

Chart Collection for Morning Briefing

Yardeni Research, Inc.

July 26, 2023

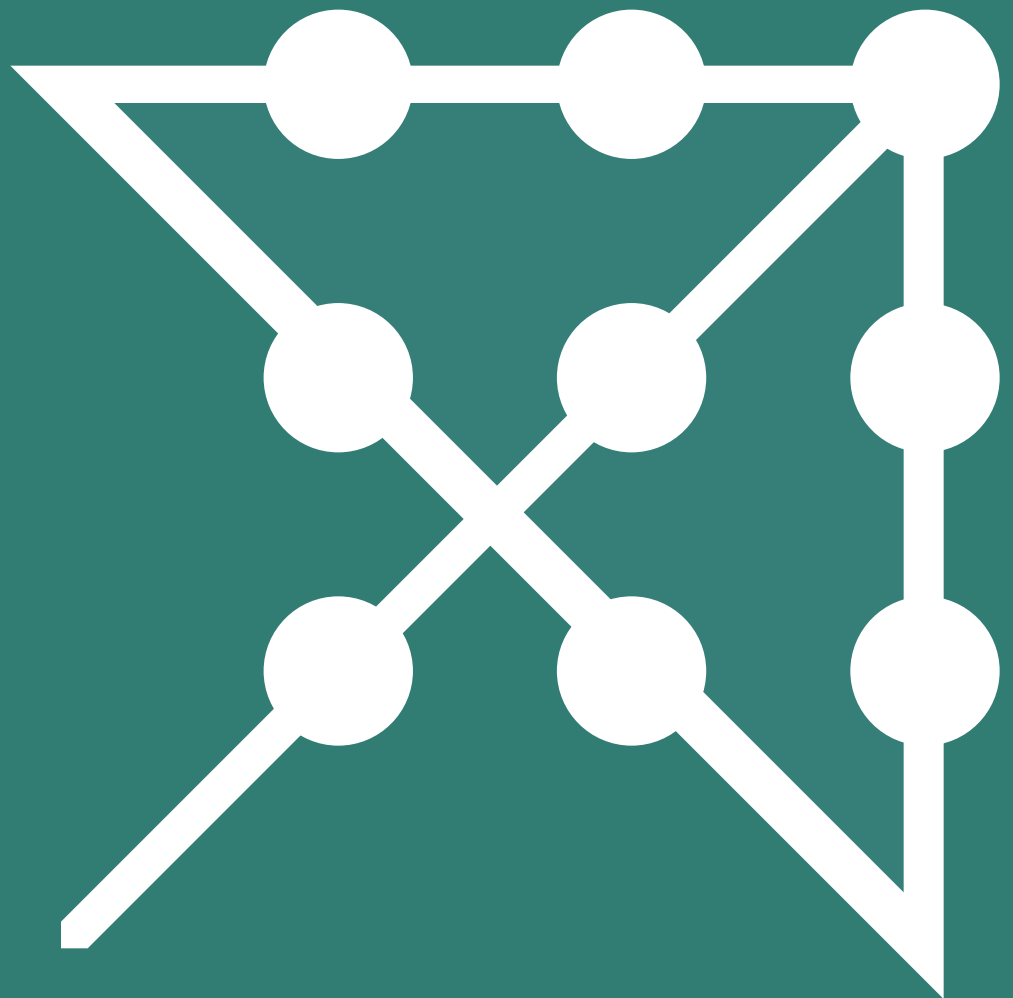
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Mali Quintana

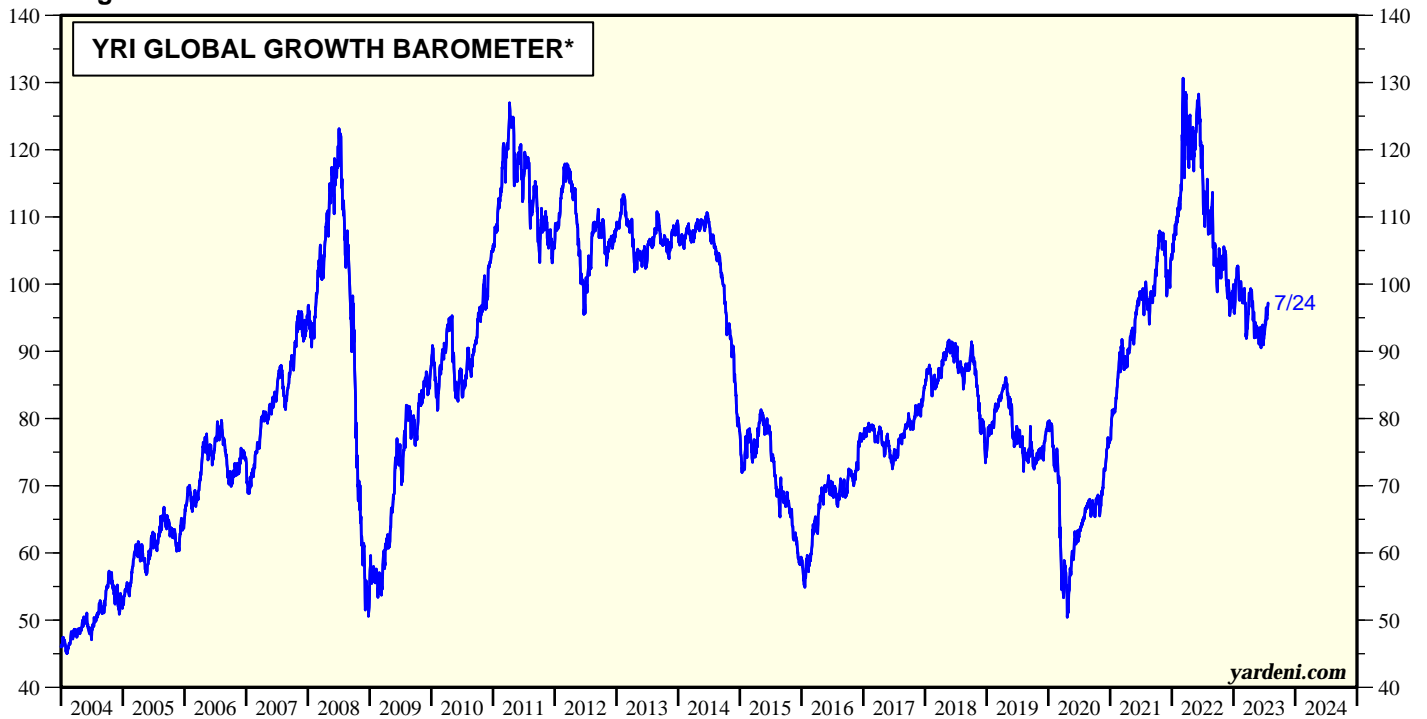
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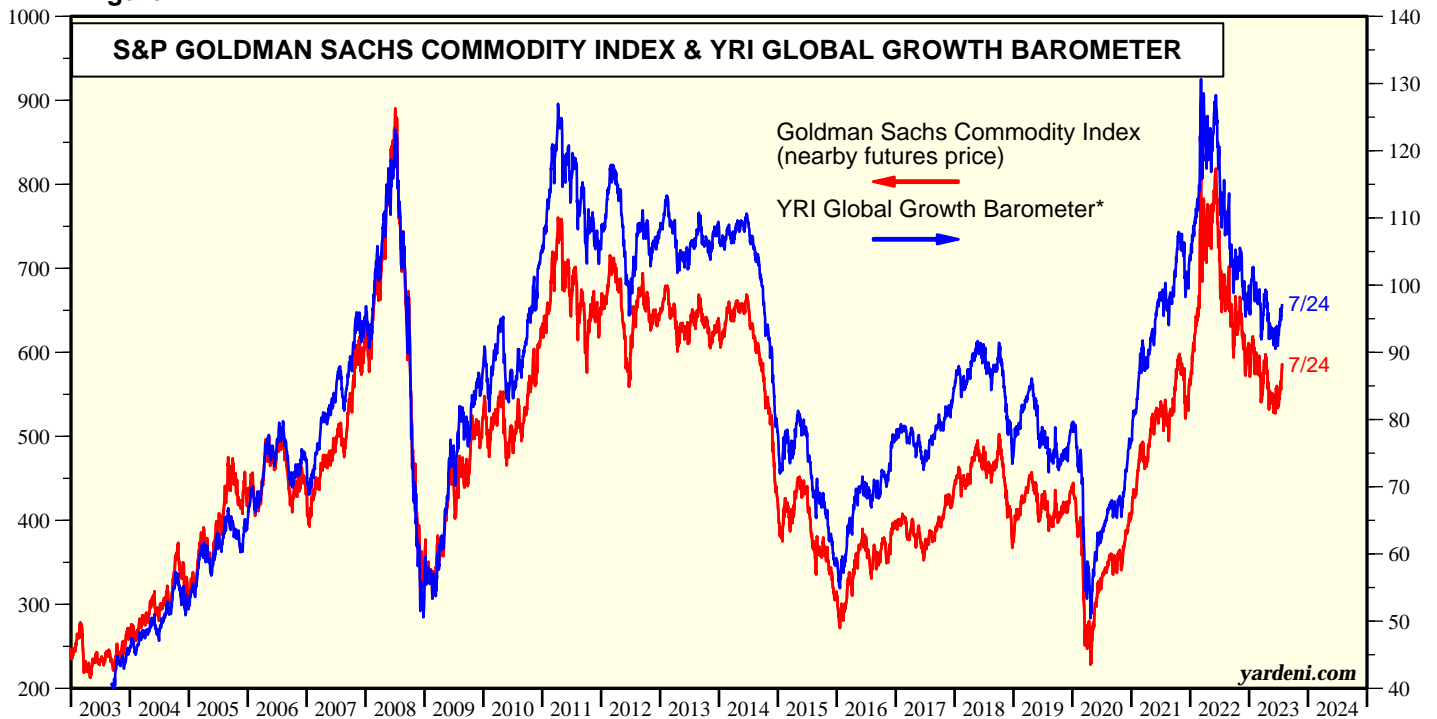
thinking outside the box

Figure 1.



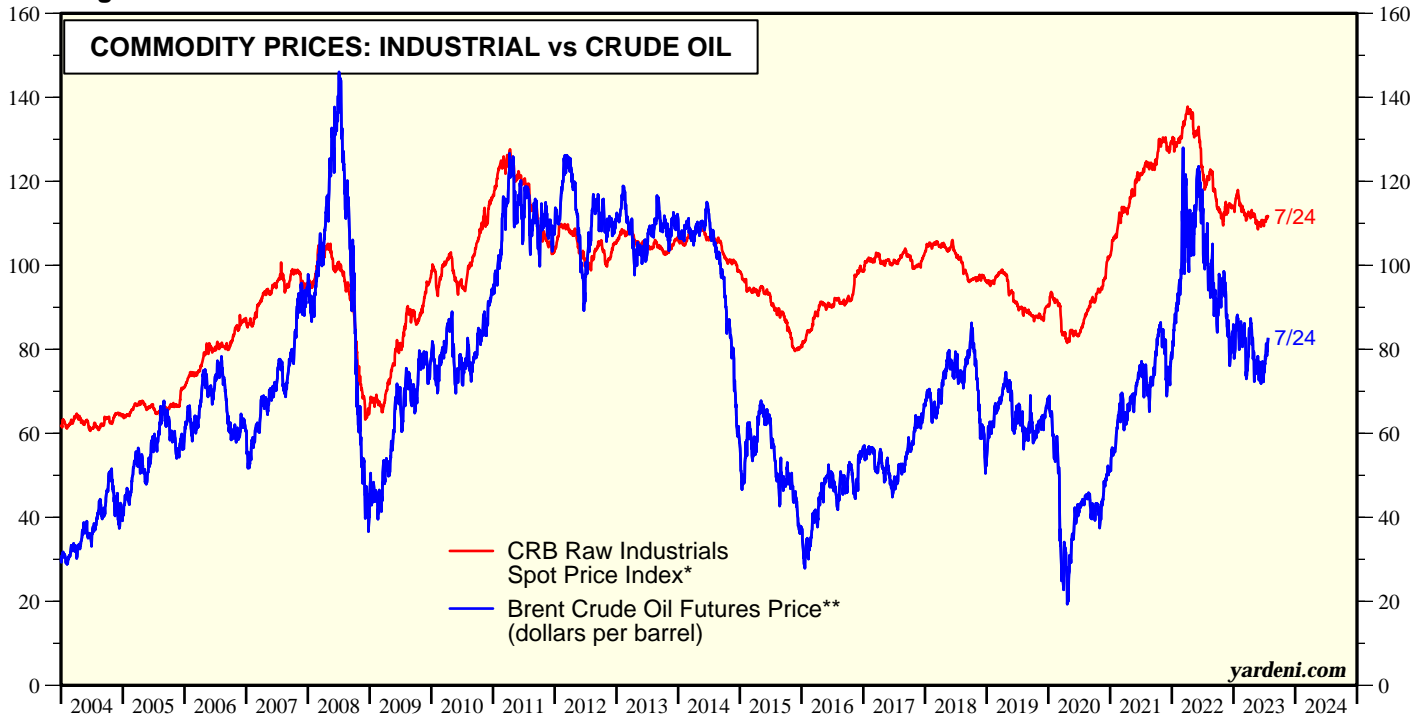
* Average of Brent crude oil nearby futures price and CRB raw industrials index (multiplied by 2 and divided by 10).
Source: The Commodity Research Bureau and Haver Analytics.

Figure 2.



* Average of Brent crude oil nearby futures price and CRB raw industrials spot price index (multiplied by 2 and divided by 10).
Source: Commodity Research Bureau, Standard & Poor's, and Haver Analytics.

Figure 3.

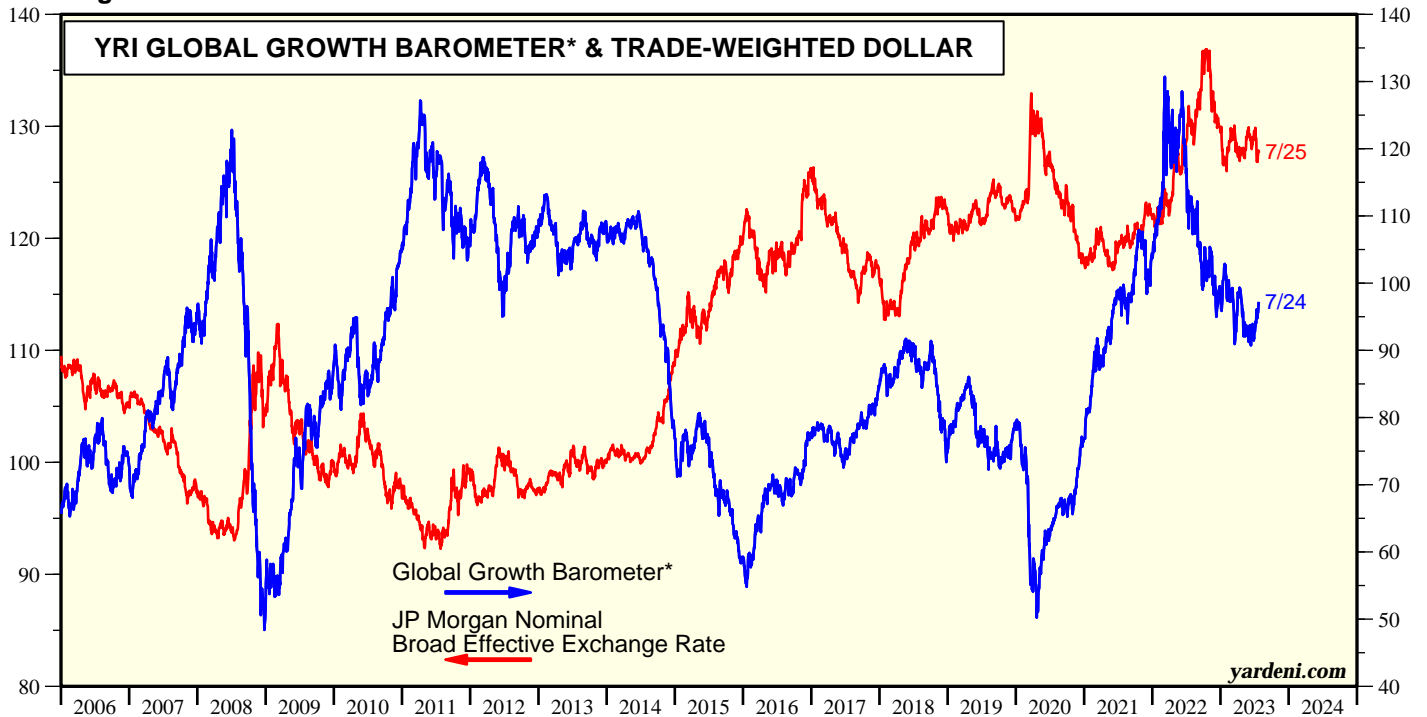


* Times 2 divided by 10. Includes copper scrap, lead scrap, steel scrap, tin, zinc, burlap, cotton, print cloth, wool tops, hides, rosin, rubber, and tallow.

** Nearby futures price.

Source: The Commodity Research Bureau and Haver Analytics.

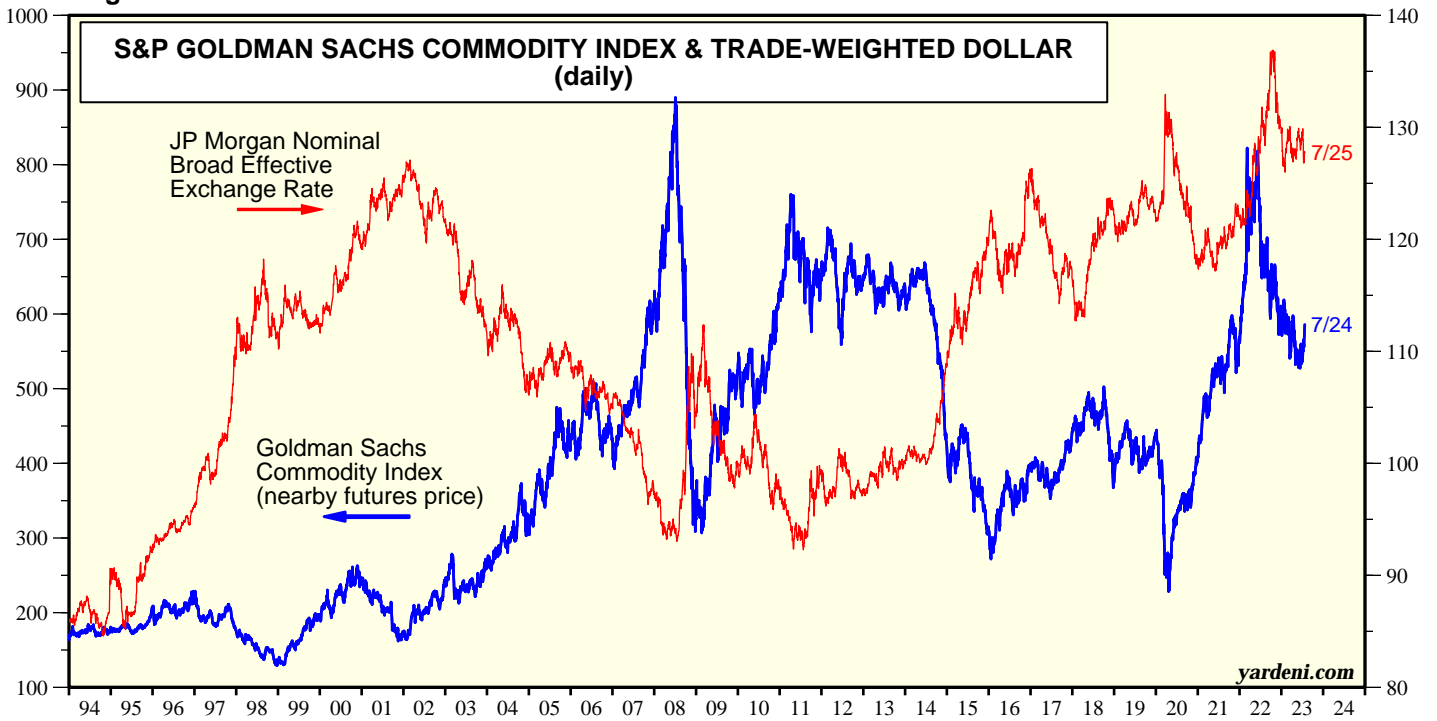
Figure 4.



* Average of Brent crude oil nearby futures price and CRB raw industrials spot price index (multiplied by 2 and divided by 10).

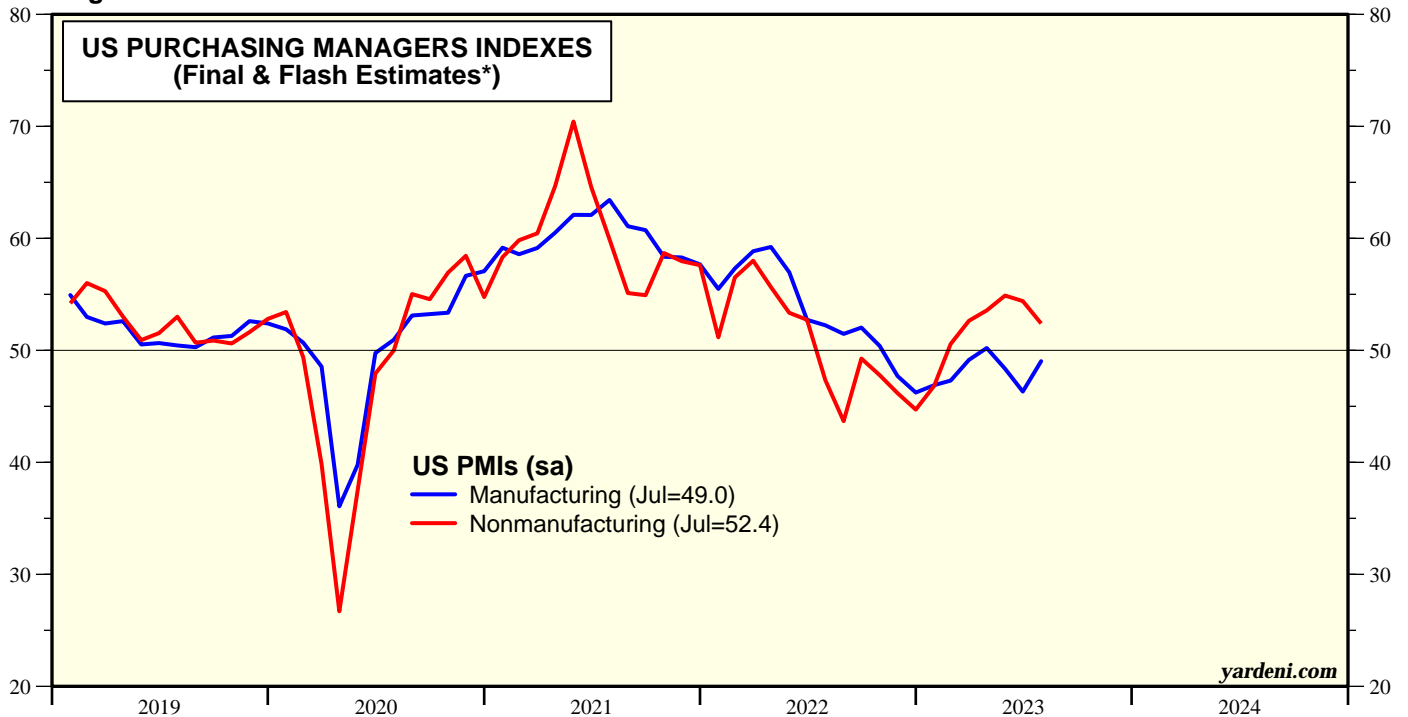
Source: Federal Reserve Board, Commodity Research Bureau, and Haver Analytics.

Figure 5.



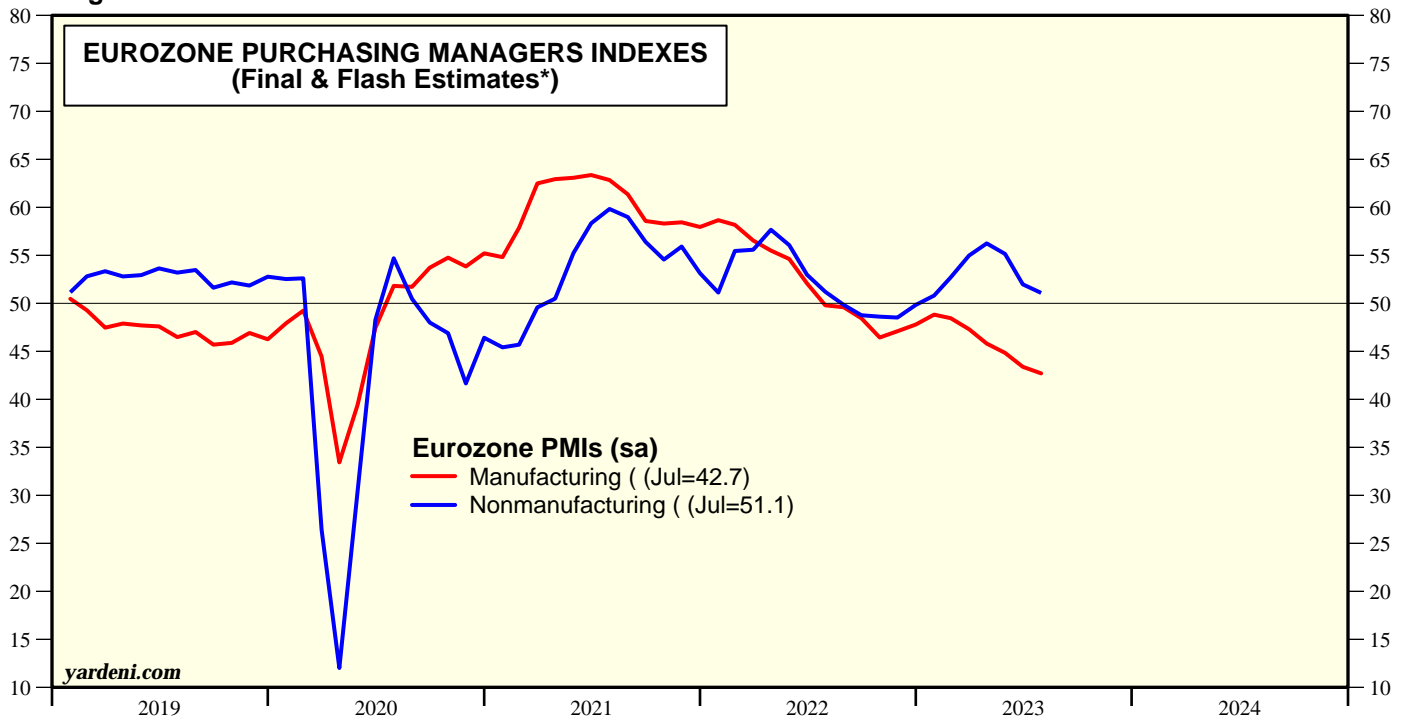
Source: Standard & Poor's, JP Morgan, and Haver Analytics.

Figure 6.



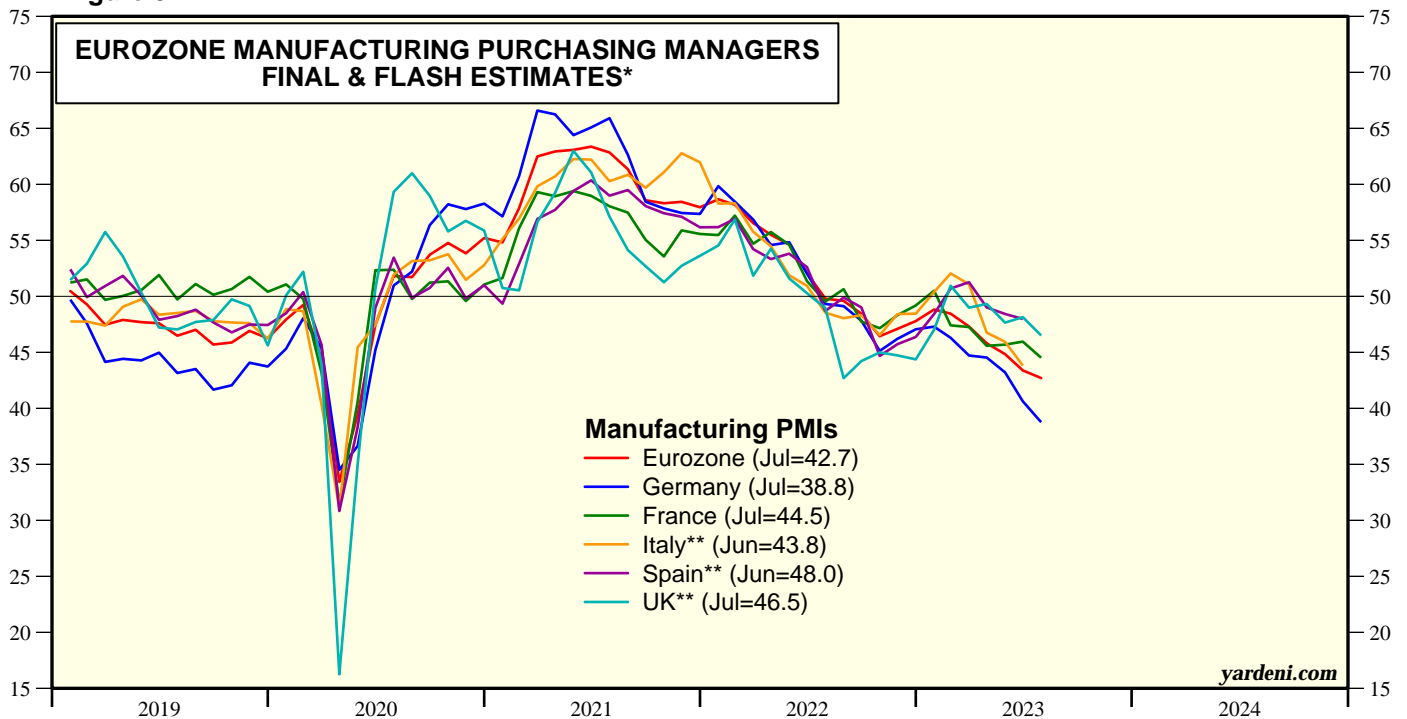
* An index above (below) 50 indicates an increase (decrease) in activity.
Source: S&P Global and Haver Analytics.

Figure 7.



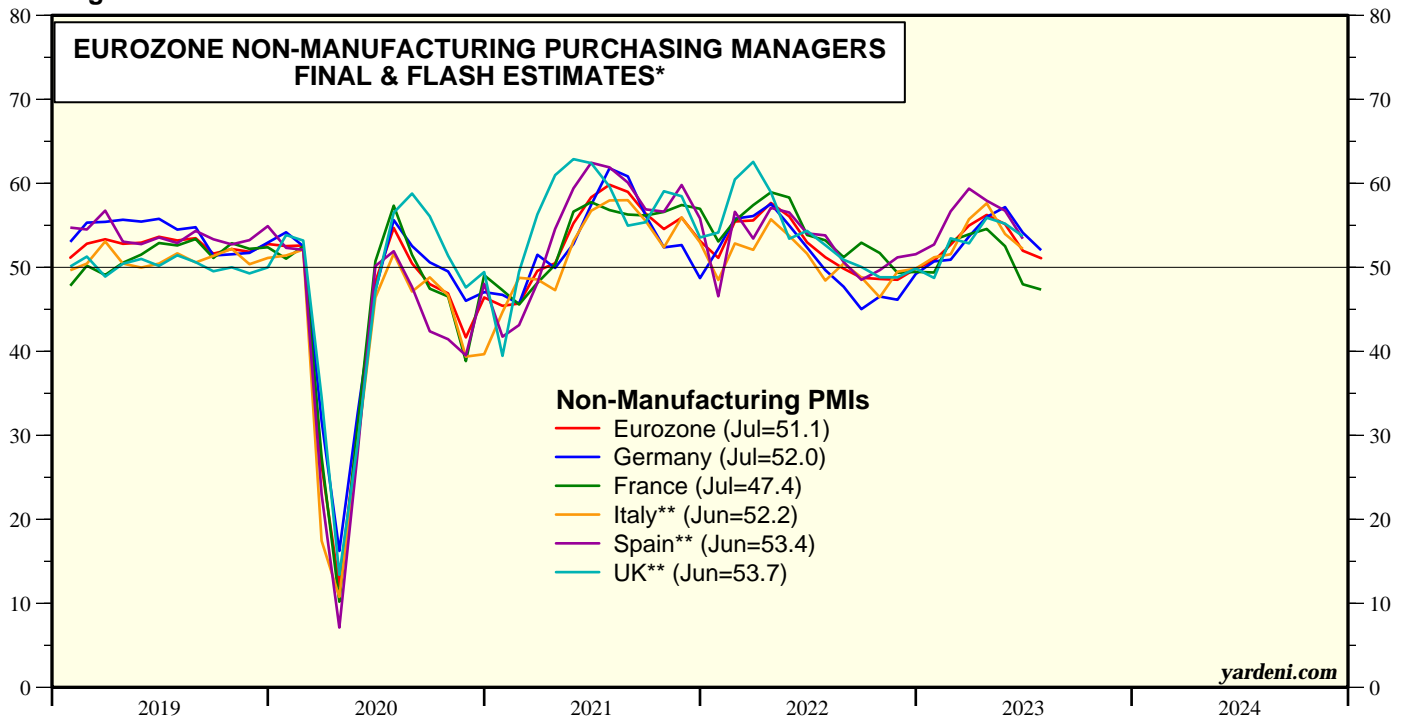
* An index above (below) 50 indicates an increase (decrease) in activity.
Source: S&P Global and Haver Analytics.

Figure 8.



* An index above (below) 50 indicates an increase (decrease) in activity.
** Flash estimates not available for Italy and Spain.
Source: HSBC, S&P Global, and Haver Analytics.

Figure 9.

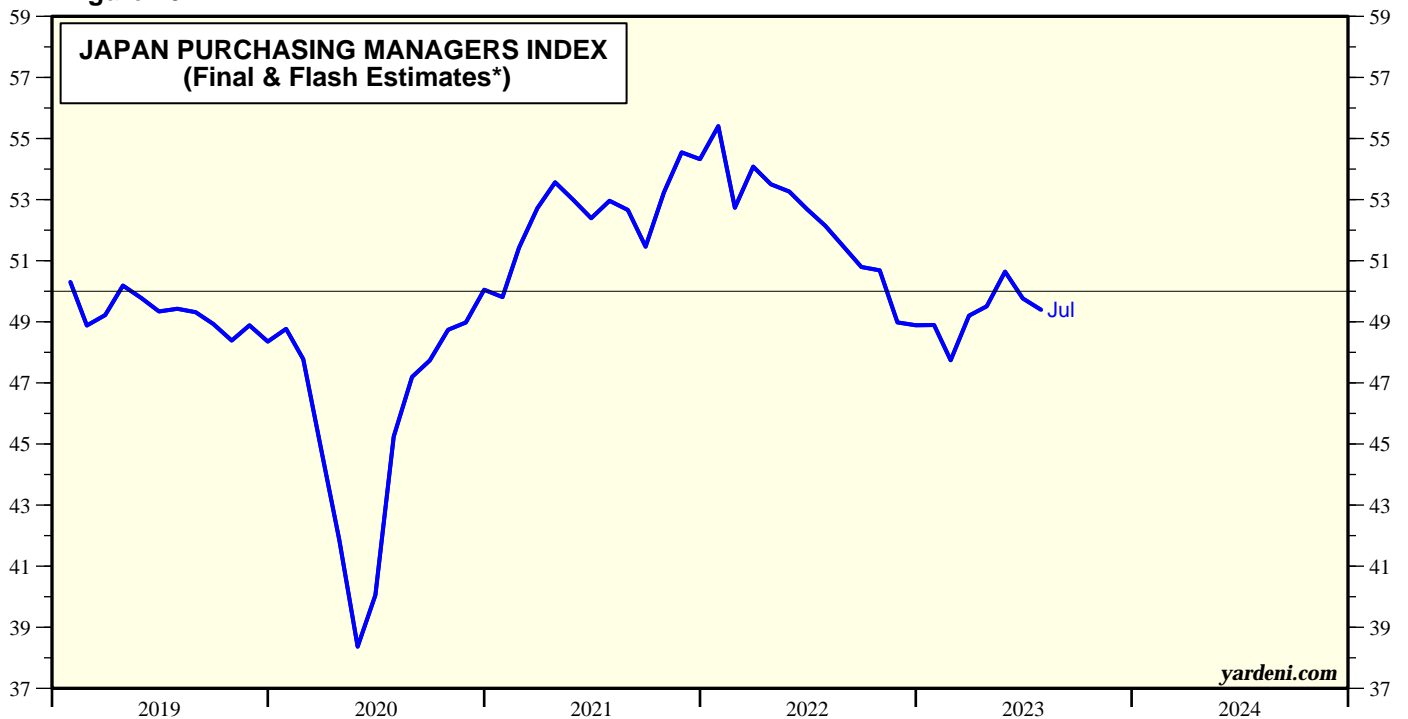


* An index above (below) 50 indicates an increase (decrease) in activity.

** Flash estimates not available for Italy, Spain, and UK.

Source: S&P Global and Haver Analytics.

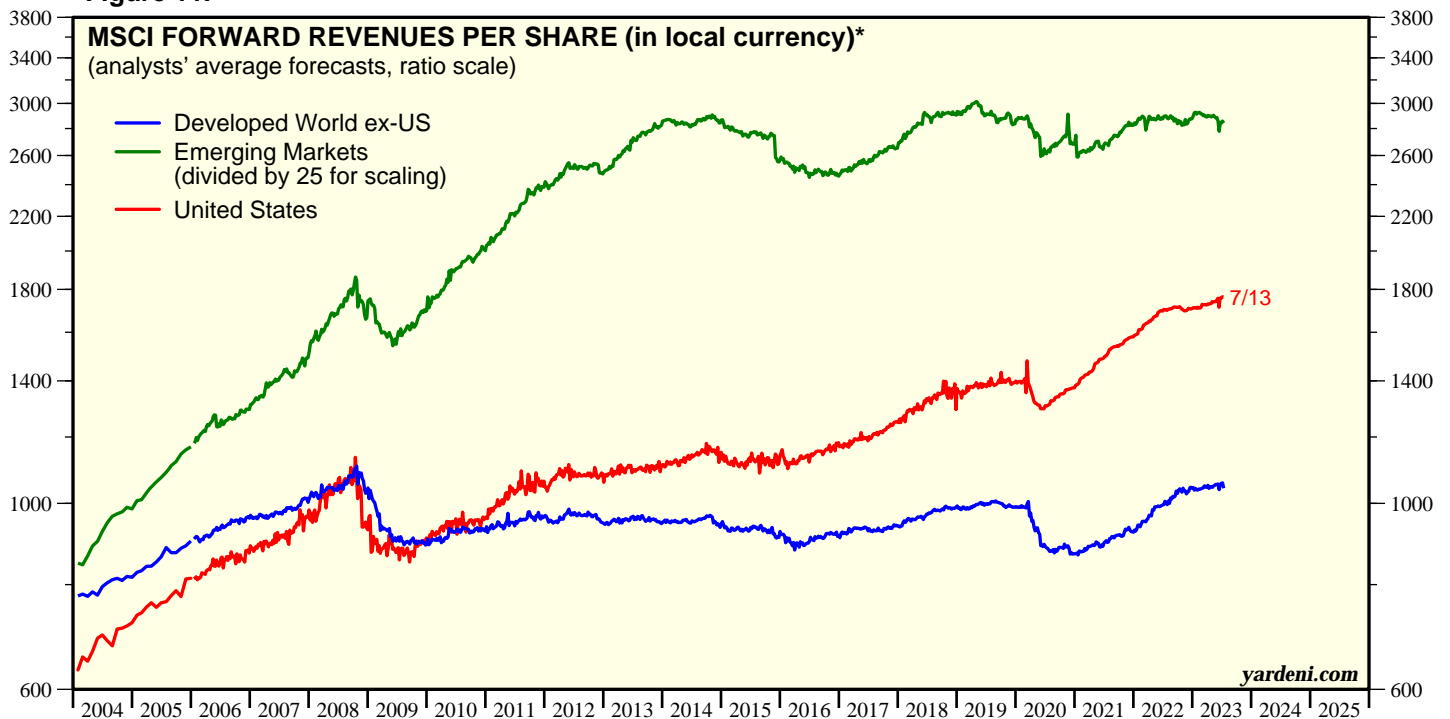
Figure 10.



* An index above (below) 50 indicates an increase (decrease) in activity.

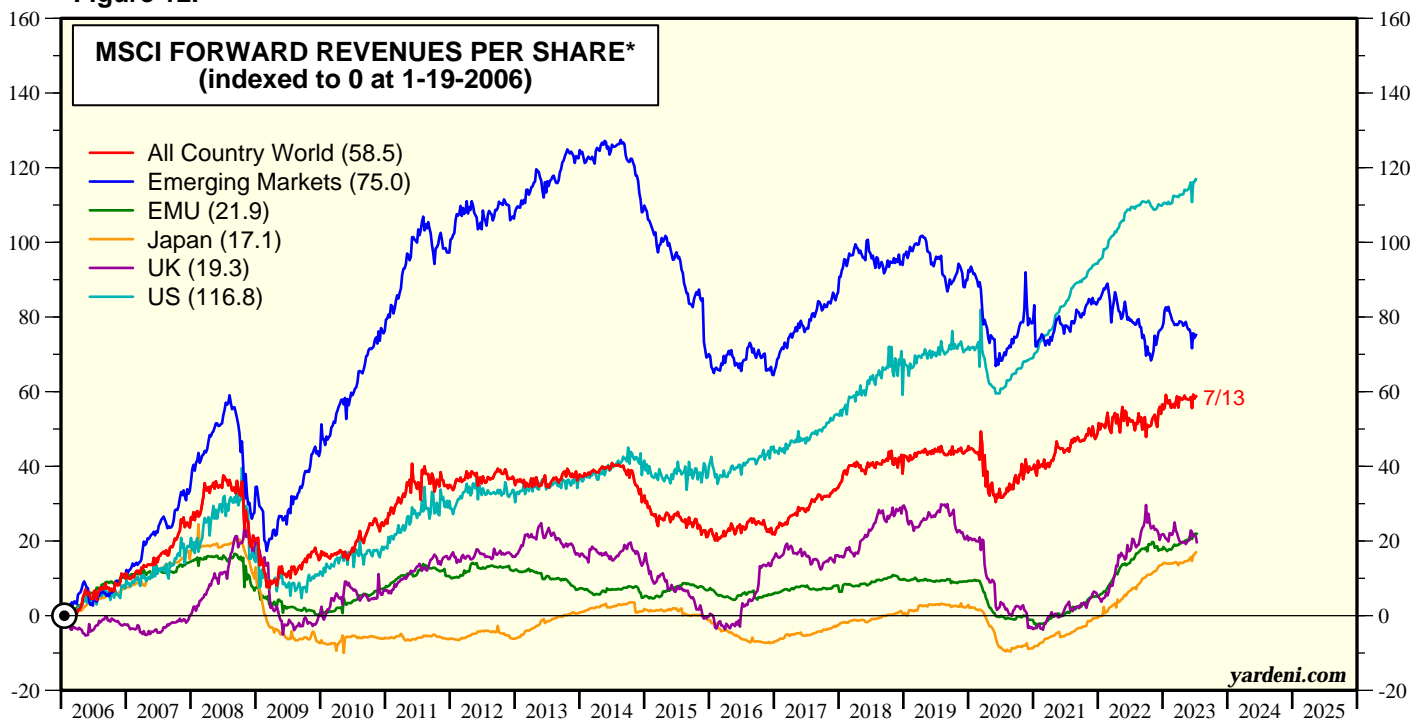
Source: S&P Global and Haver Analytics.

Figure 11.



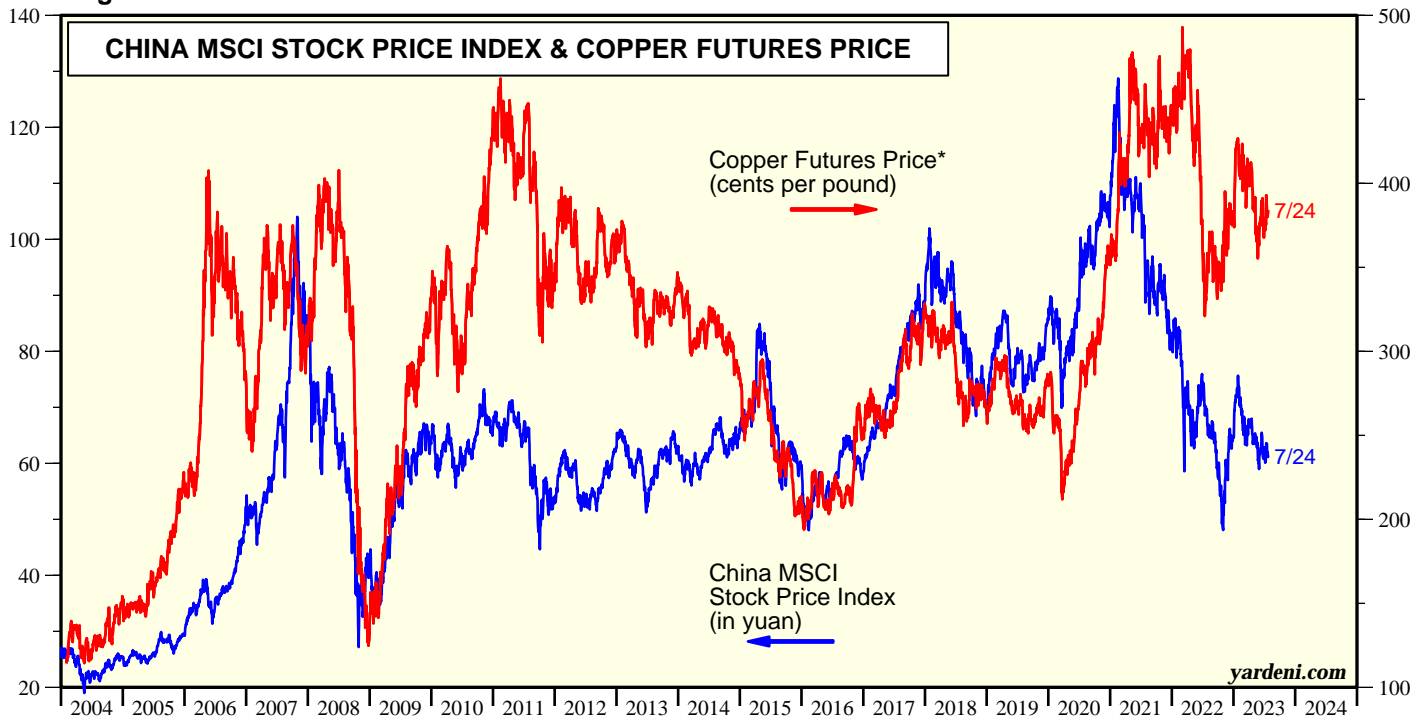
* Time-weighted average of the consensus estimates for current and next year. Monthly through December 2005, weekly thereafter.
Source: I/B/E/S data by Refinitiv.

Figure 12.



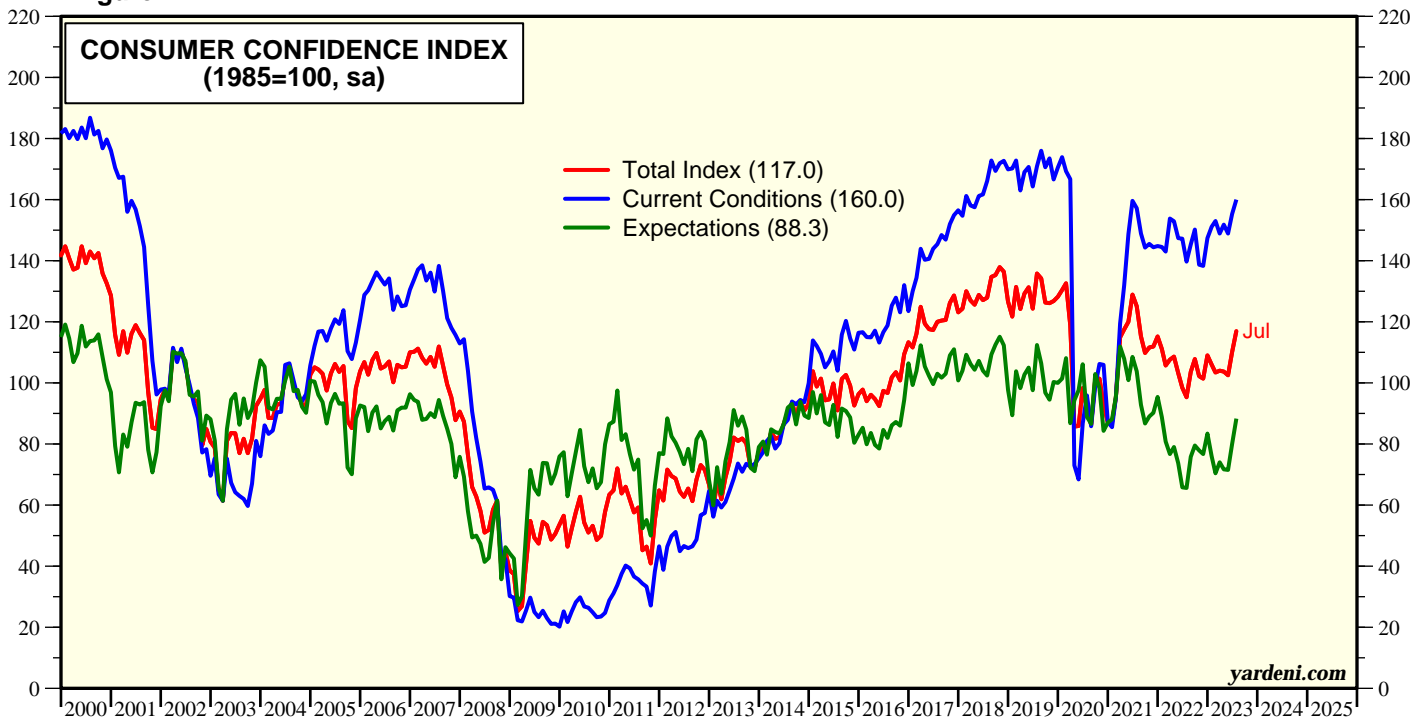
* All MSCI regions in US\$ except EMU in euros. All MSCI countries in local currency except Peru and Russia in US\$.
Source: I/B/E/S data by Refinitiv.

Figure 13.



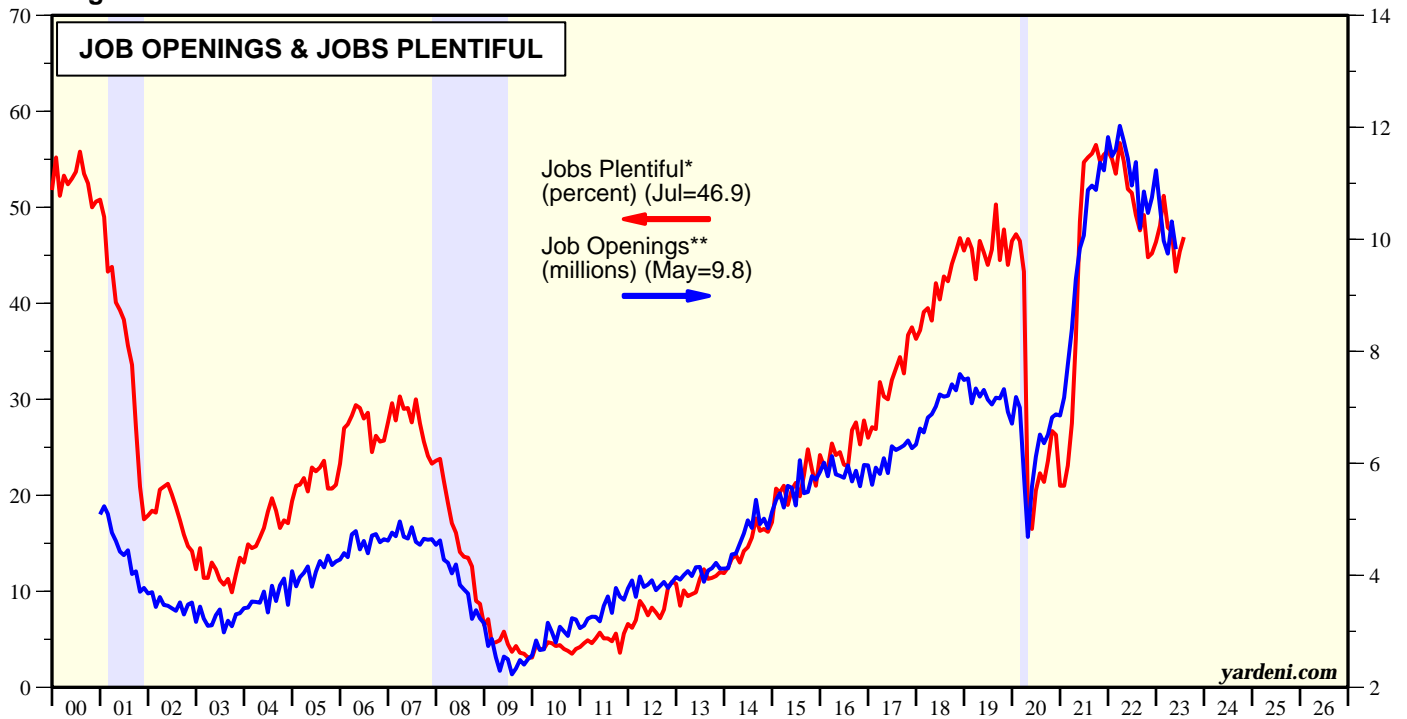
* Nearby futures contract.
Source: Morgan Stanley Capital International and Commodity Research Bureau.

Figure 14.



Source: The Conference Board.

Figure 15.



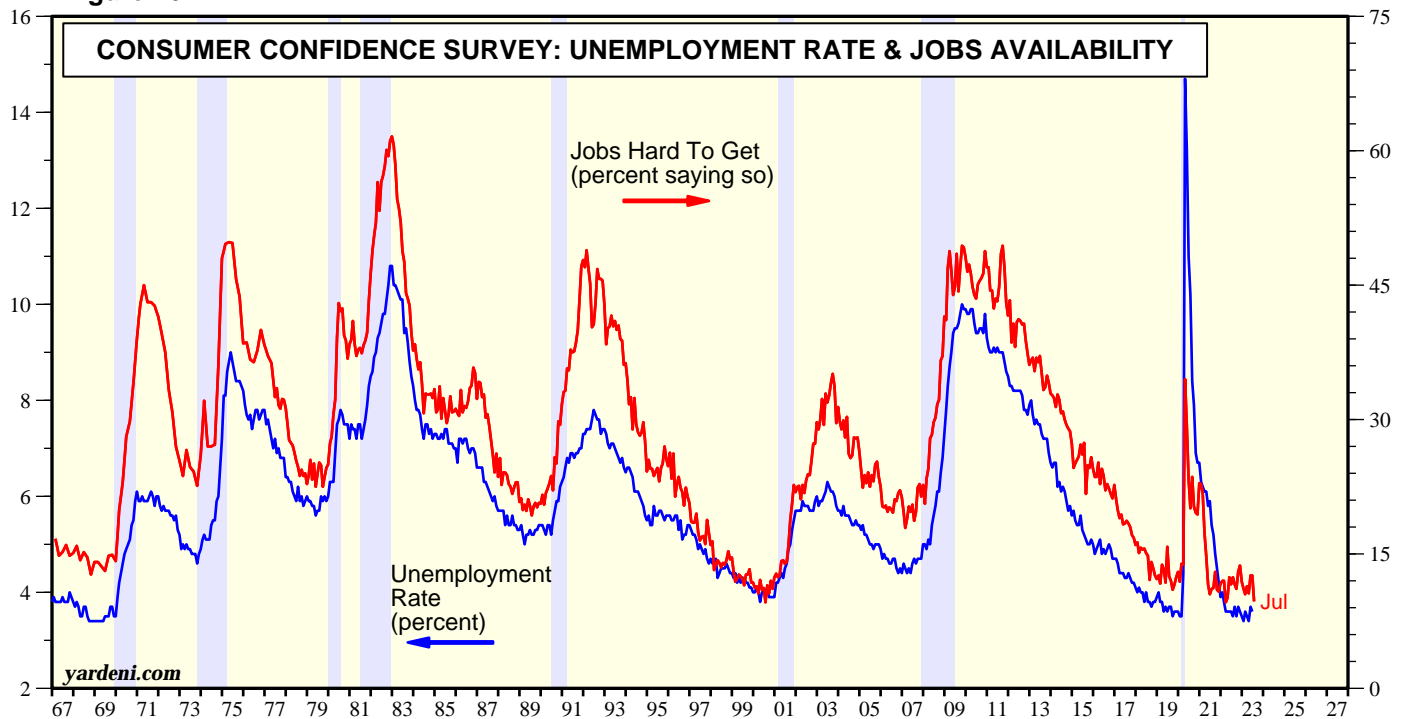
* Consumer Confidence Index survey.

** JOLTS.

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

Source: The Conference Board and Bureau of Labor Statistics.

Figure 16.



* Every other month from 1967 through mid-1977, then monthly since July 1977. Seasonally adjusted.

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

Source: The Conference Board and Bureau of Labor Statistics.

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