

Chart Collection for Morning Briefing

Yardeni Research, Inc.

January 26, 2023

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Mali Quintana

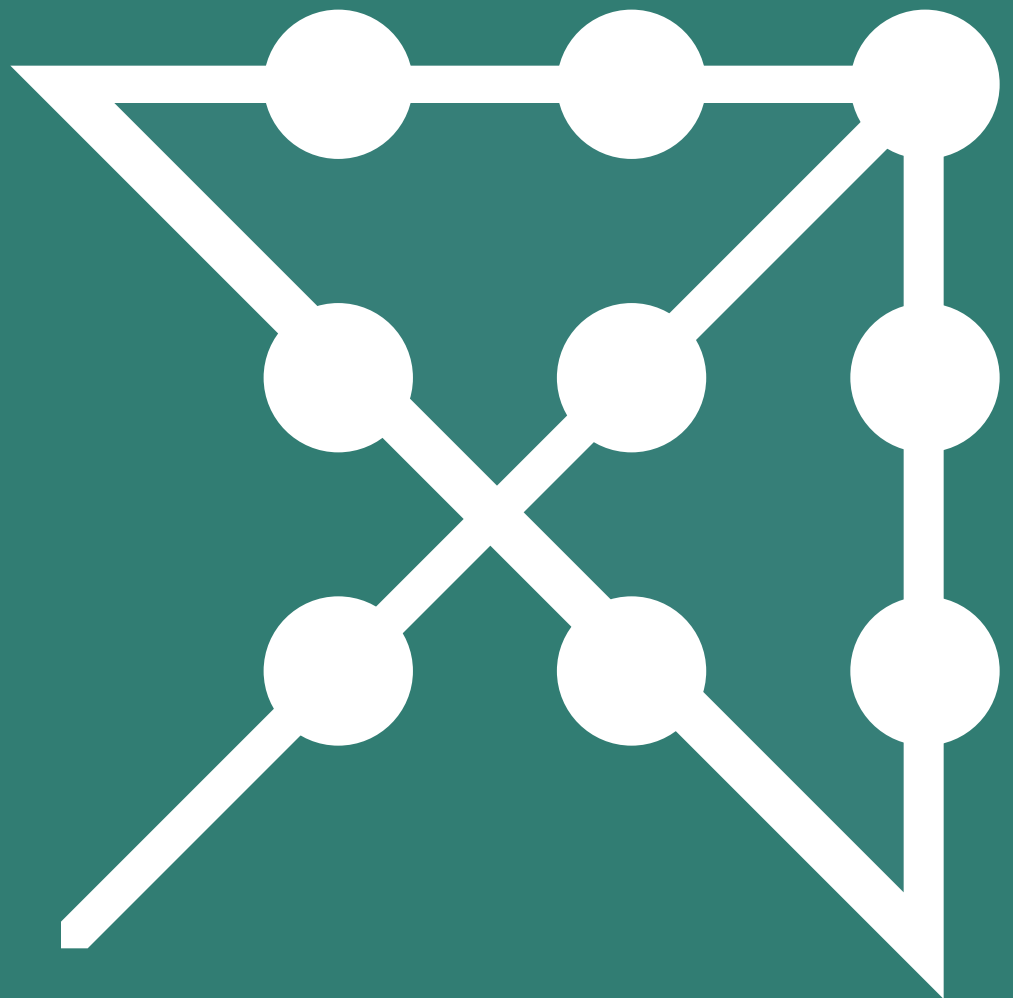
480-664-1333

aquintana@yardeni.com

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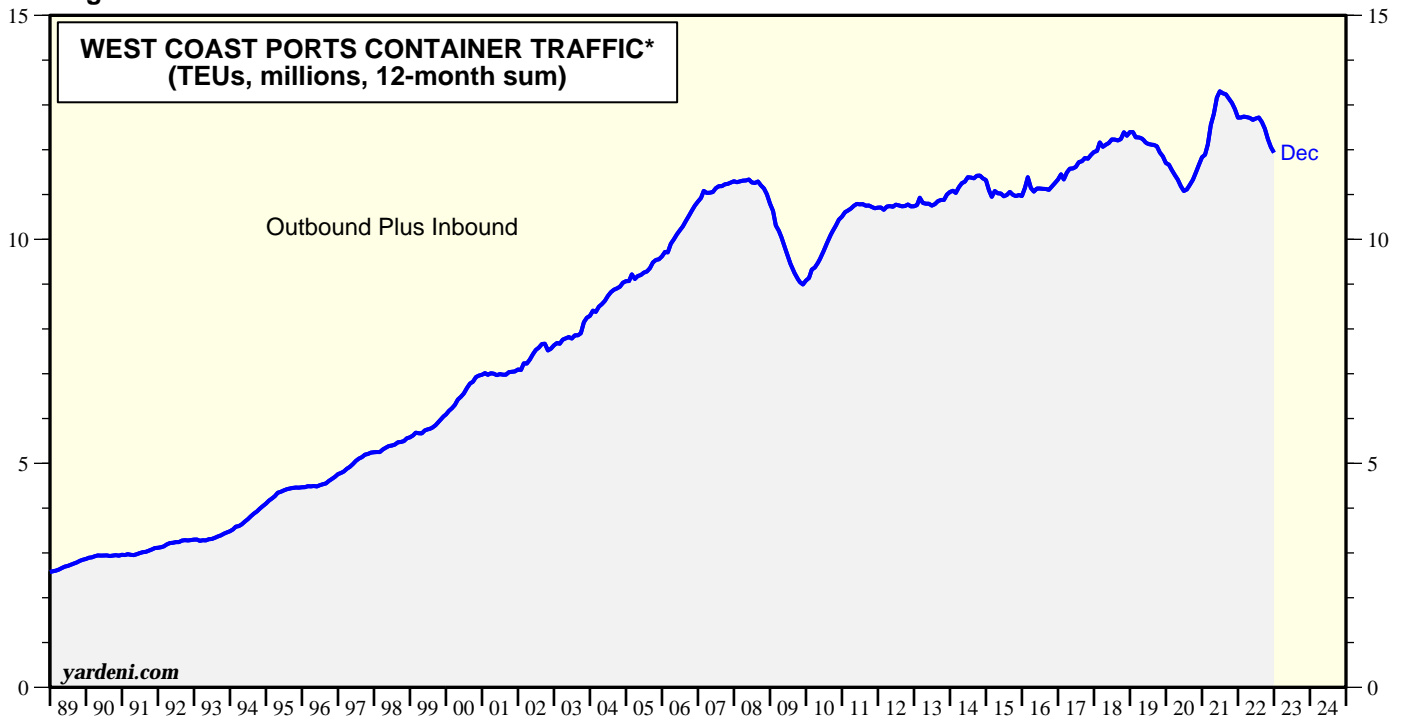
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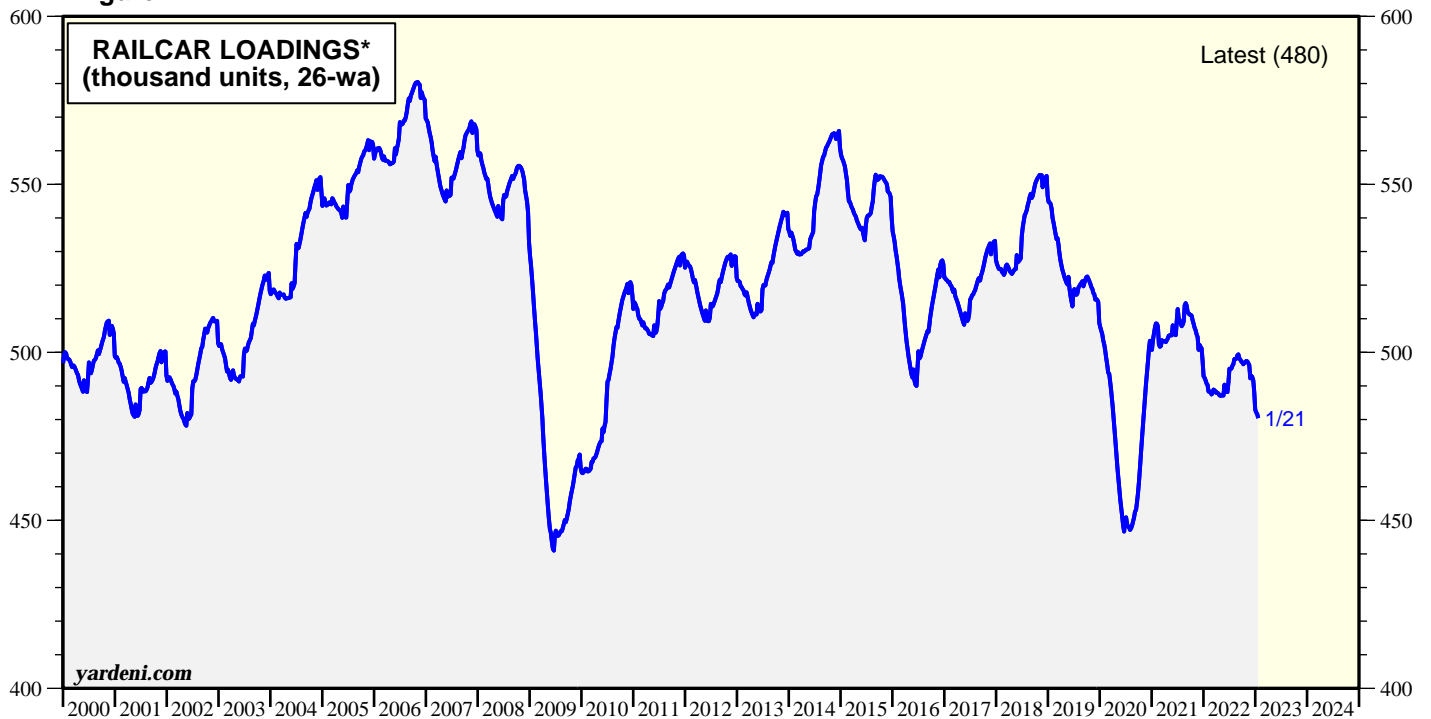
thinking outside the box

Figure 1.



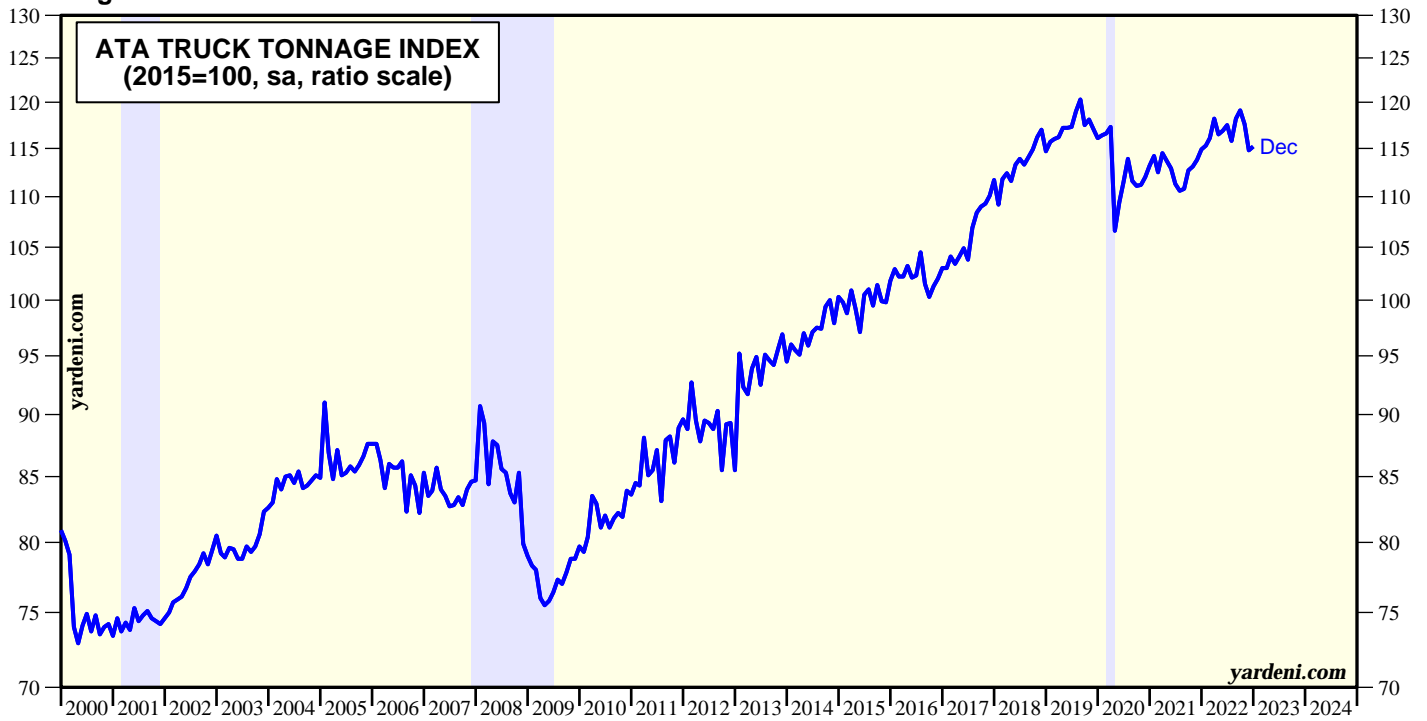
* Sum of Port of Los Angeles and Port of Long Beach Loaded Containers. TEUs=20-foot equivalent units.
Source: Ports of Los Angeles and Long Beach.

Figure 2.



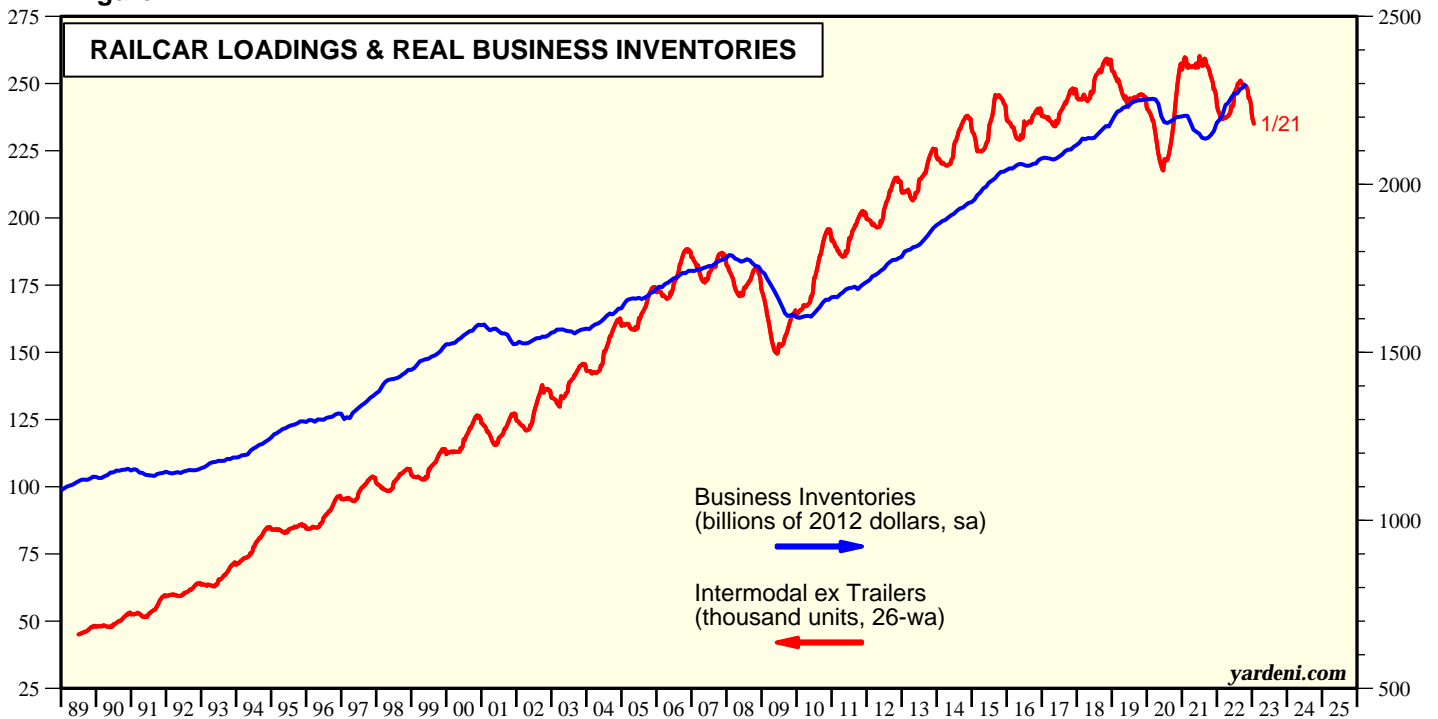
* Carloads plus intermodal.
Source: Atlantic Systems.

Figure 3.



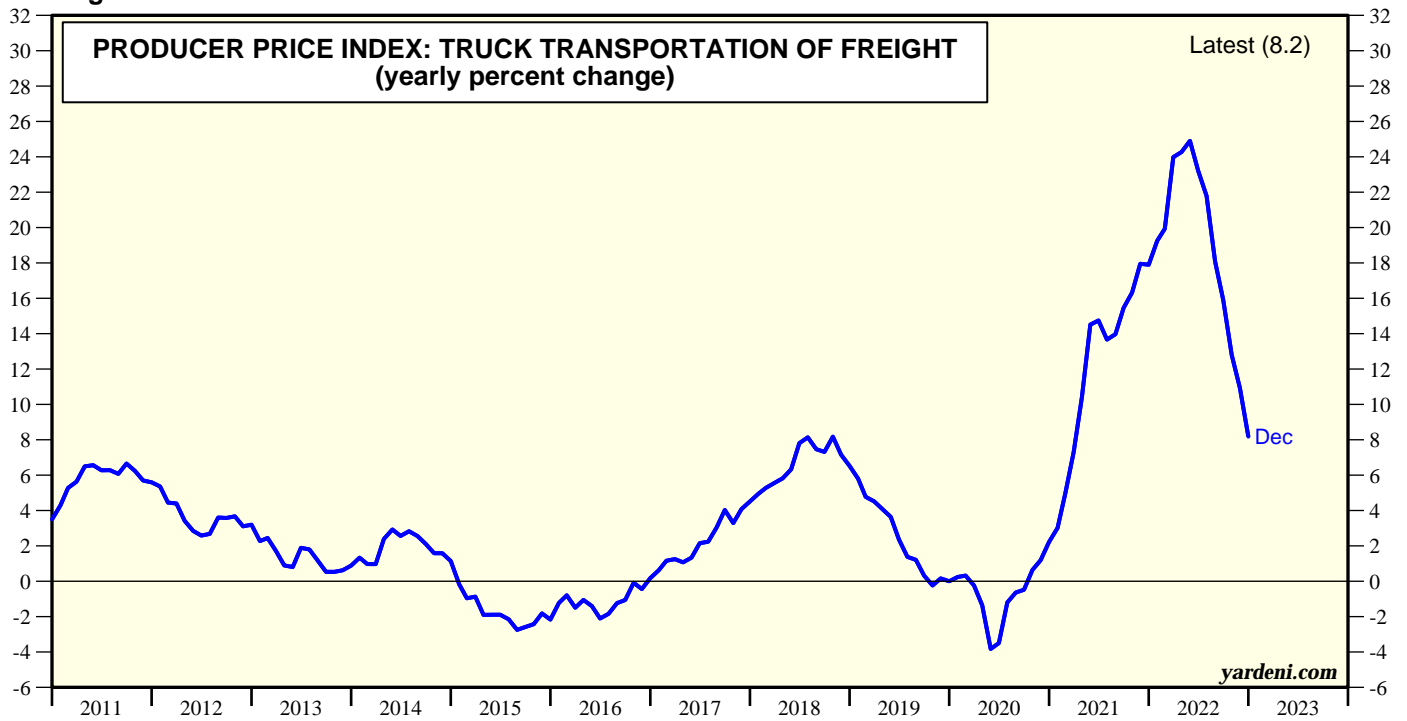
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: American Trucking Association.

Figure 4.



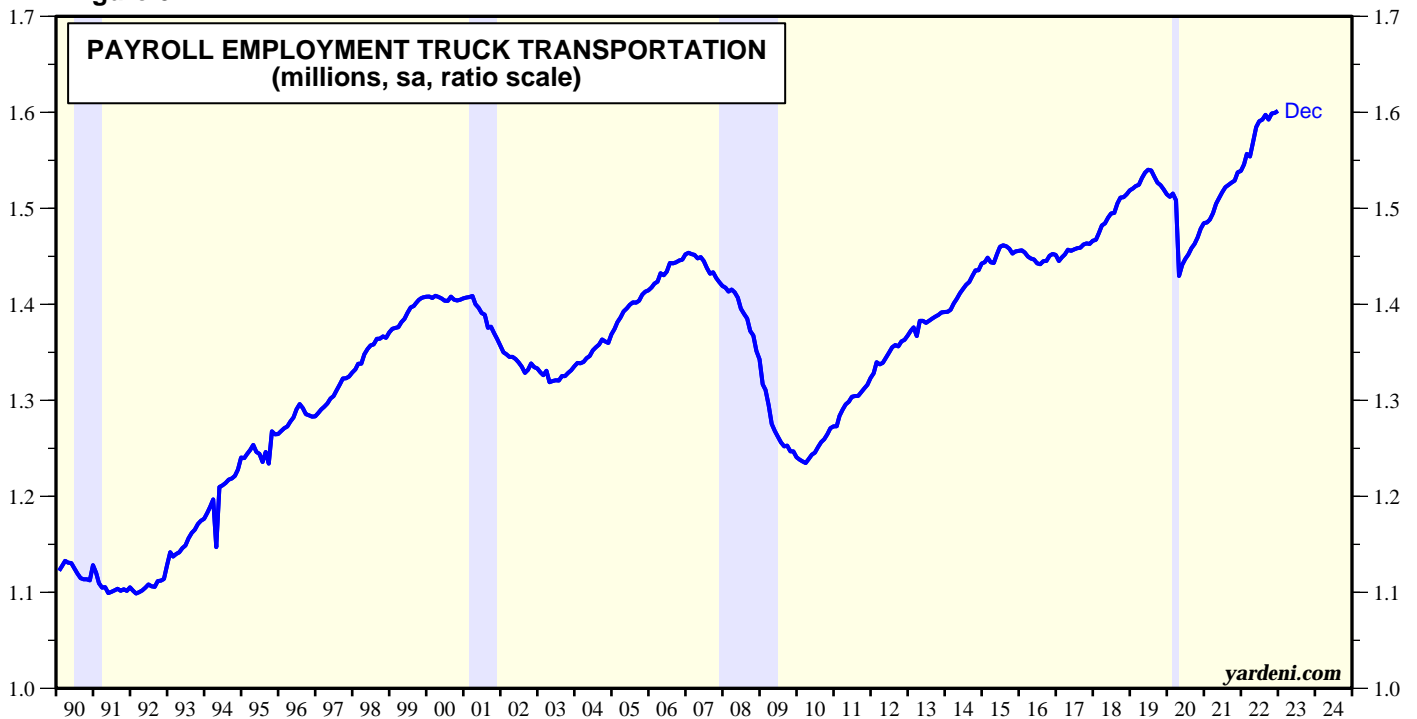
Source: Atlantic Systems and Census Bureau.

Figure 5.



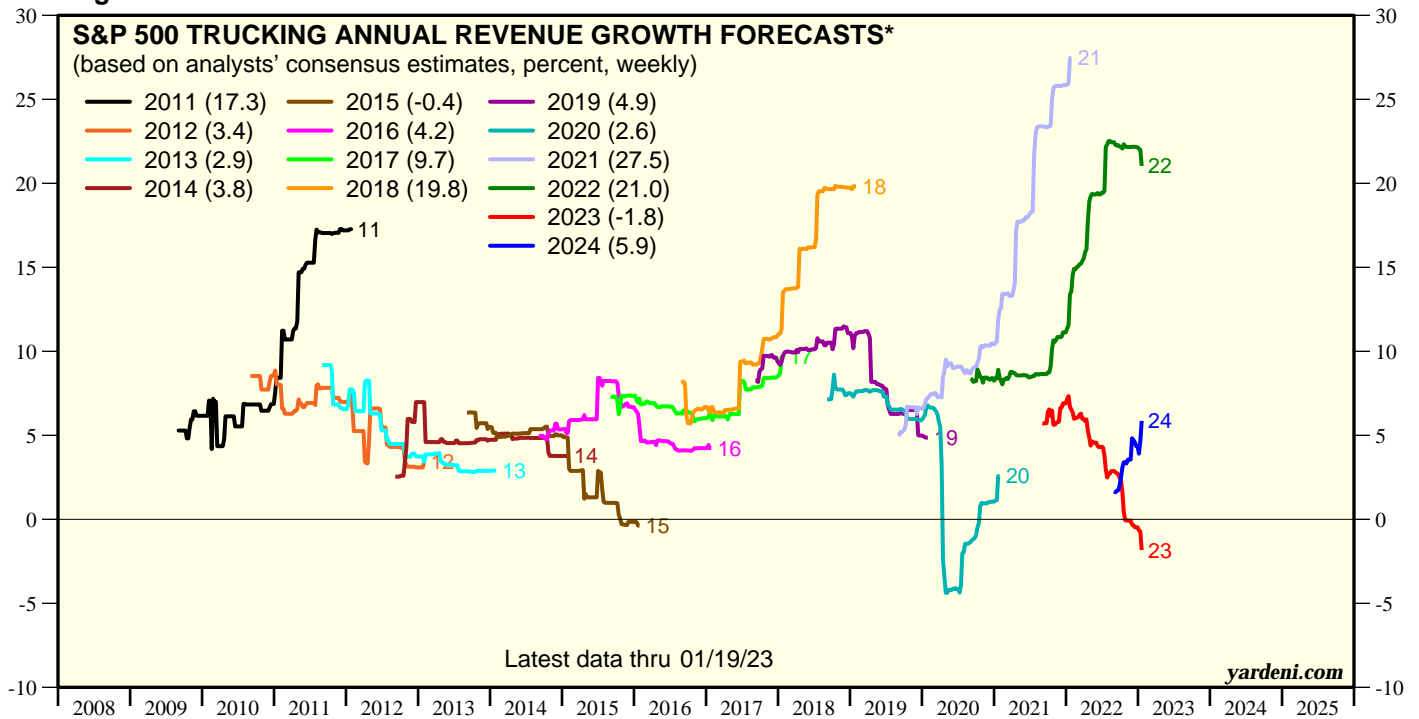
Source: Bureau of Labor Statistics.

Figure 6.



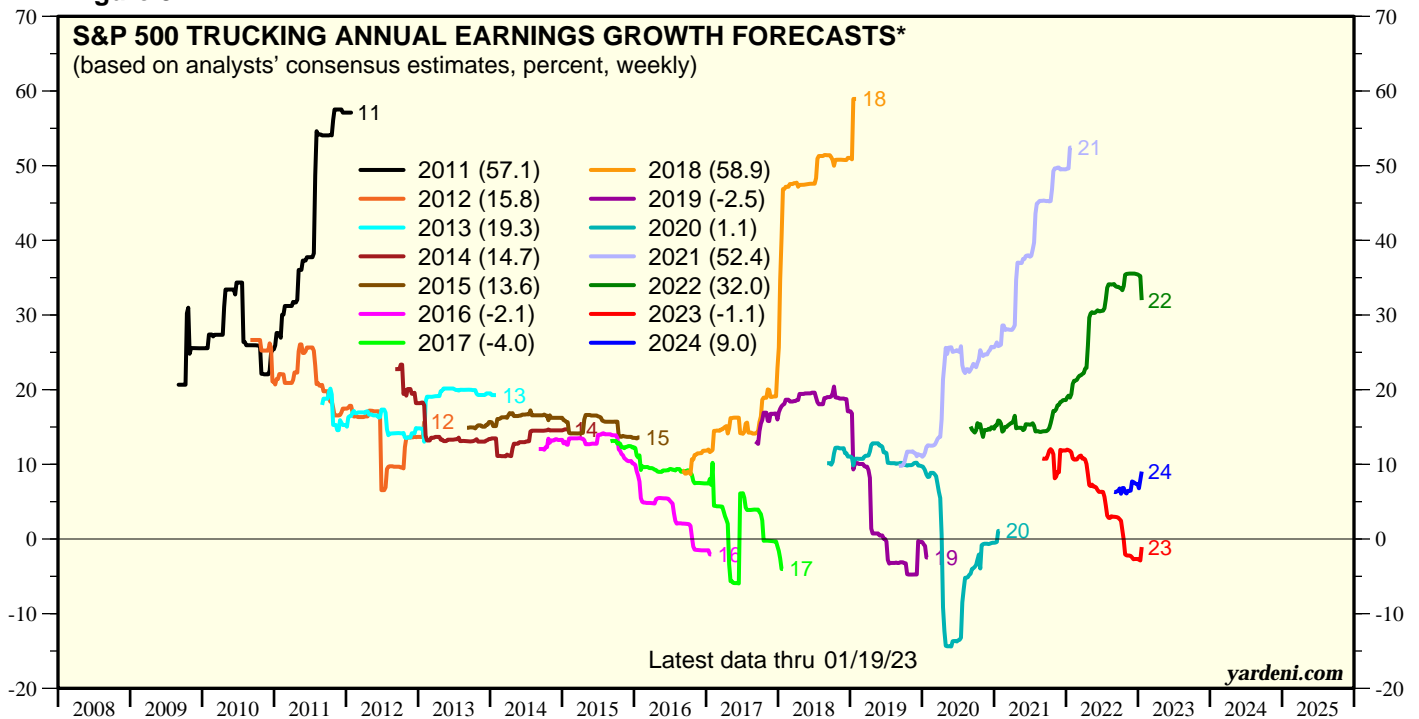
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Bureau of Labor Statistics.

Figure 7.



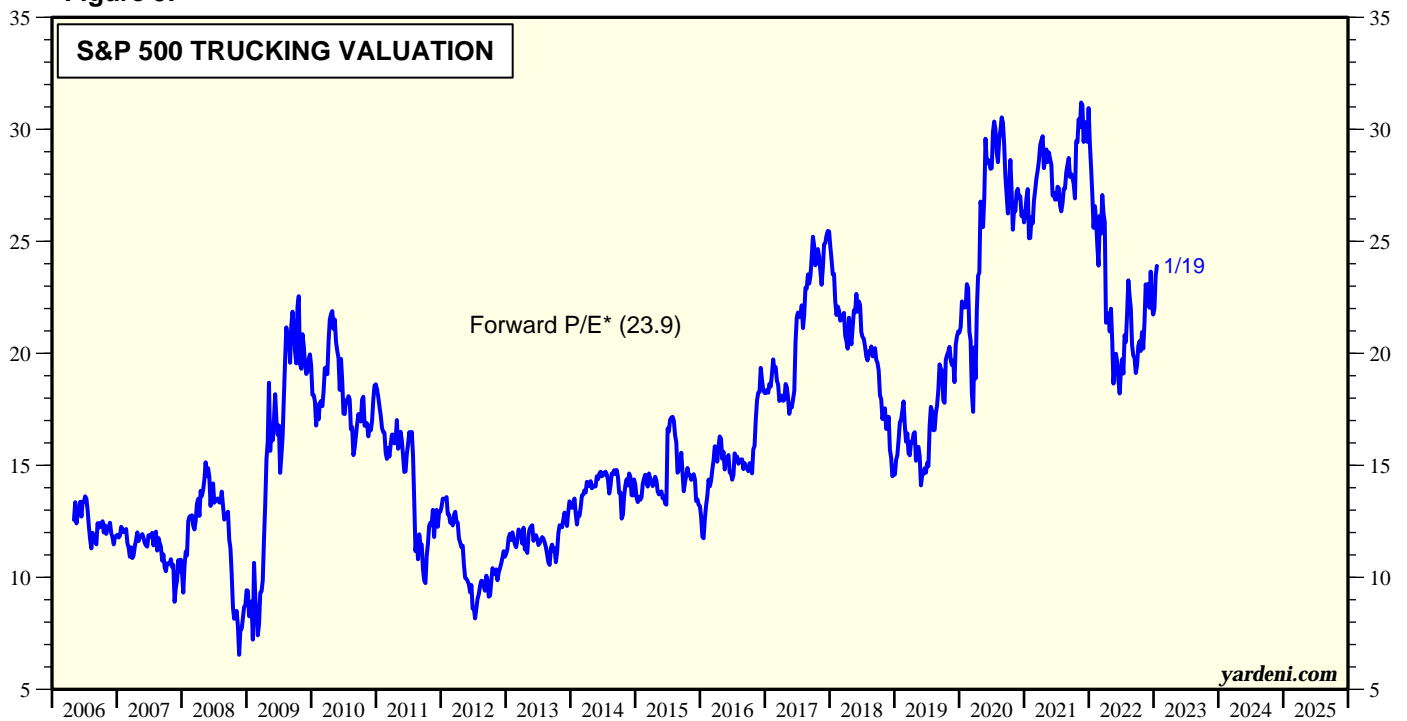
Source: I/B/E/S data by Refinitiv.

Figure 8.



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

Figure 9.



* Price divided by 12-month forward consensus expected operating earnings per share.
Source: I/B/E/S data by Refinitiv.

Figure 10.



— 200-day moving average
* Nearby futures price.
Source: Haver Analytics.

Figure 11.

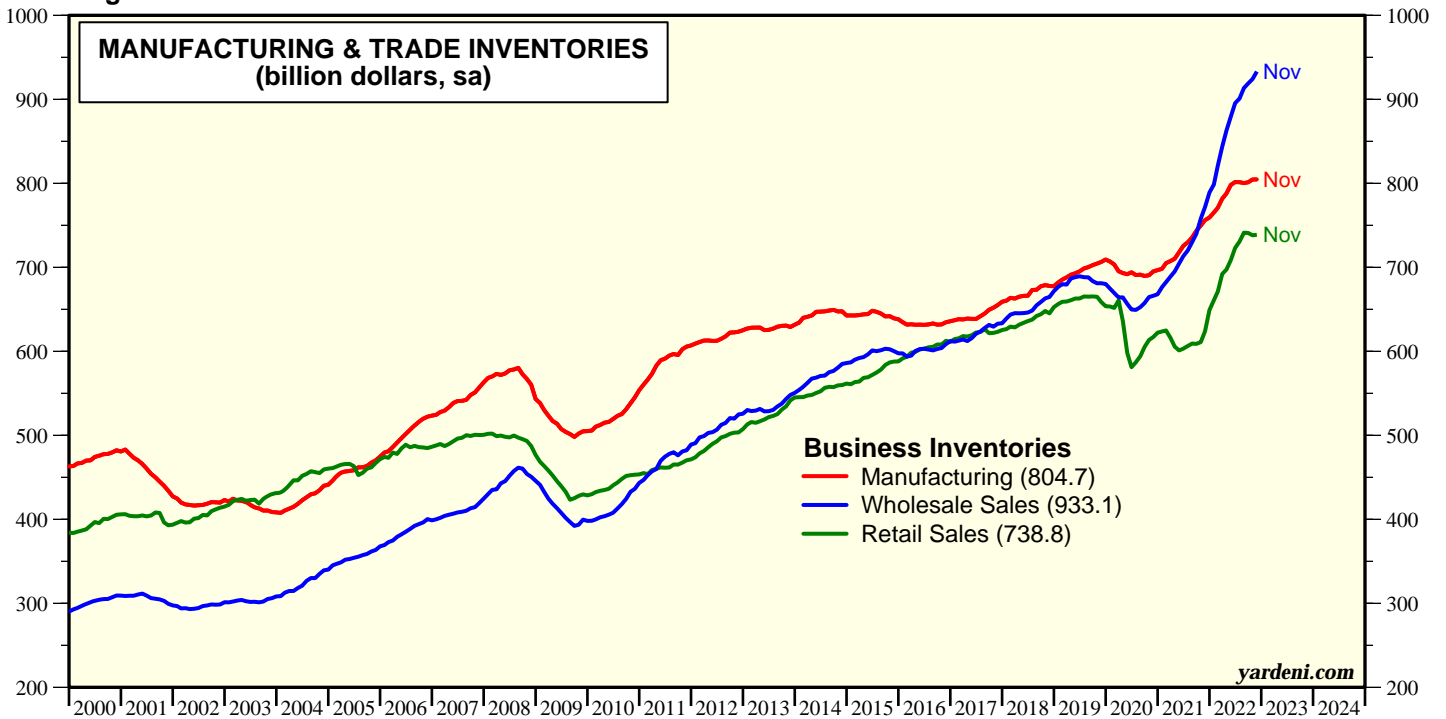


Figure 12.

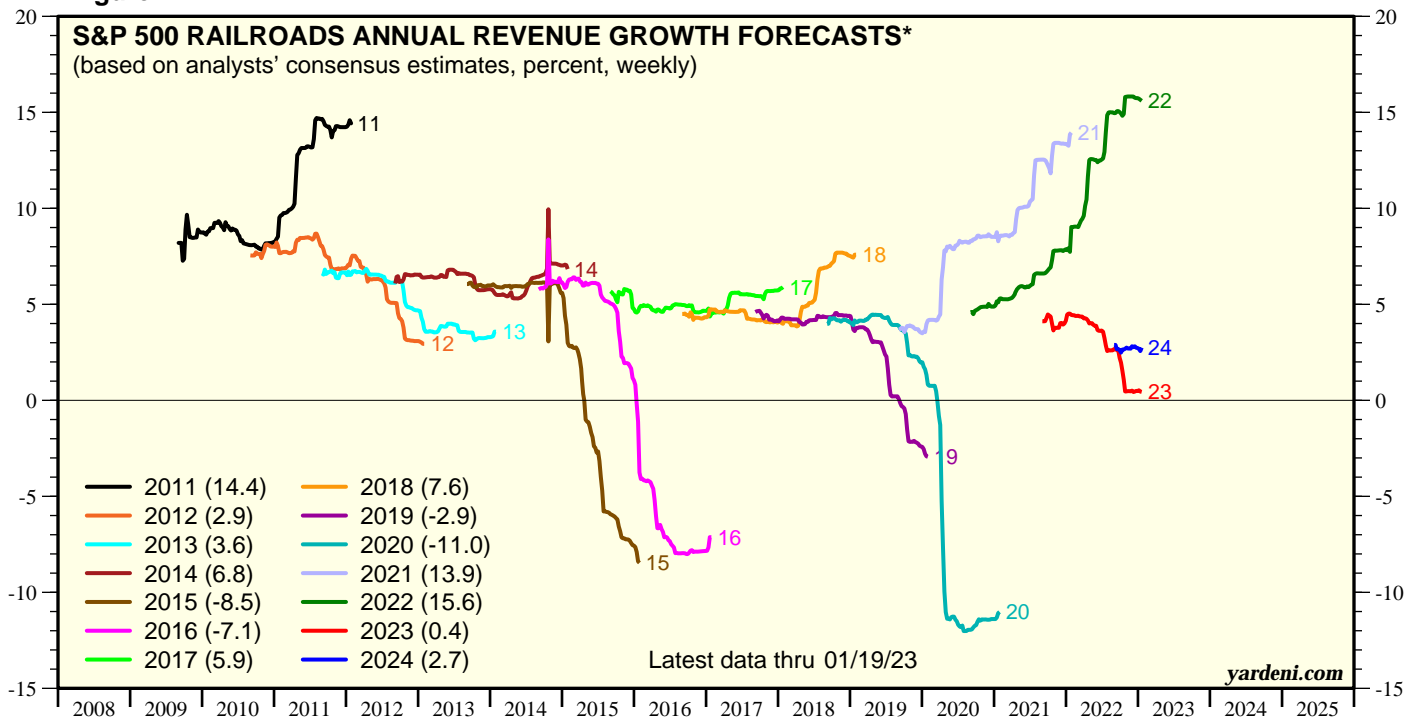
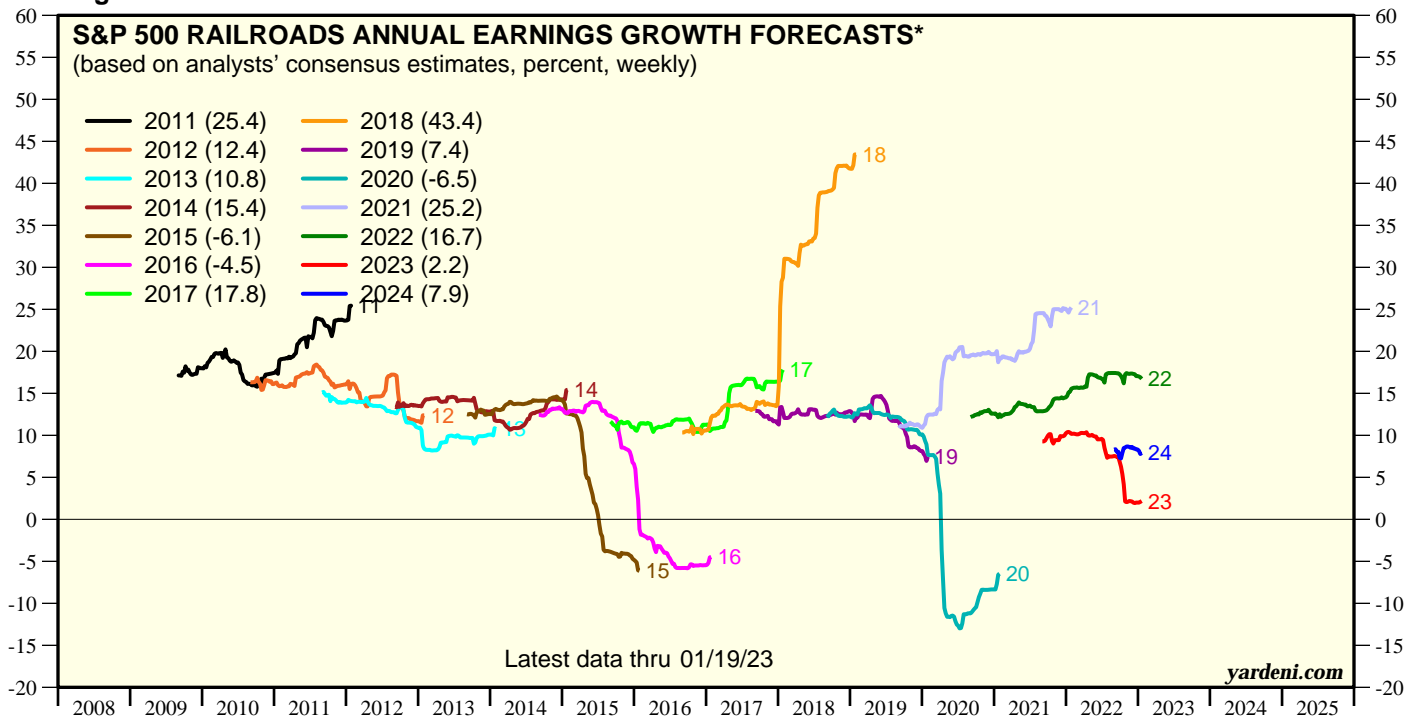
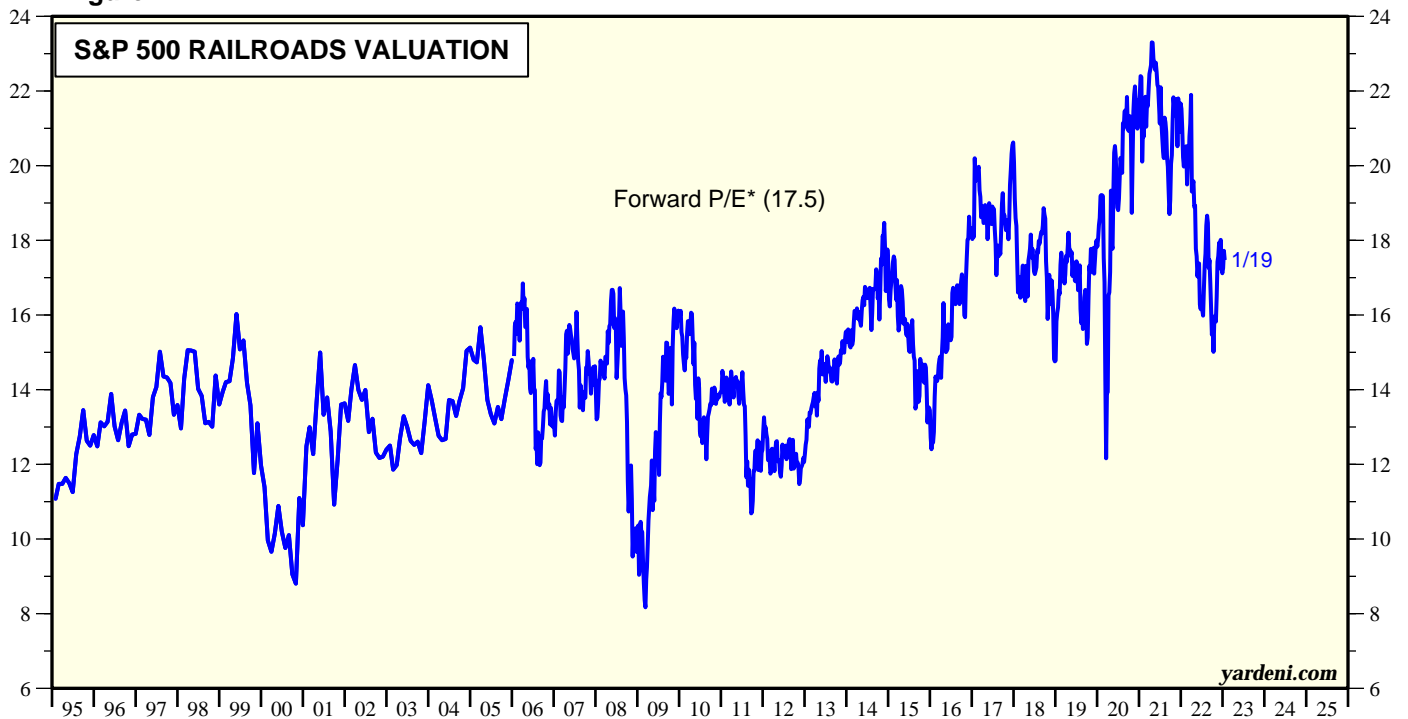


Figure 13.



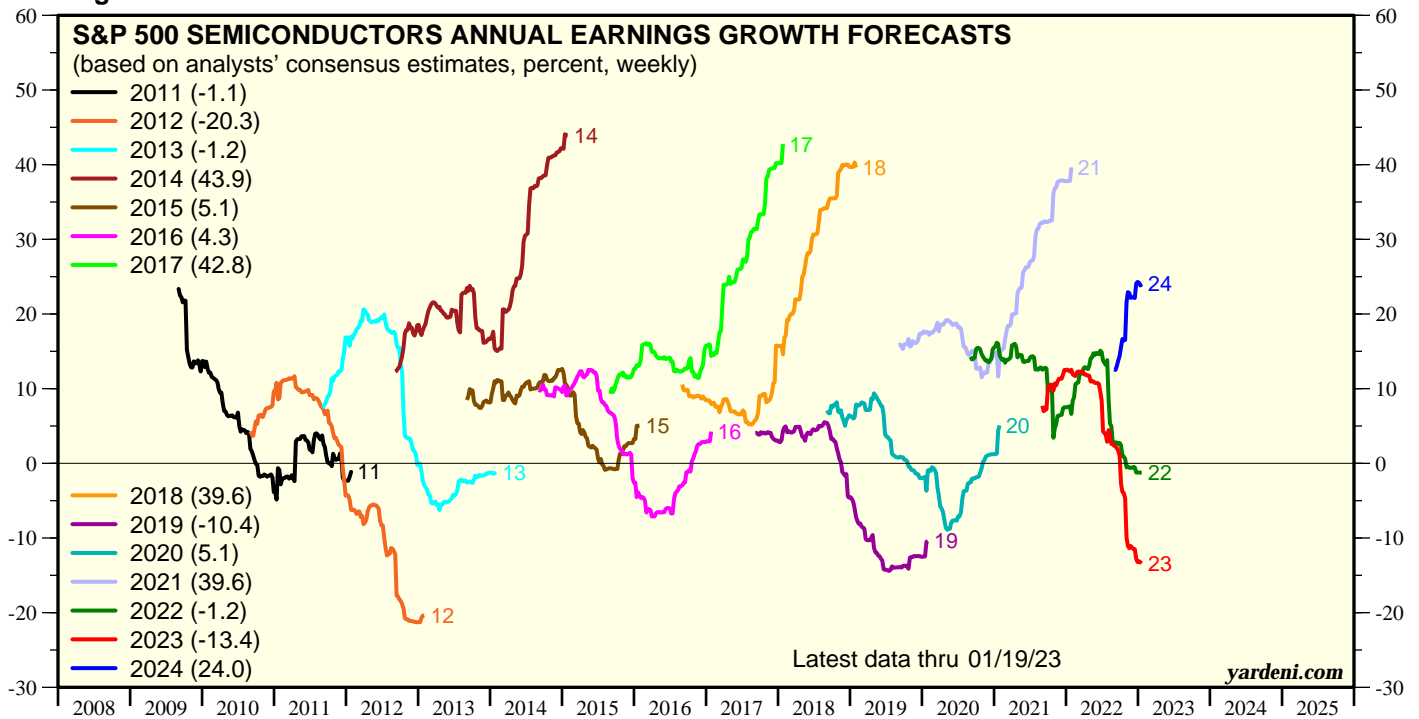
Source: I/B/E/S data by Refinitiv.

Figure 14.



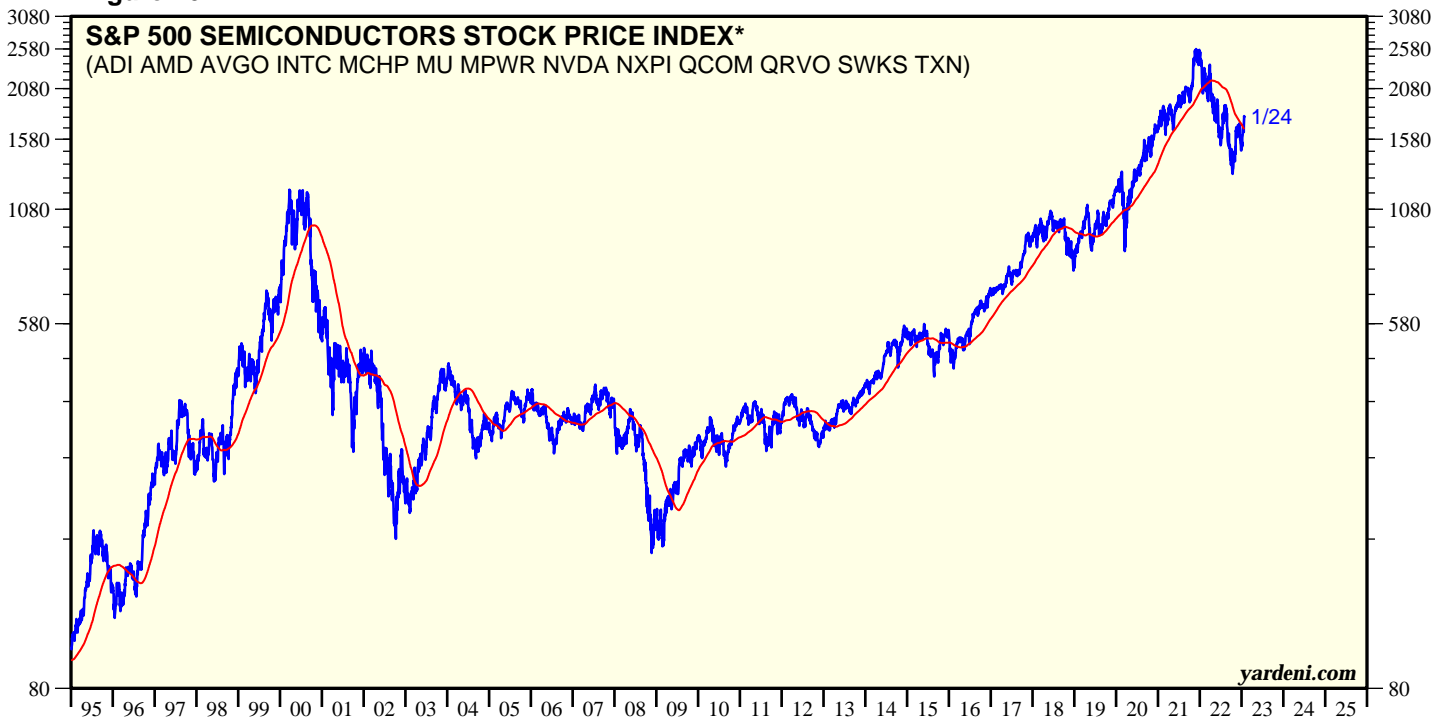
* Price divided by 12-month forward consensus expected operating earnings per share.
Source: I/B/E/S data by Refinitiv.

Figure 15.



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

Figure 16.



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