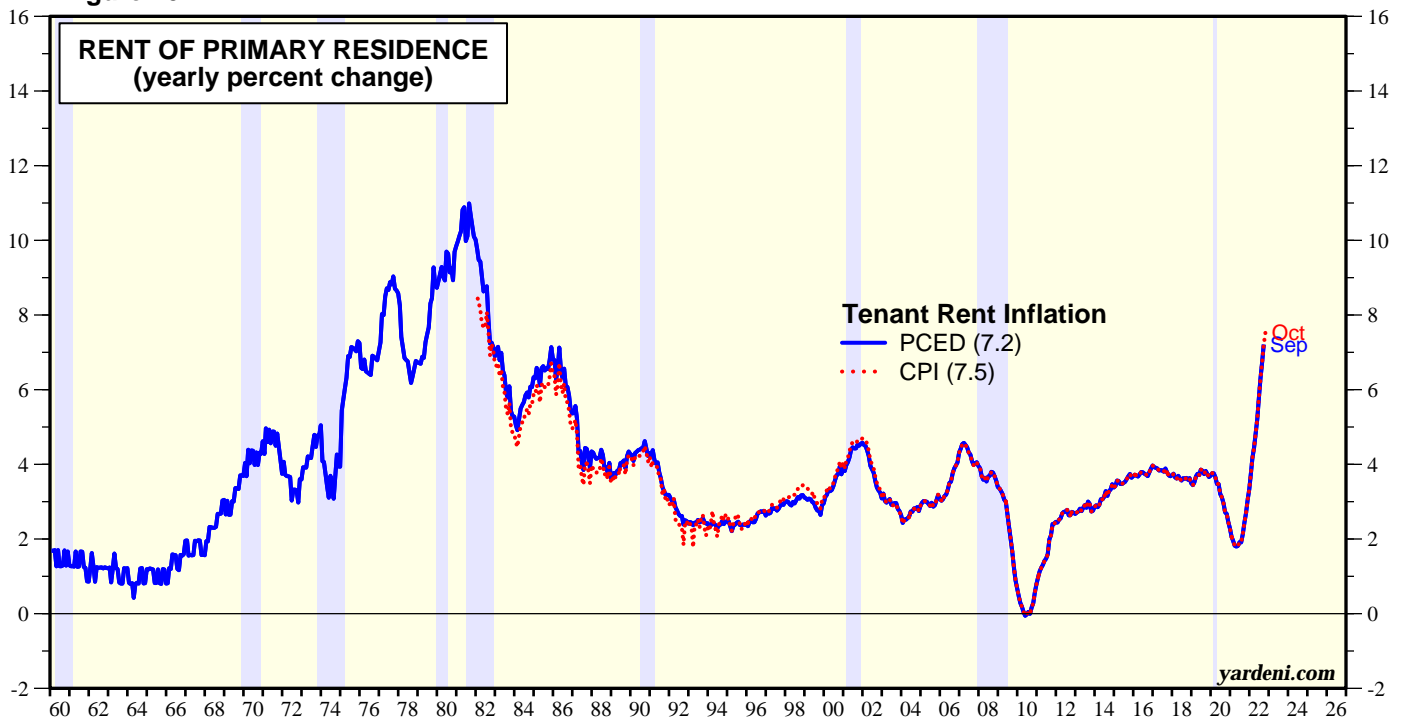
Source: Census Bureau.

Figure 9.



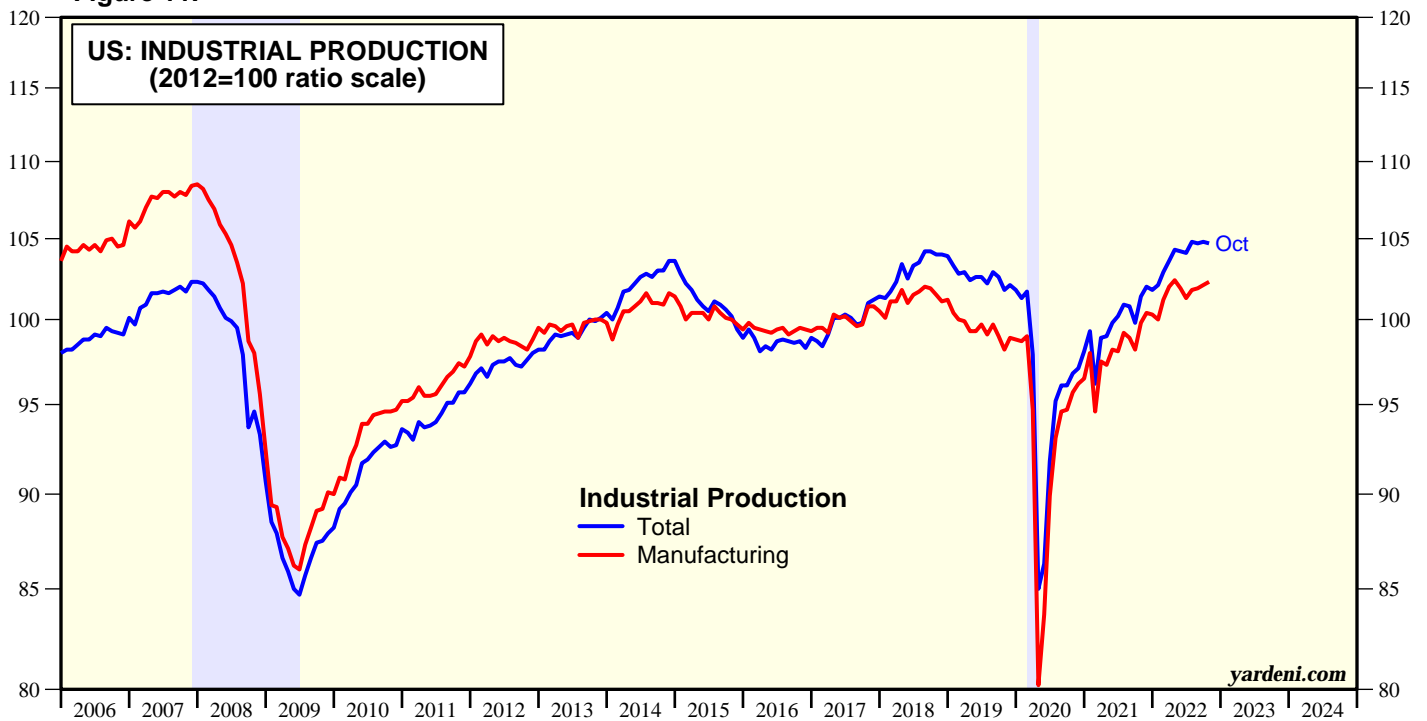
* Based on 30-year fixed rate mortgage.
Source: National Association of Realtors.

Figure 10.



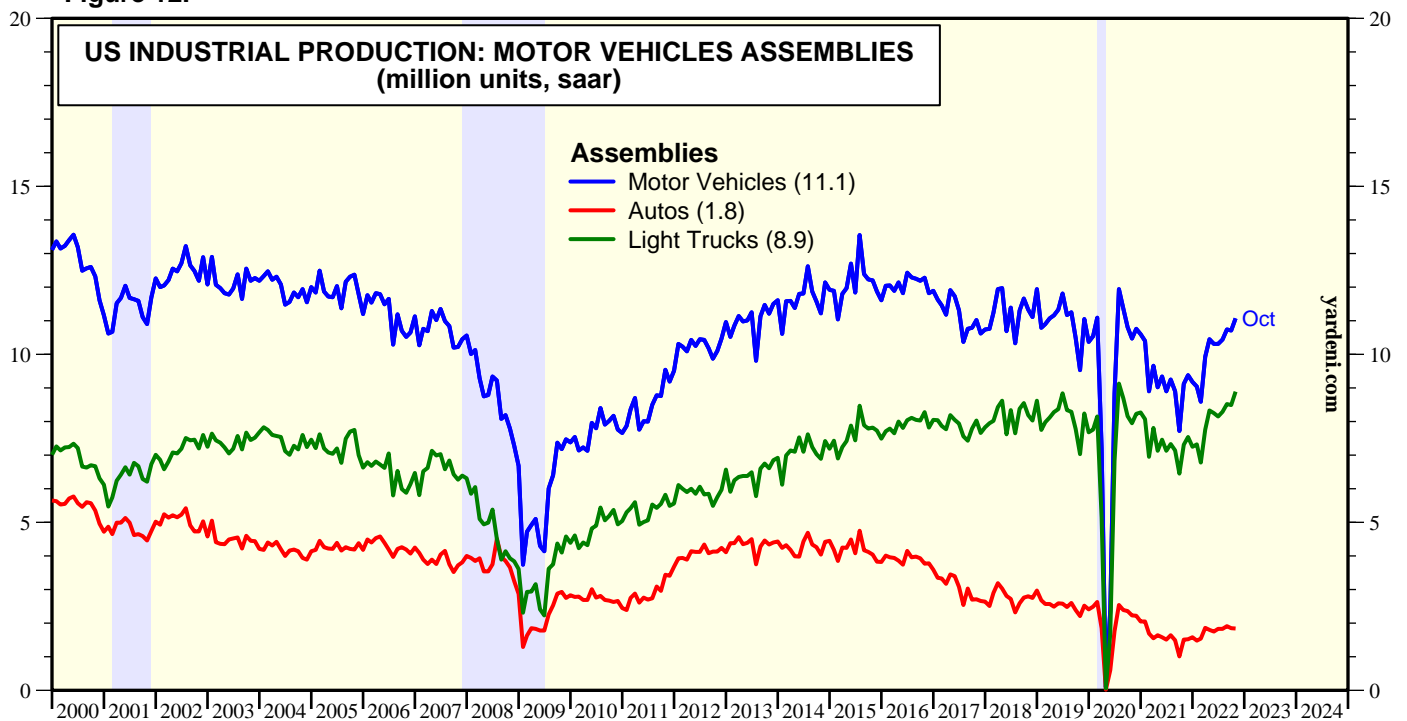
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Bureau of Economic Analysis.

Figure 11.



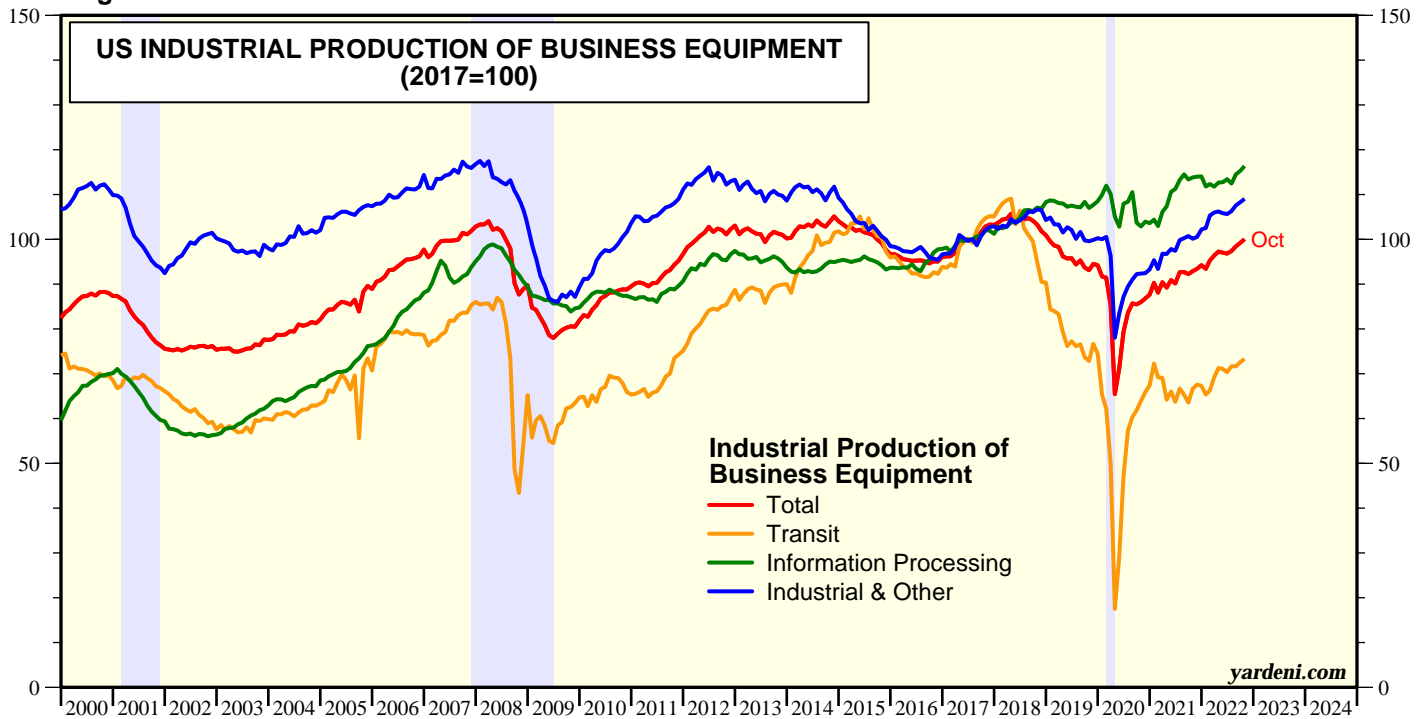
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Federal Reserve Board.

Figure 12.



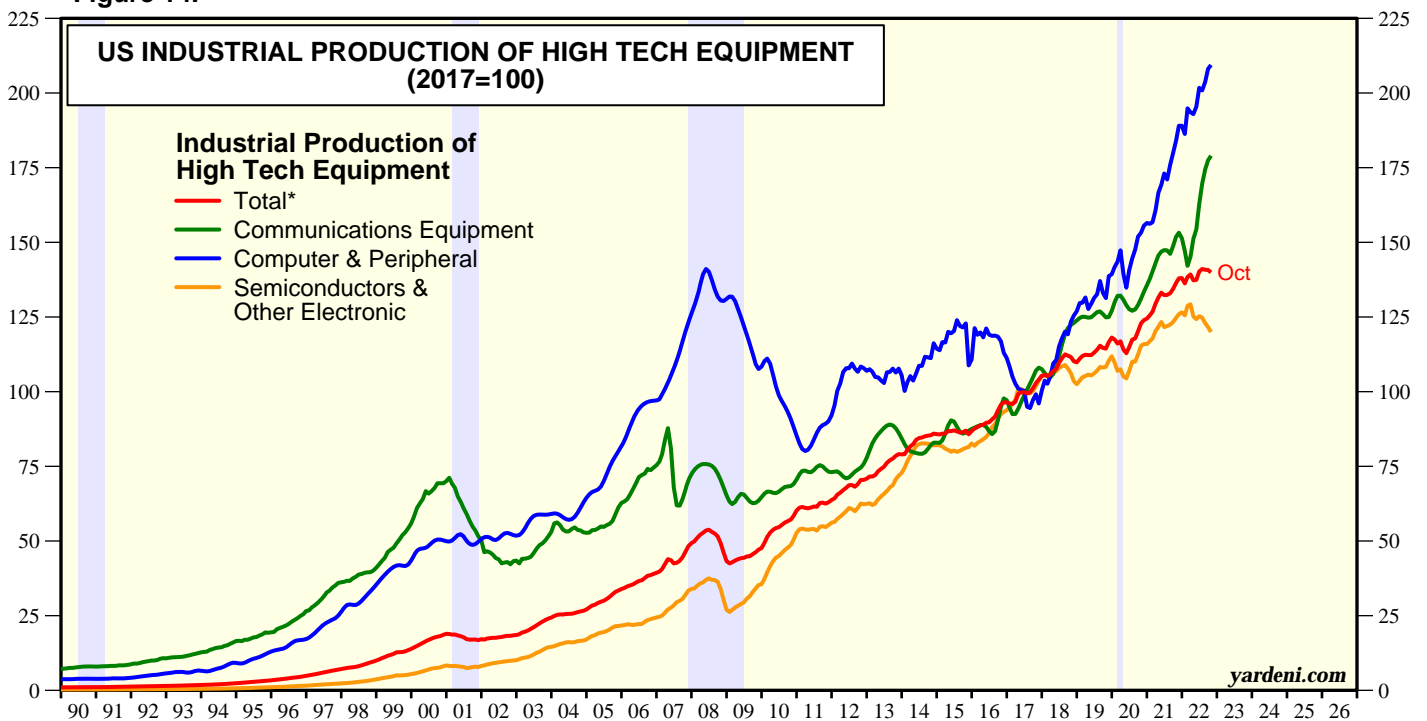
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Federal Reserve Board.

Figure 13.



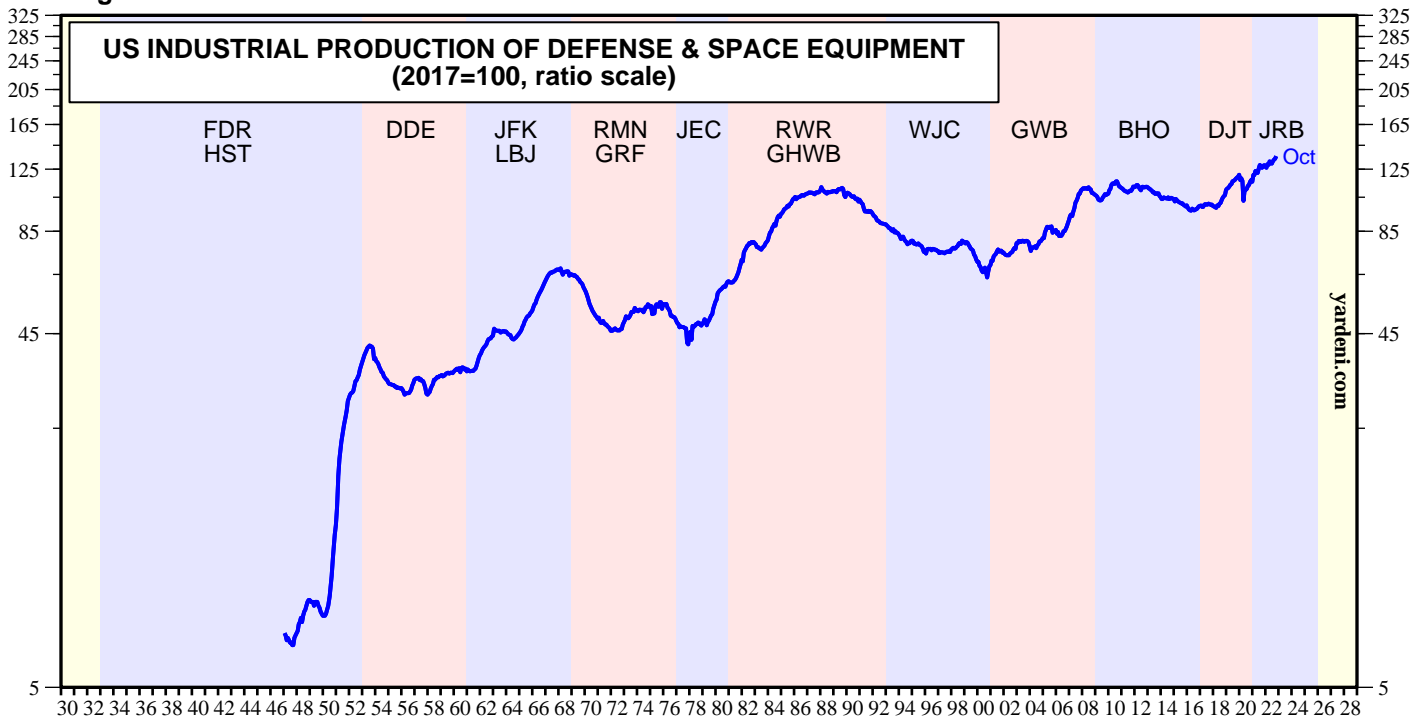
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Federal Reserve Board.

Figure 14.



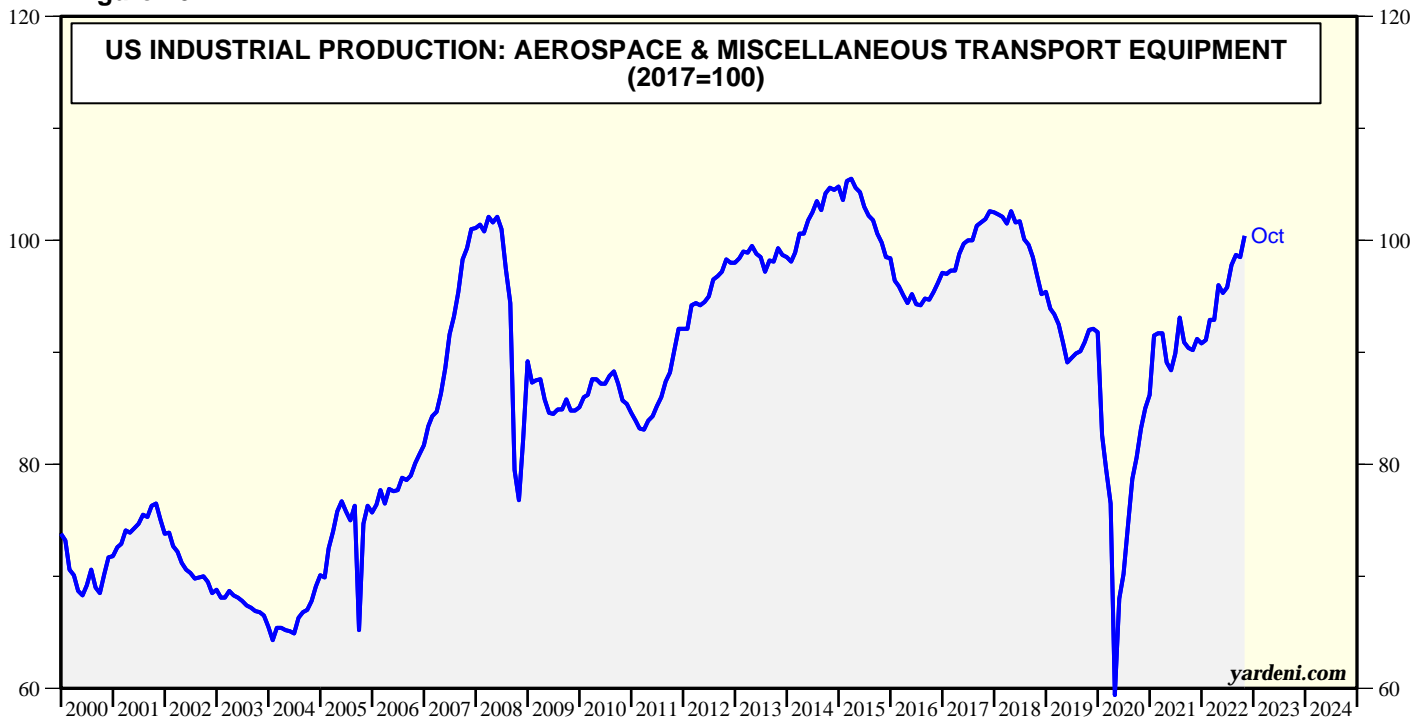
* Includes computers, communications and semiconductors.
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Federal Reserve Board.

Figure 15.



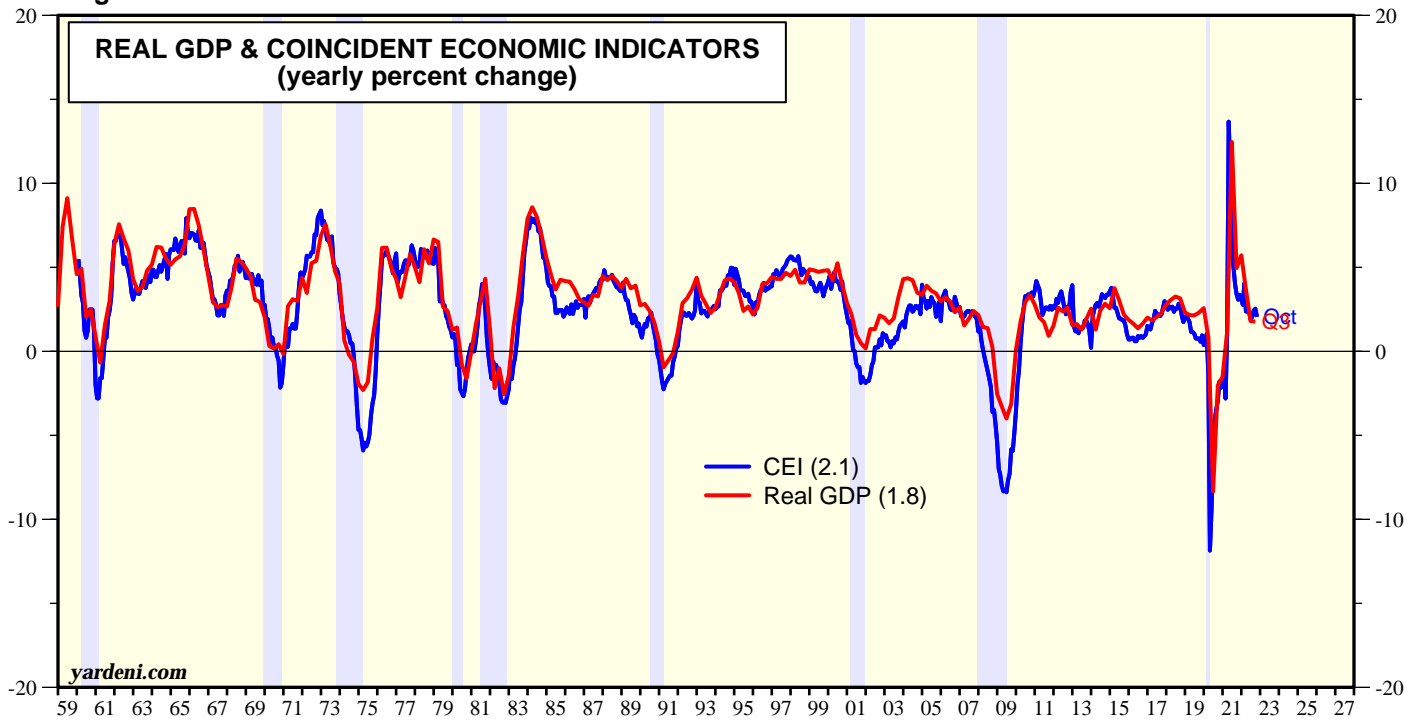
Source: Federal Reserve Board.

Figure 16.



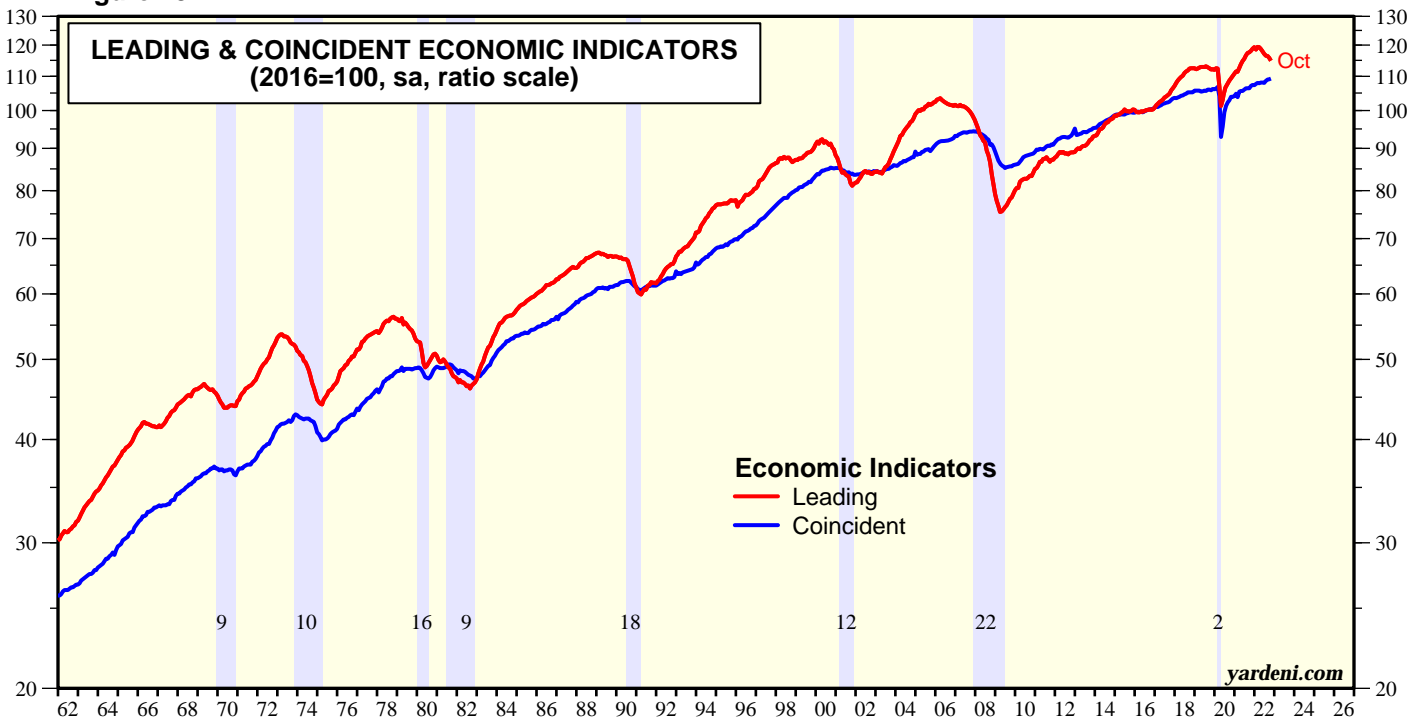
Source: Board of Governors of the Federal Reserve System.

Figure 17.



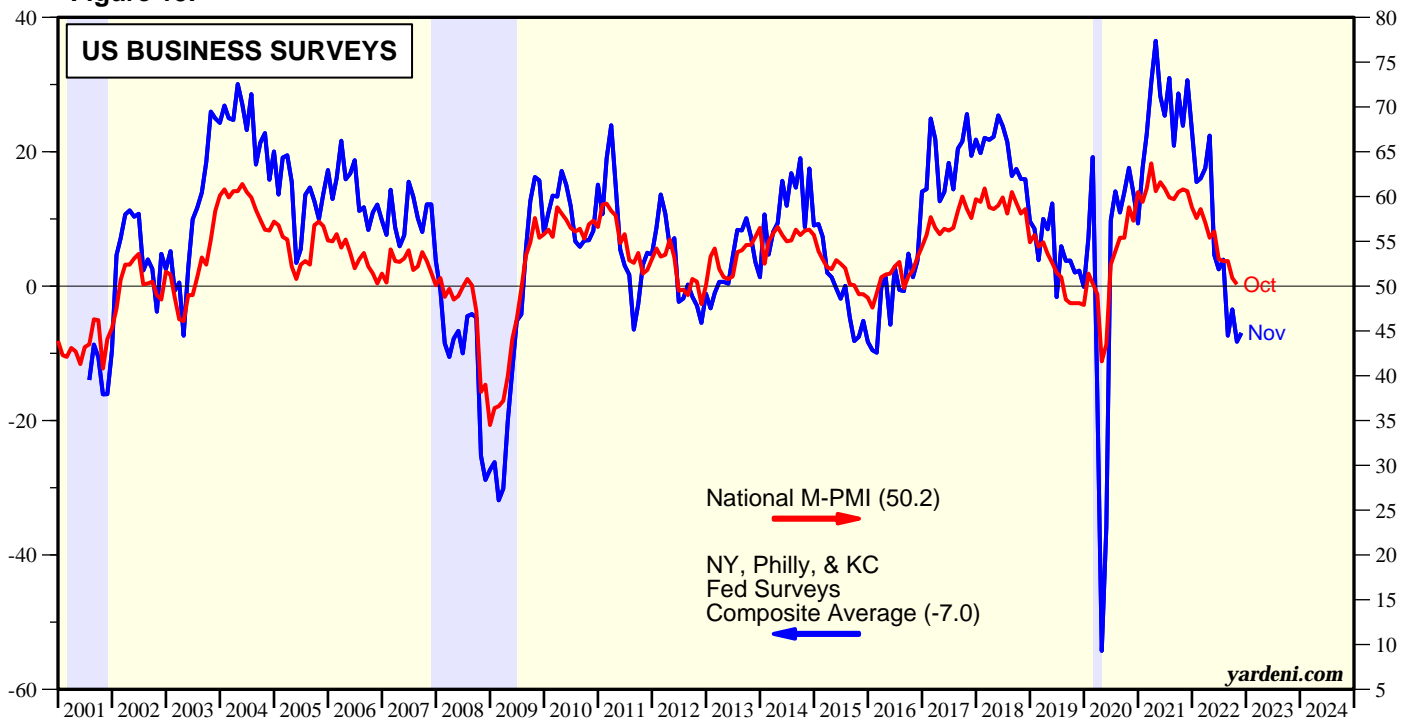
Note: Shaded areas denote recessions according to the National Bureau of Economic Research.
 Source: Bureau of Economic Analysis and Conference Board.

Figure 18.



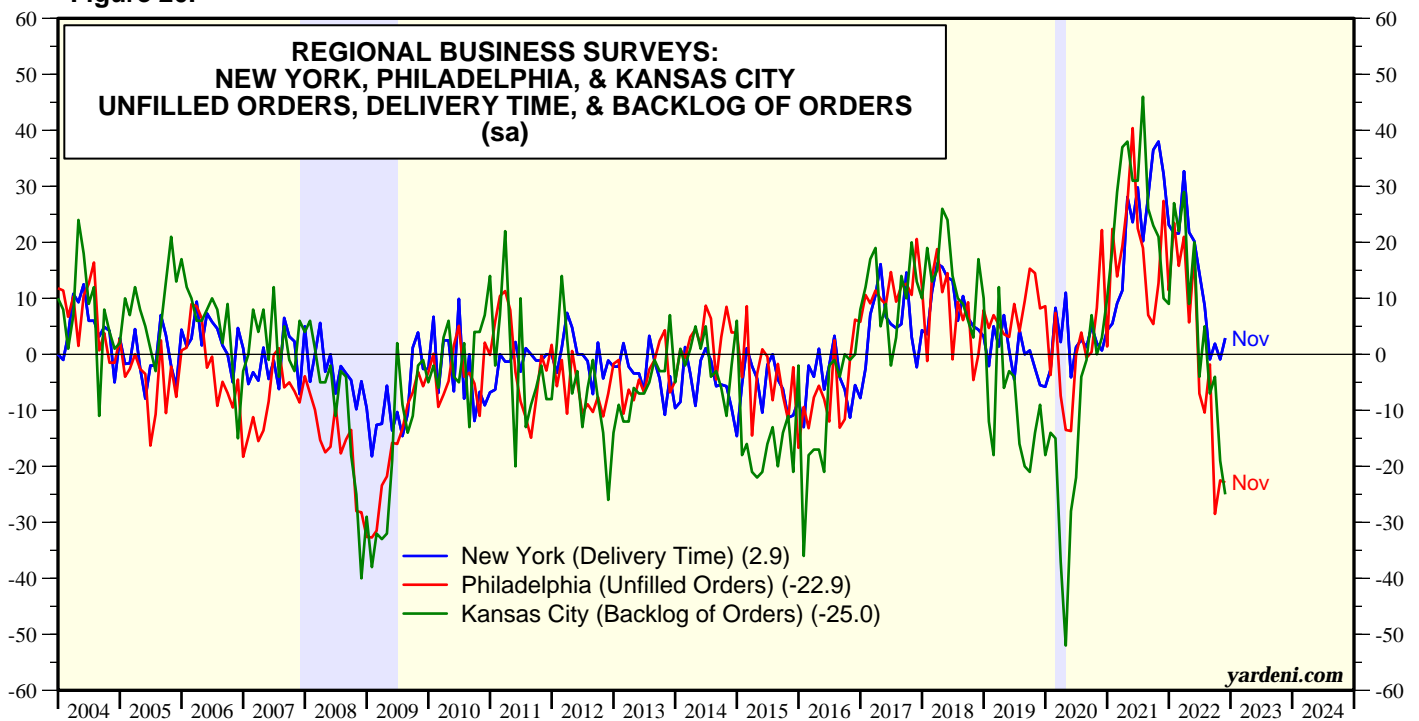
Note: Shaded areas are recessions according to the National Bureau of Economic Research. Numbers above time line reflect number of months from peak of leading indicators to peak of business cycle.
 Source: The Conference Board.

Figure 19.



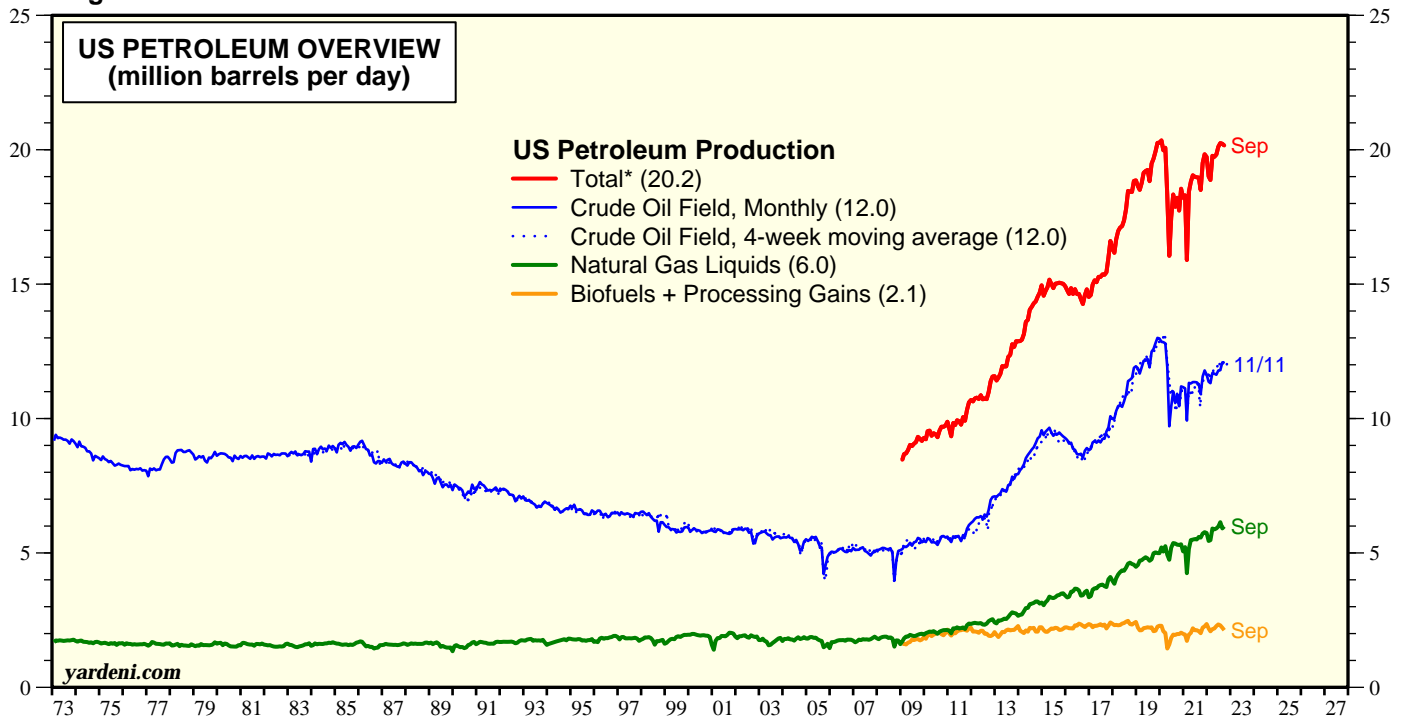
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Institute for Supply Management and Federal Reserve Banks of New York, Philadelphia, and Kansas City.

Figure 20.



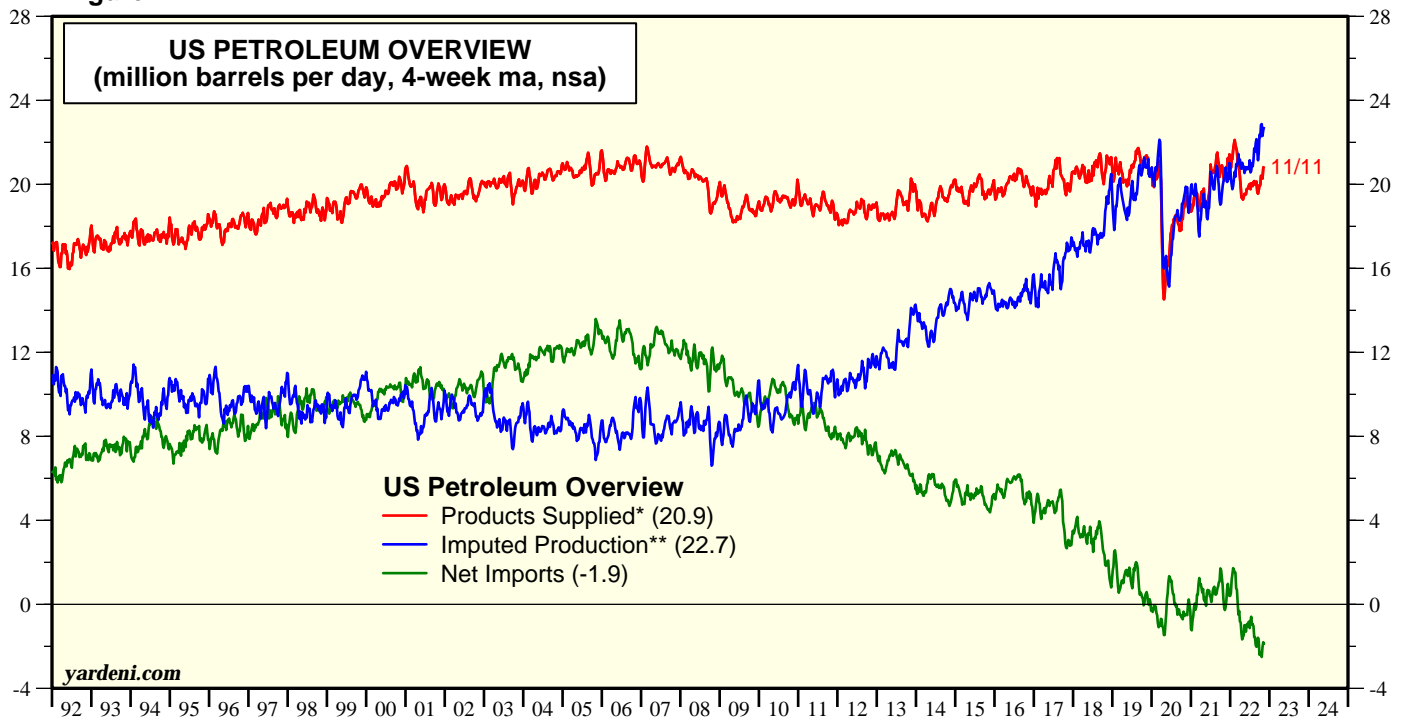
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Haver Analytics.

Figure 21.



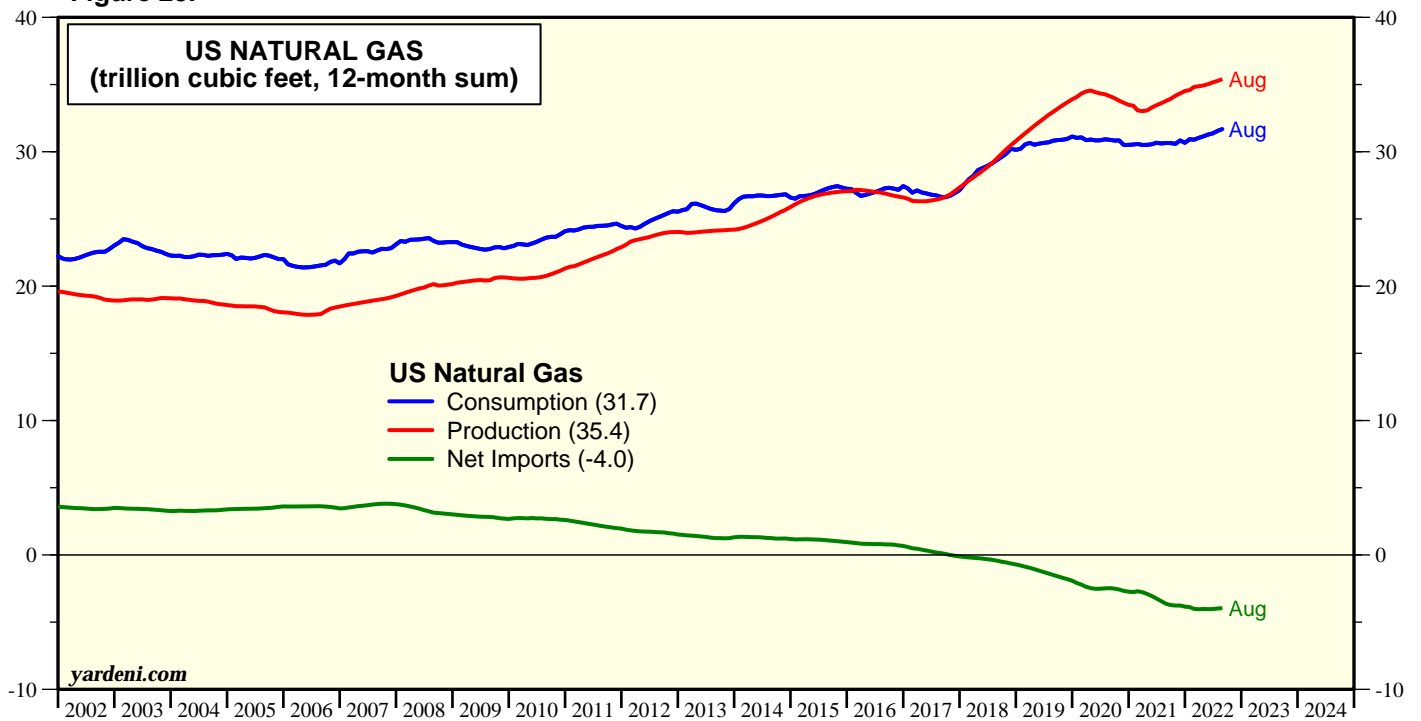
* Includes crude oil field production, natural gas liquids, biofuels, and processing gain.
Source: US Energy Information Administration, Monthly Review, Table 3.1.

Figure 22.



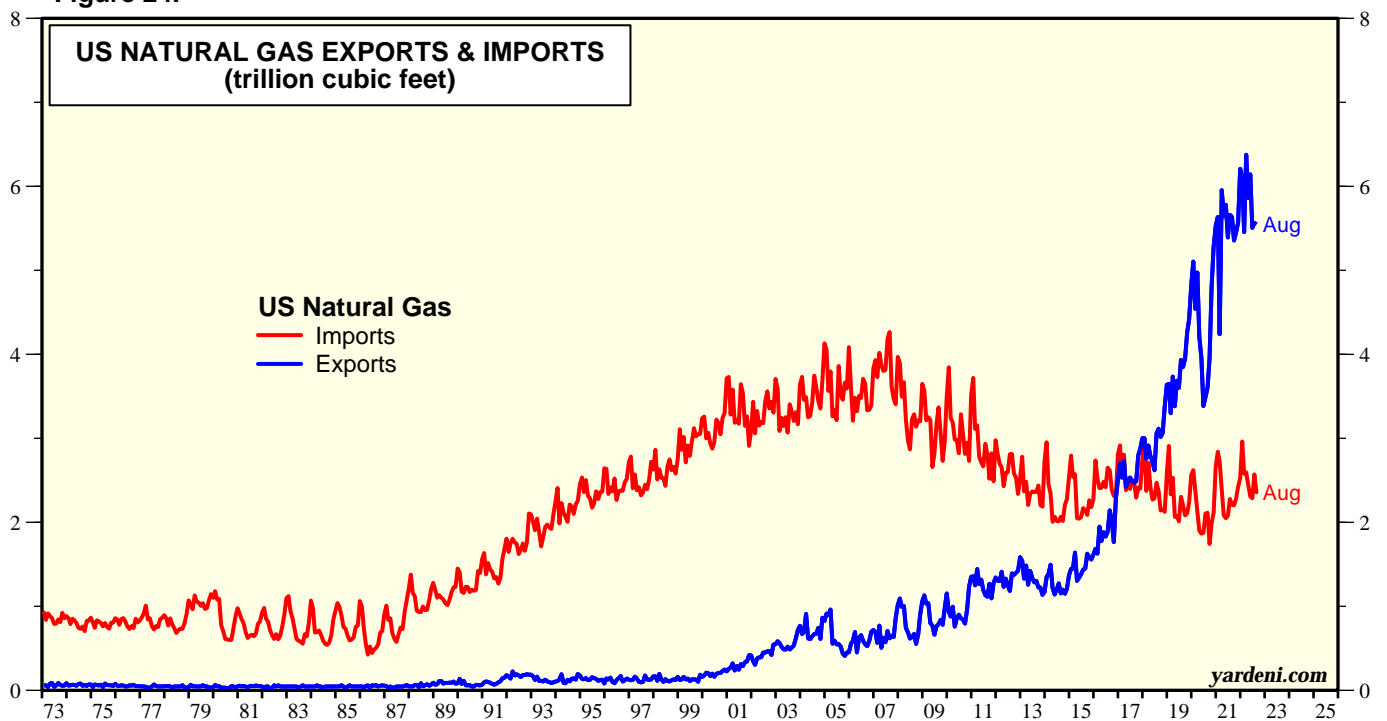
* A proxy for US domestic demand.
** Products supplied minus net imports.
Source: US Department of Energy and Haver Analytics

Figure 23.



Source: Energy Information Administration, Monthly Energy Review.

Figure 24.



Source: US Energy Information Administration, Monthly Energy Review Table 4.1.

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