

Chart Collection for Morning Briefing

Yardeni Research, Inc.

July 10, 2023

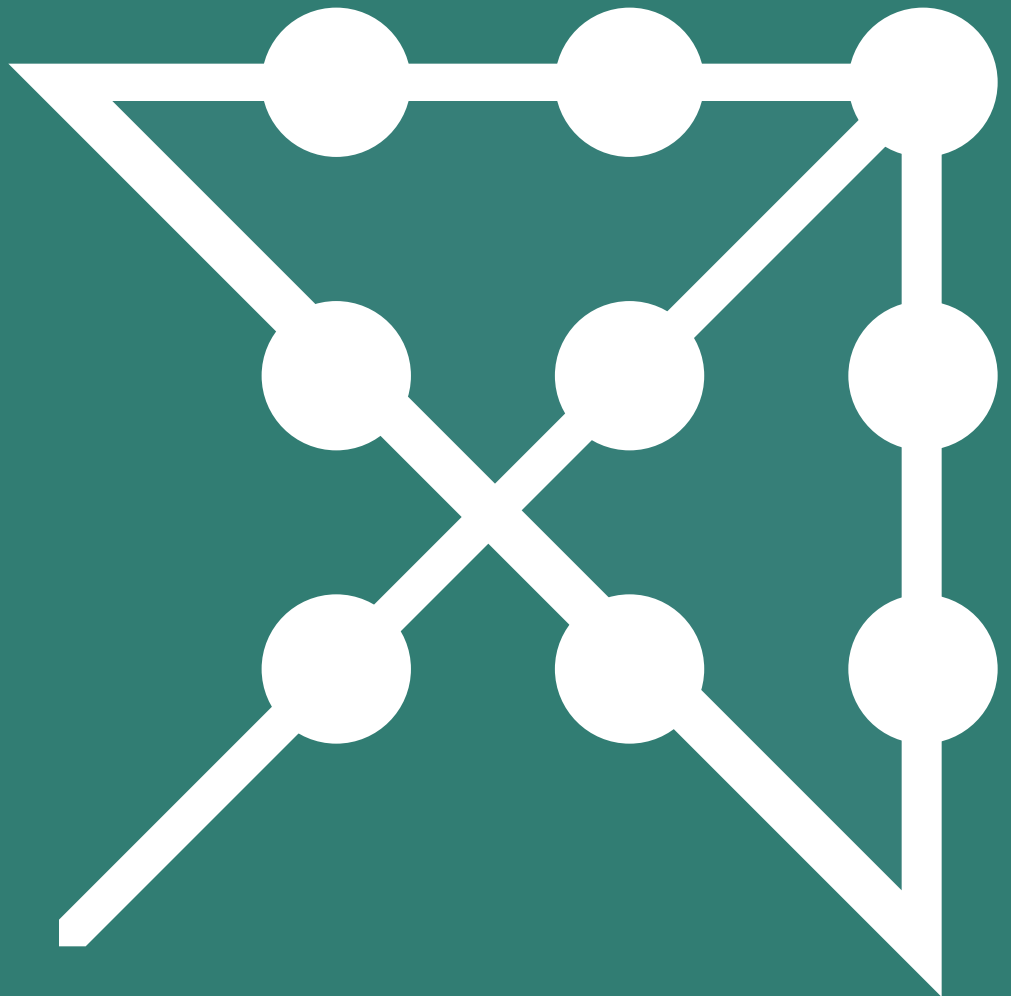
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Mali Quintana

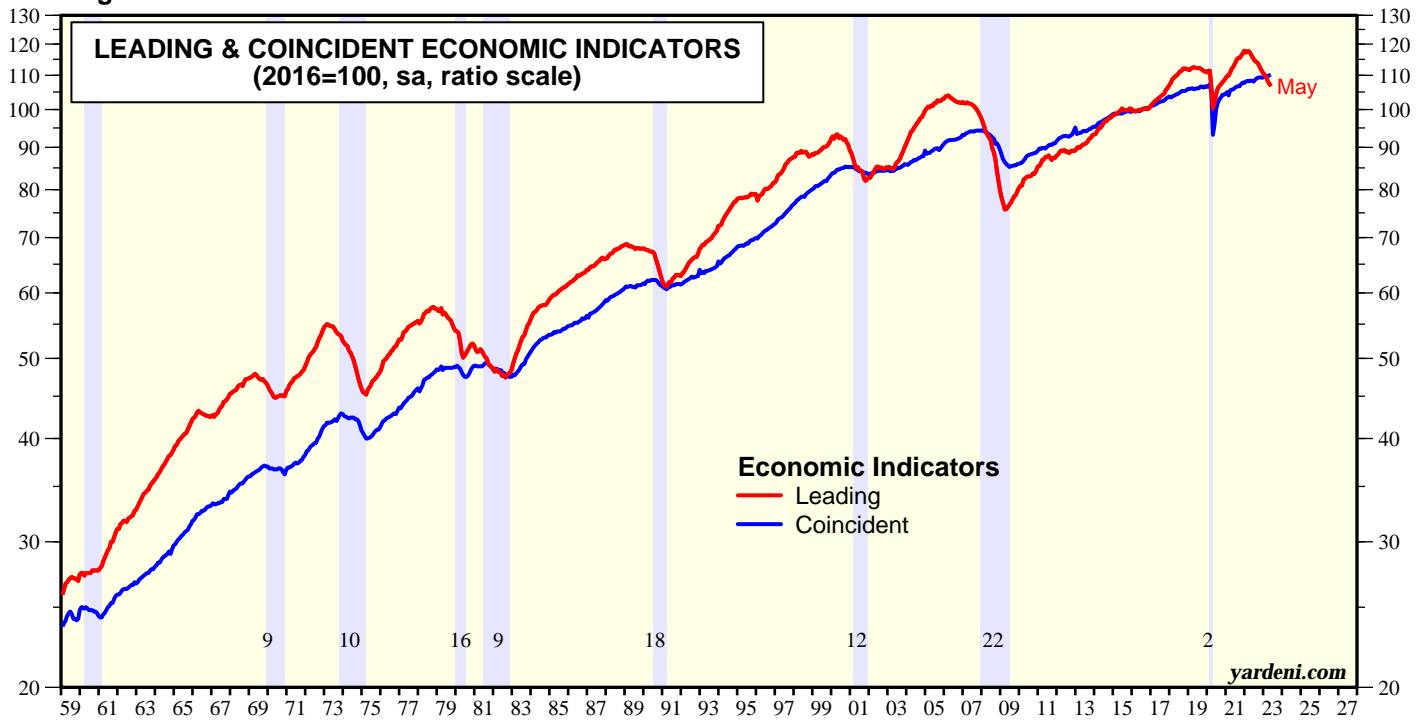
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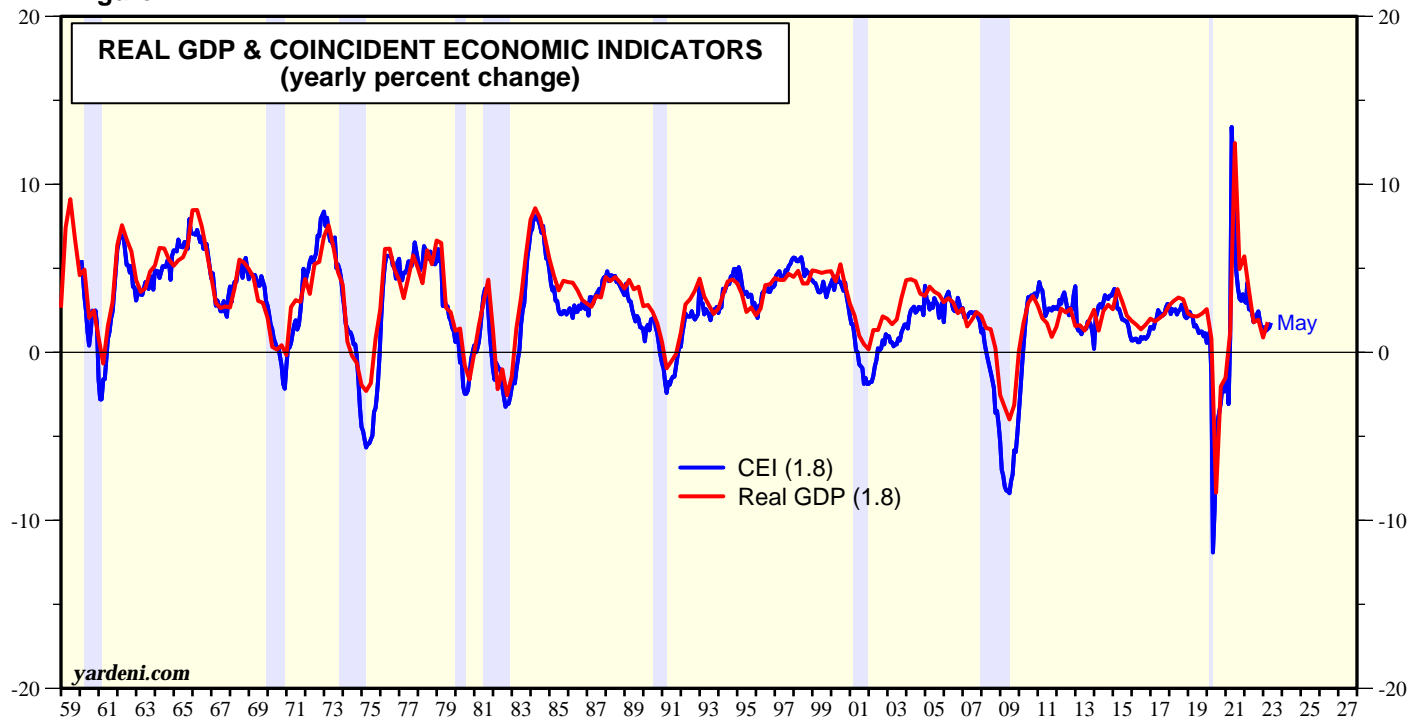
thinking outside the box

Figure 1.



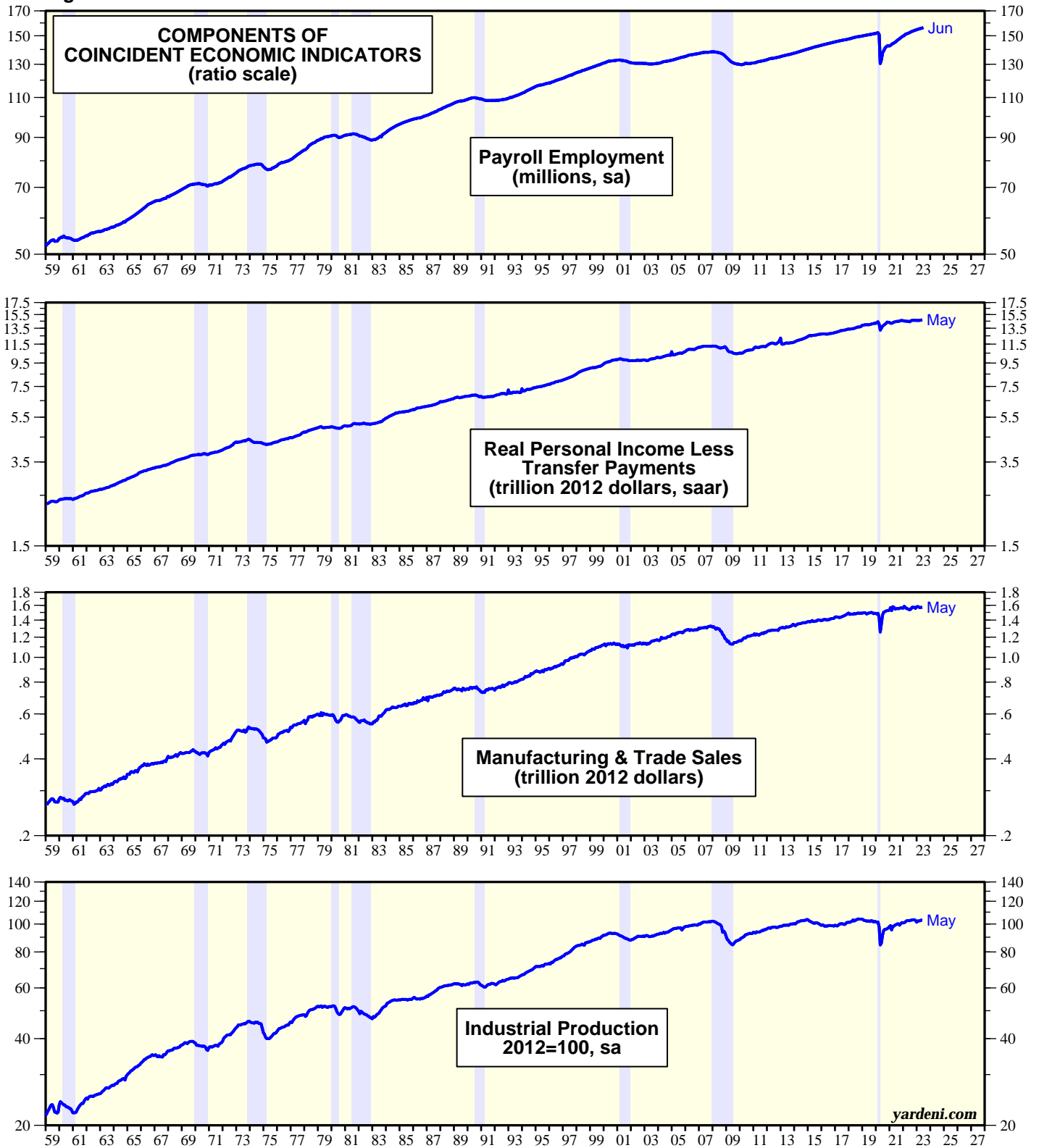
Note: Shaded areas are recessions according to the National Bureau of Economic Research. Numbers above timeline reflect number of months from peak of leading indicators to peak of business cycle.
 Source: The Conference Board.

Figure 2.



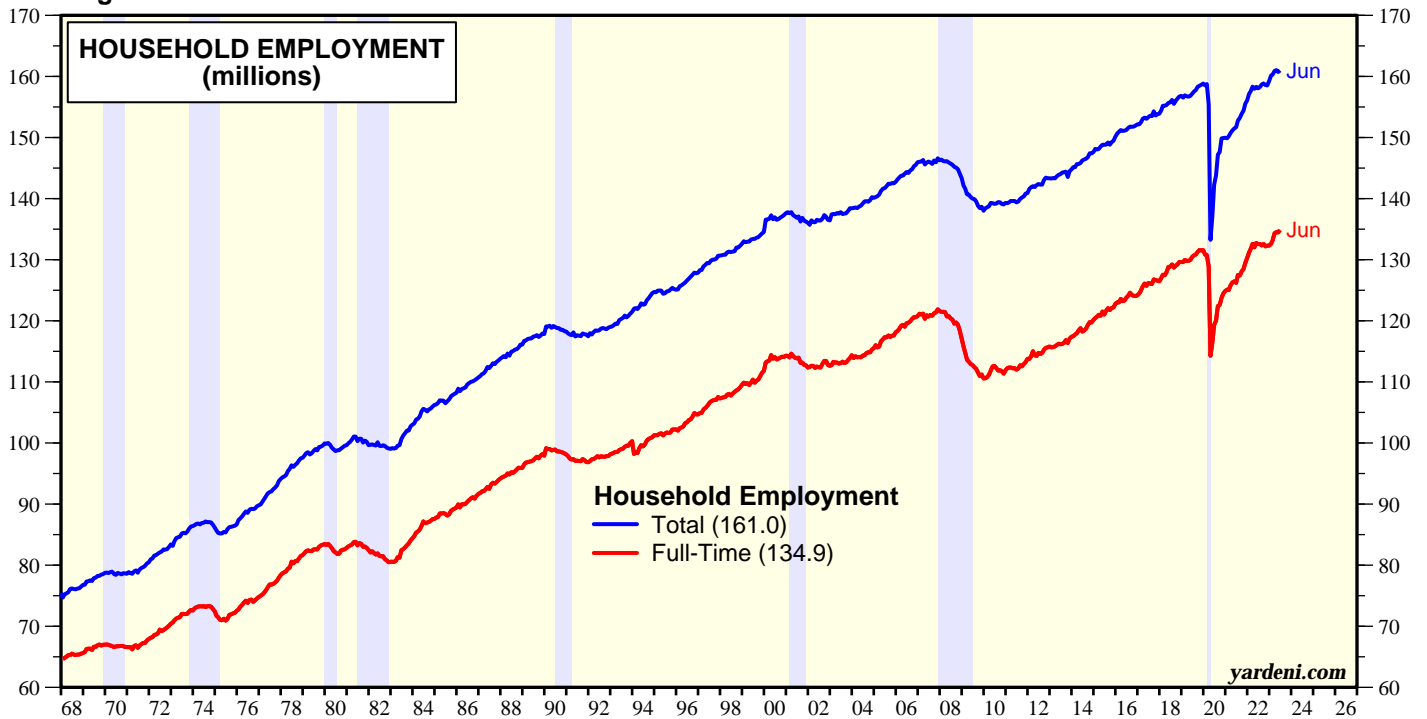
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Bureau of Economic Analysis and Conference Board.

Figure 3.



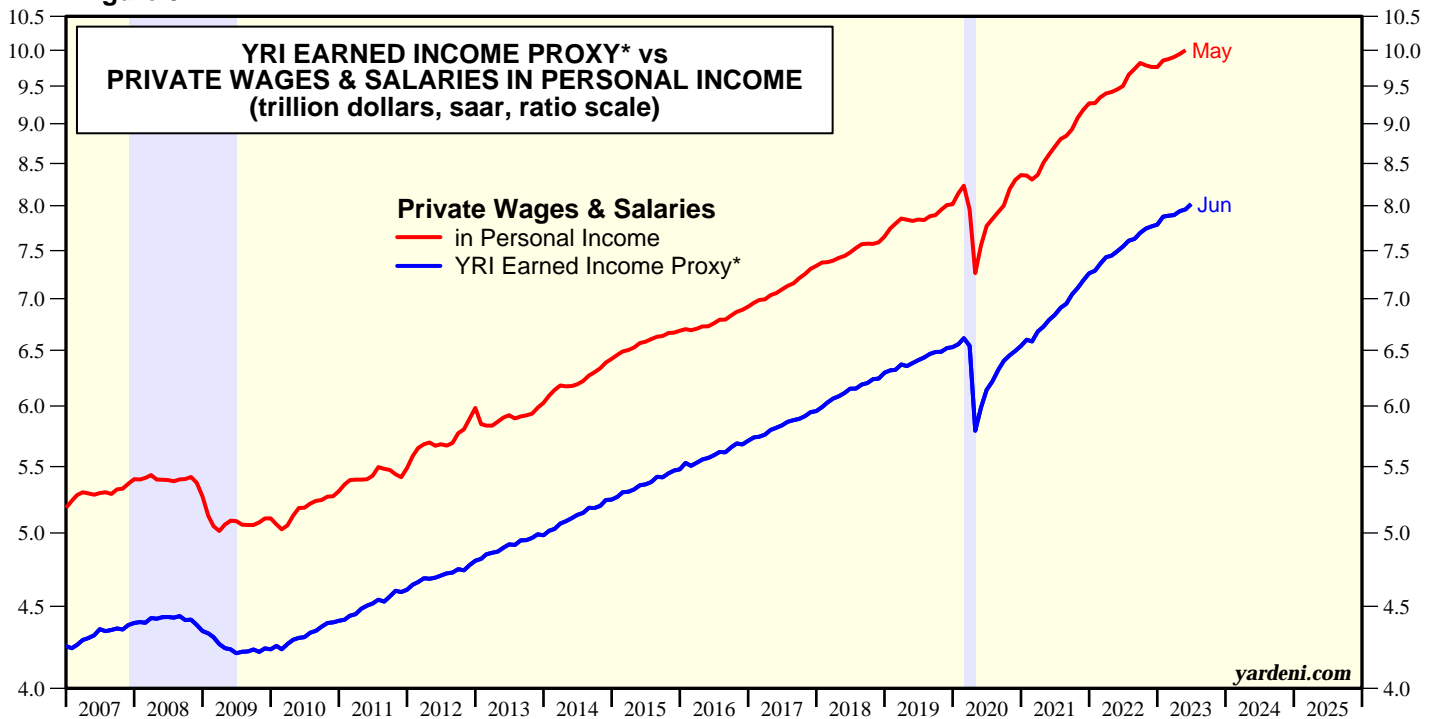
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Bureau of Labor Statistics, Bureau of Economic Analysis, Census Bureau, and Federal Reserve Board.

Figure 4.



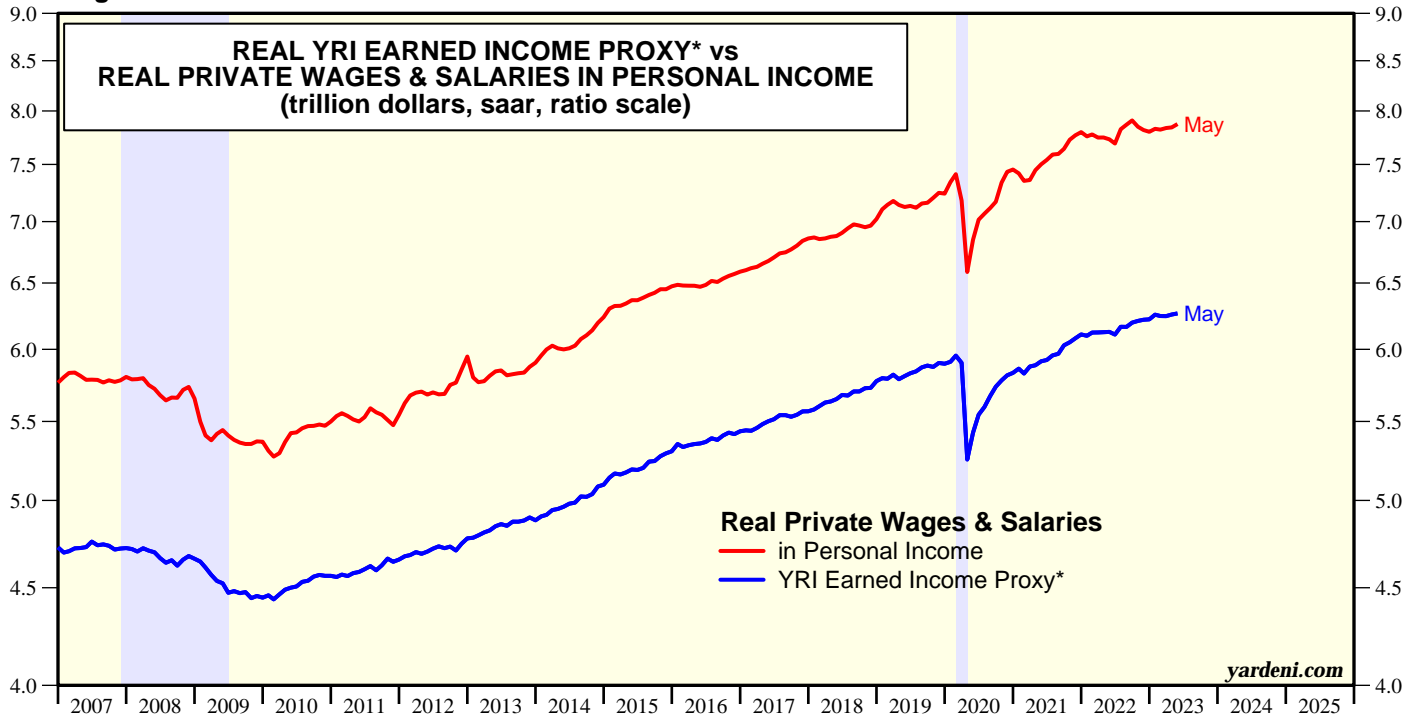
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Bureau of the Census.

Figure 5.



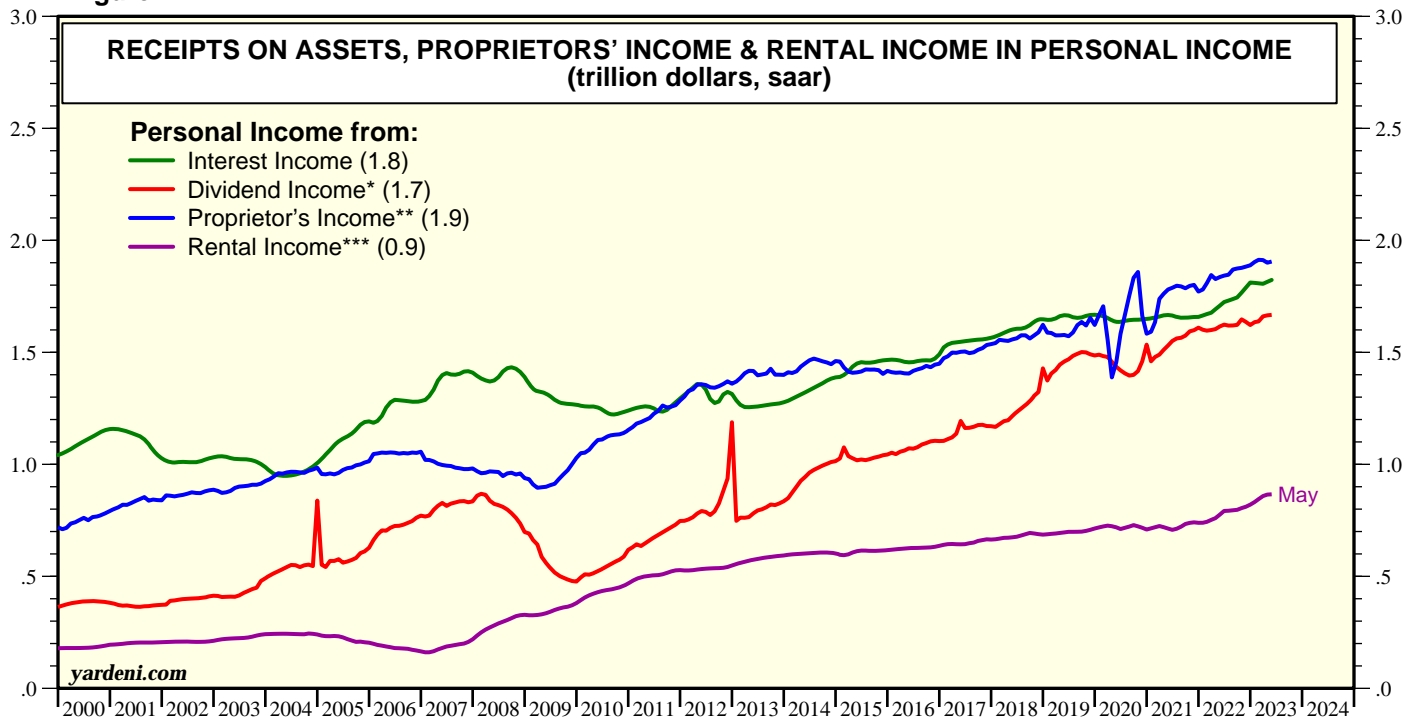
* Aggregate weekly hours times average hourly earnings of total private industries times 52.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Bureau of Labor Statistics and Bureau of Economic Analysis.

Figure 6.



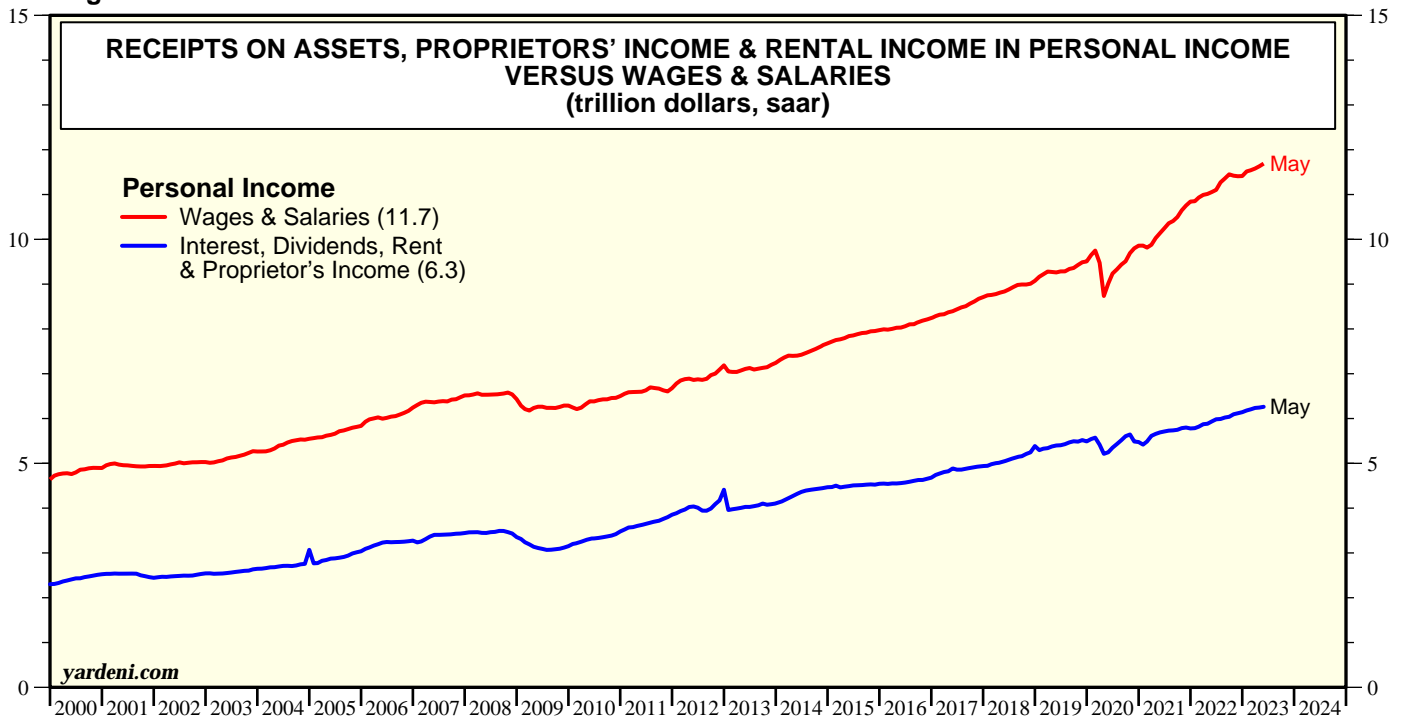
* Aggregate weekly hours times average hourly earnings of total private industries times 52. Deflated by headline PCED.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Bureau of Labor Statistics and Bureau of Economic Analysis.

Figure 7.



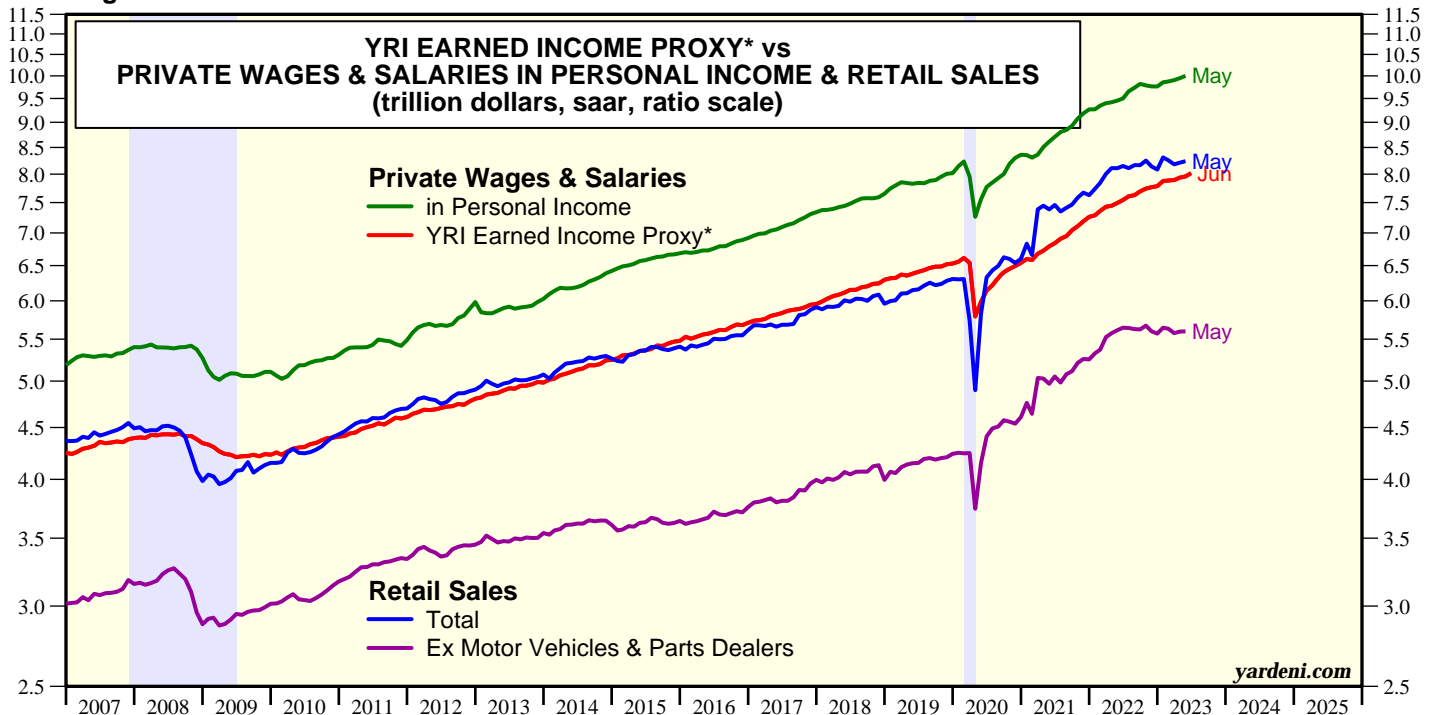
* Includes dividends from S corporations.
 ** From unincorporated private business. Includes Inventory Valuation Adjustment and Capital Consumption Adjustment.
 *** Includes rent of tenant-occupied housing and imputed rent of owner-occupied housing. Includes Capital Consumption Adjustment.
 Source: Bureau of Economic Analysis.

Figure 8.



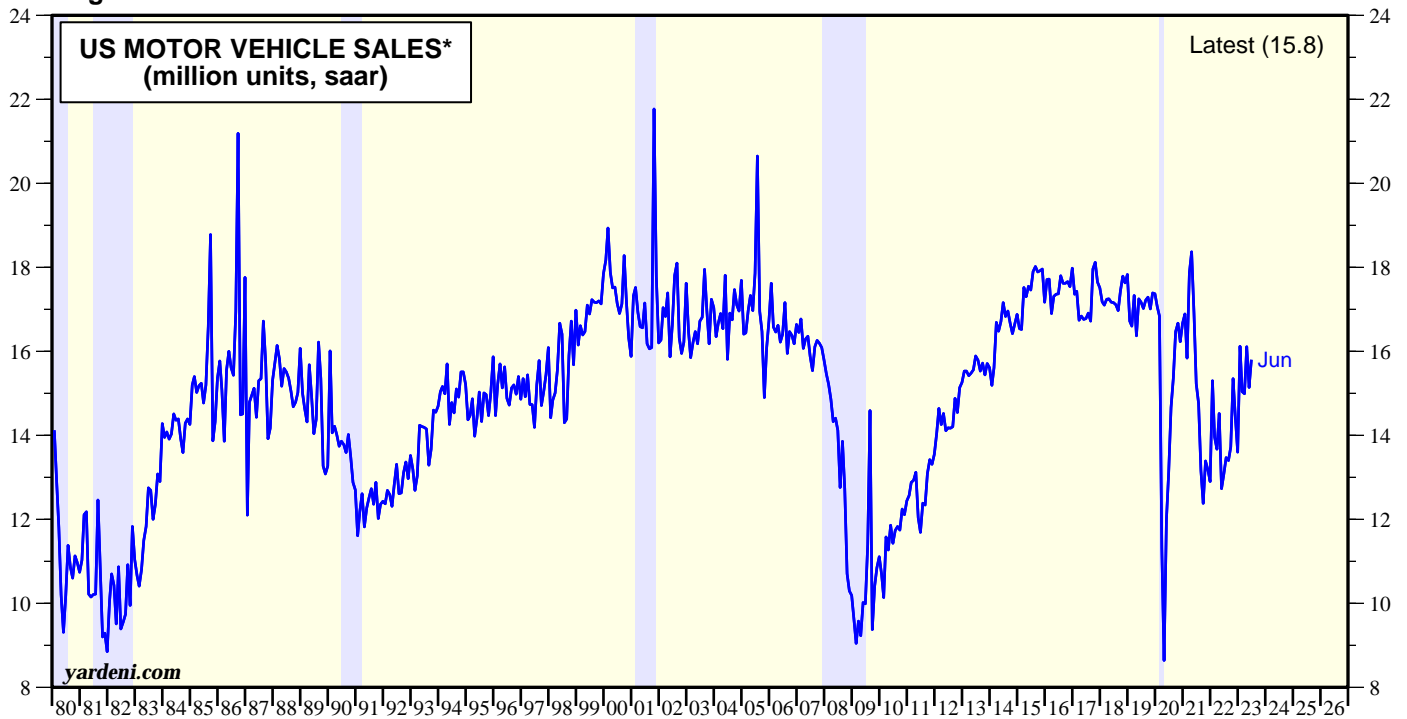
Source: Bureau of Economic Analysis.

Figure 9.



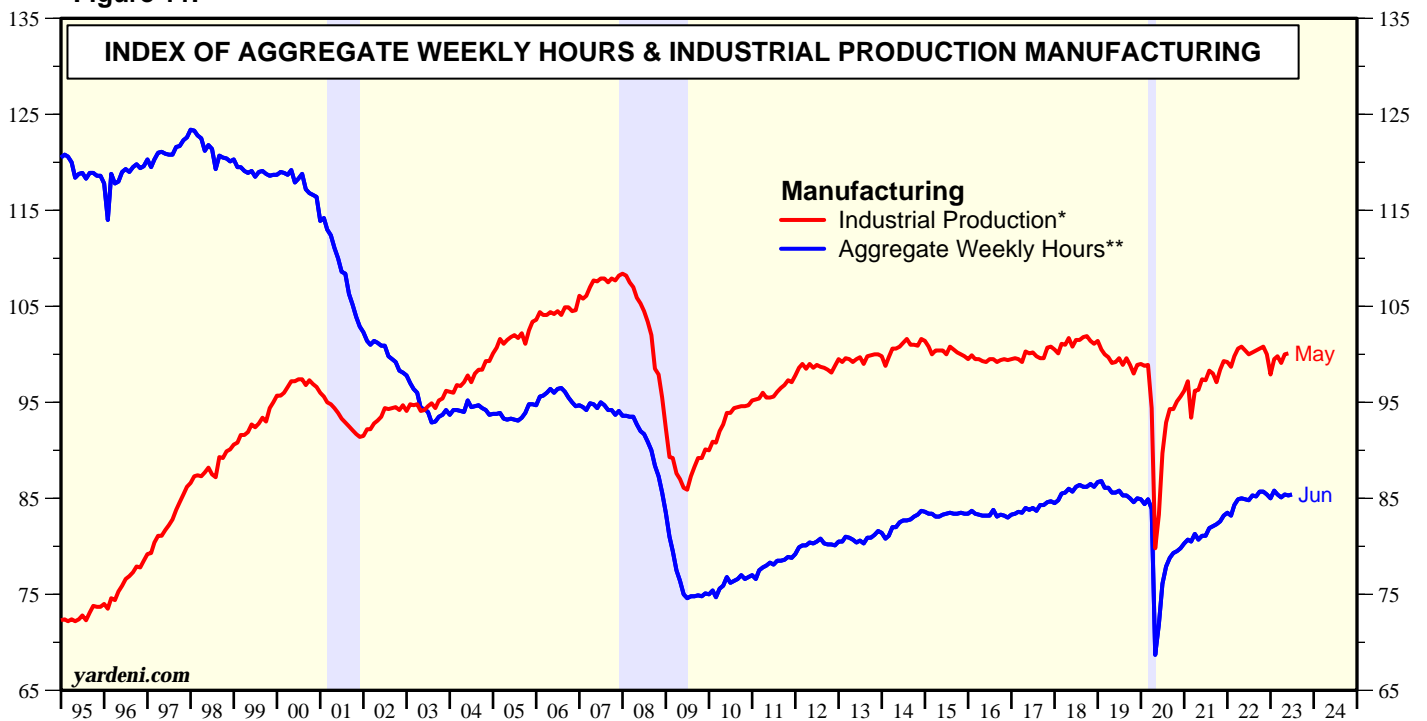
* Aggregate weekly hours times average hourly earnings of total private industries times 52.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Bureau of Labor Statistics, Census Bureau, and Bureau of Economic Analysis.

Figure 10.



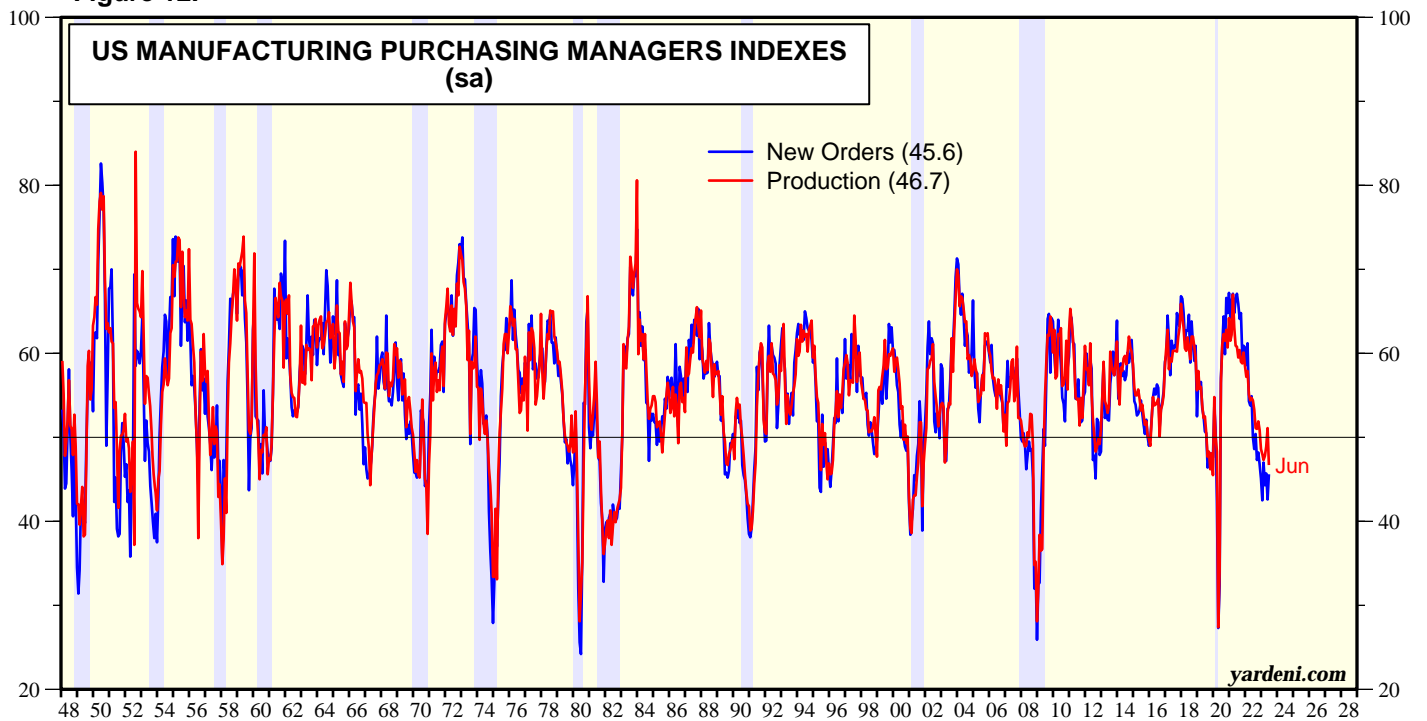
* Includes domestic cars, light trucks, and imports.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Autodata and Haver Analytics.

Figure 11.



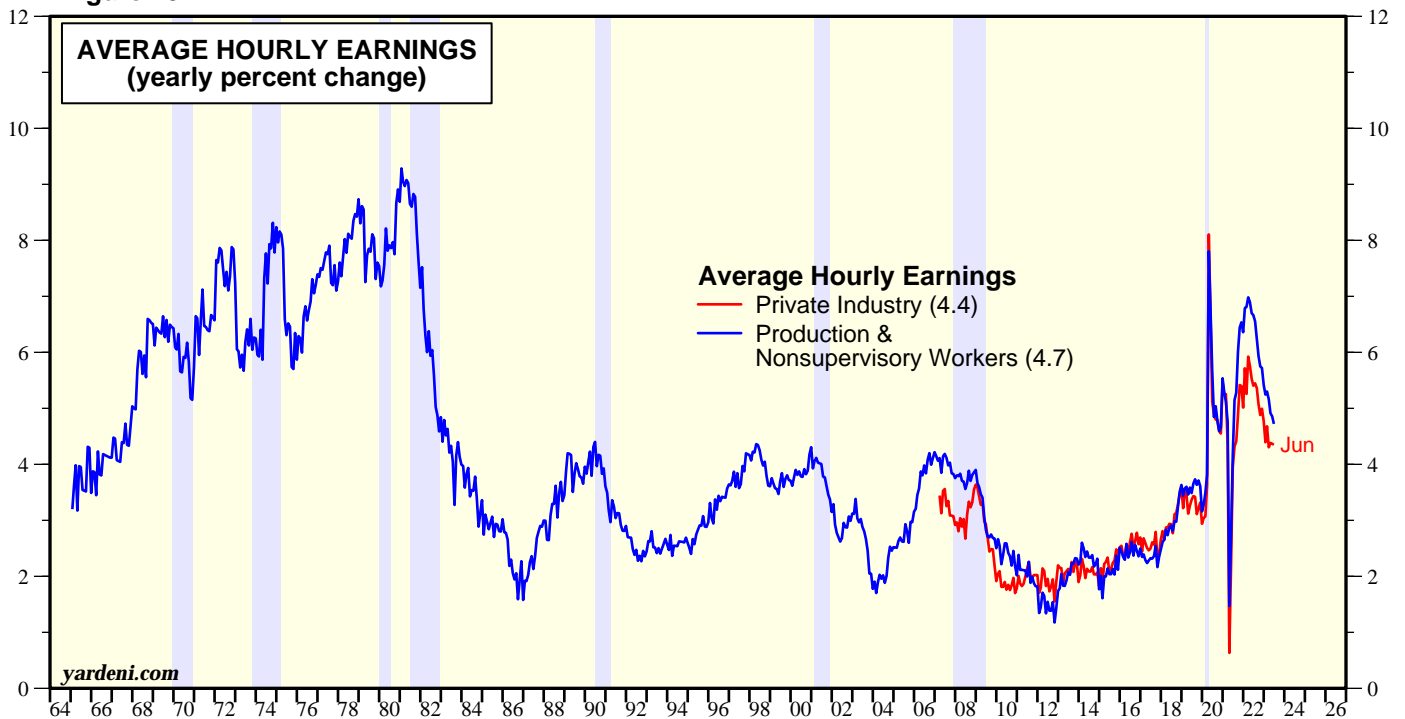
* 2017=100.
 ** 2002=100.
 Source: Bureau of Labor Statistics and Federal Reserve Board.

Figure 12.



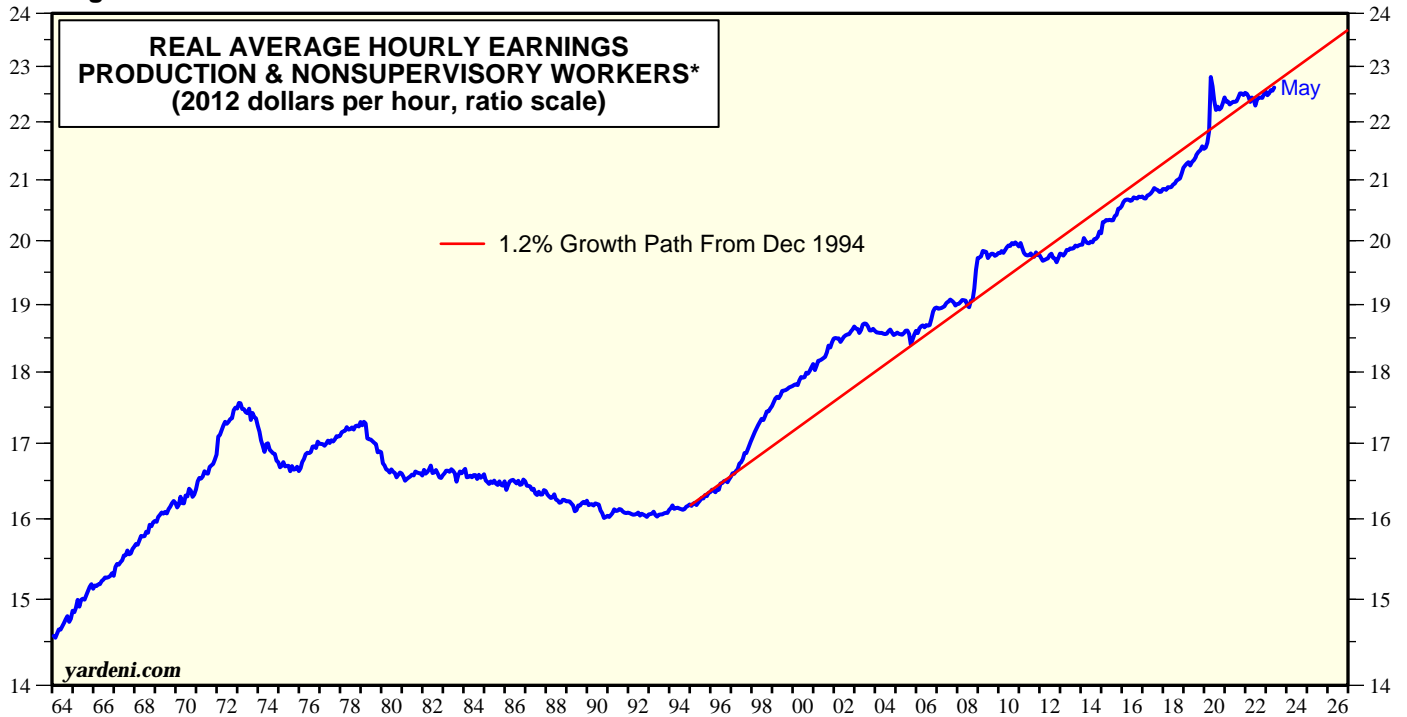
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Institute for Supply Management.

Figure 13.



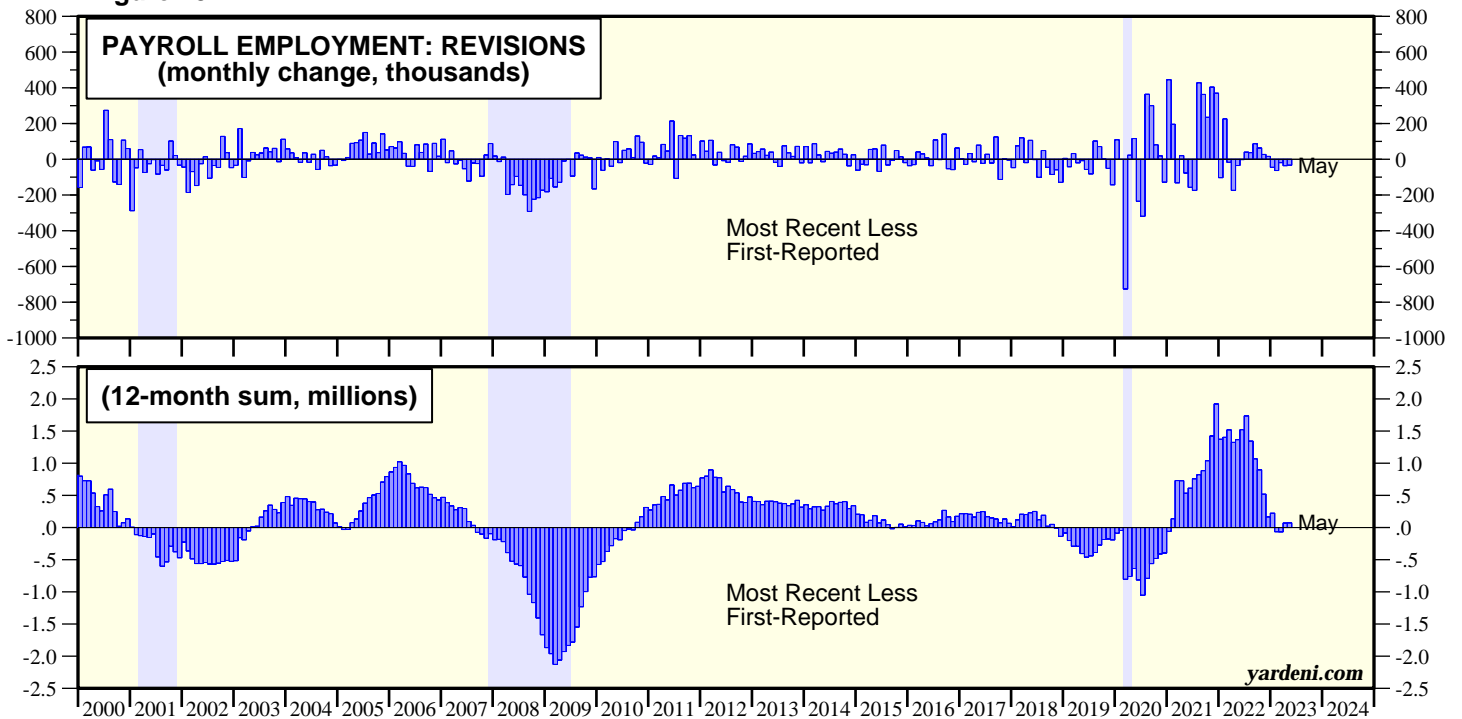
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Bureau of Labor Statistics.

Figure 14.



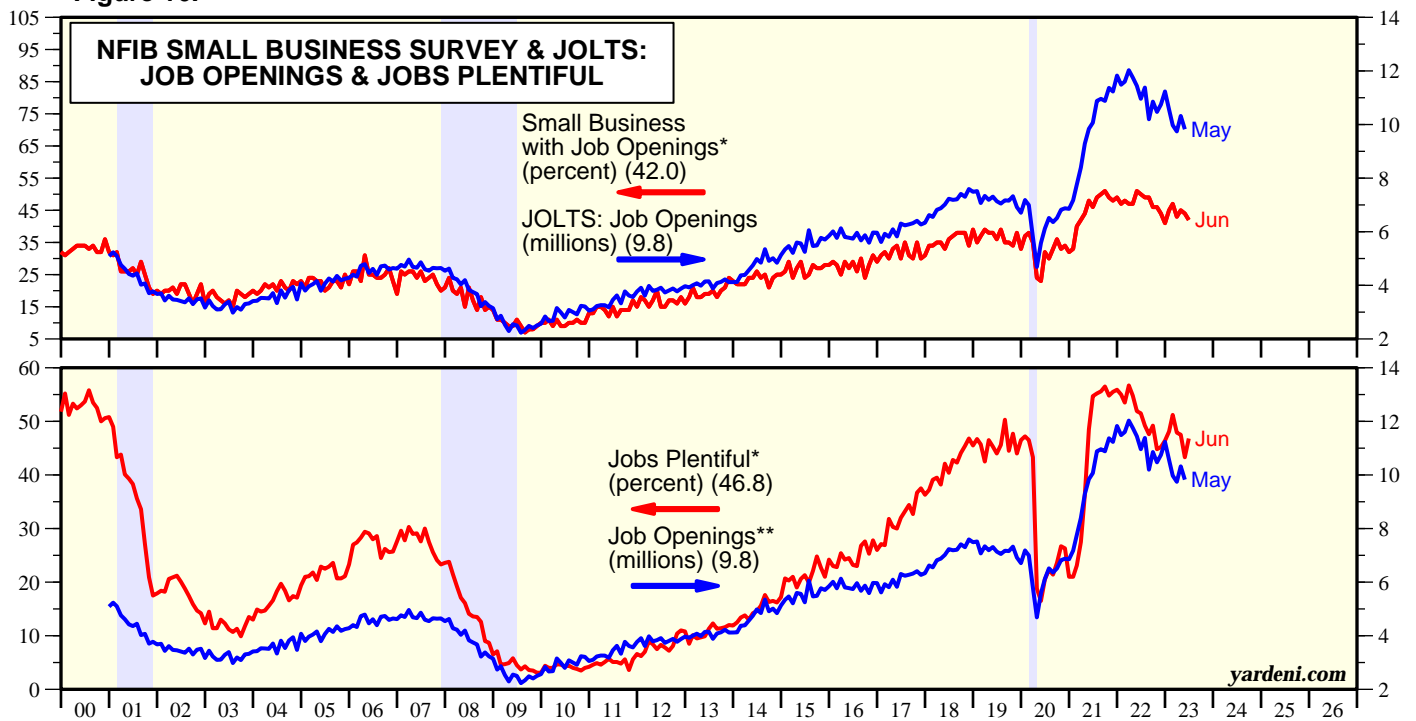
* Average hourly earnings deflated by personal consumption expenditures deflator.
Source: Bureau of Labor Statistics, Bureau of Economic Analysis, and Haver Analytics.

Figure 15.



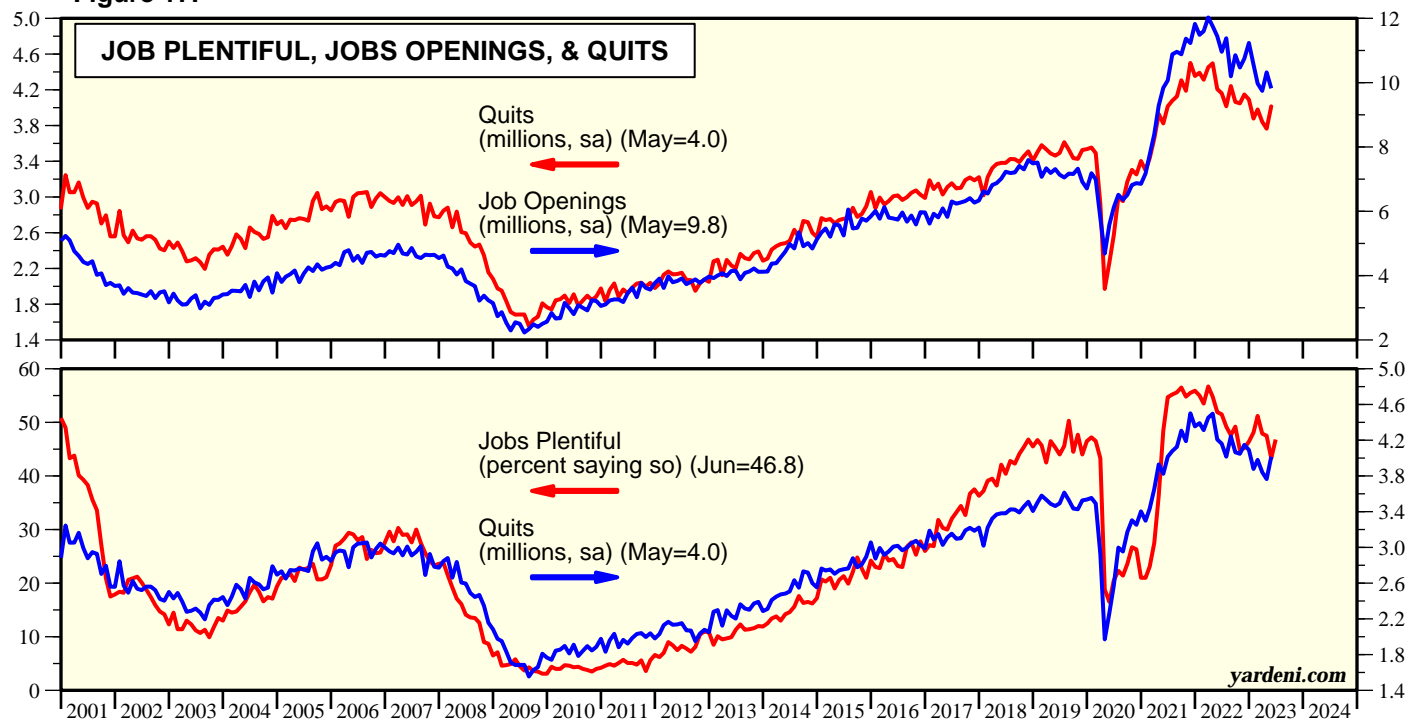
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Bureau of Labor Statistics.

Figure 16.



* First month of every quarter from 1974 to 1986, then monthly.
Note: Shaded areas denote recessions according to the National Bureau of Economic Research.
Source: National Federation of Independent Business and Bureau of Labor Statistics.

Figure 17.



Source: Bureau of Labor Statistics and The Conference Board.

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