

Chart Collection for Morning Briefing

Yardeni Research, Inc.

September 6, 2023

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Mali Quintana

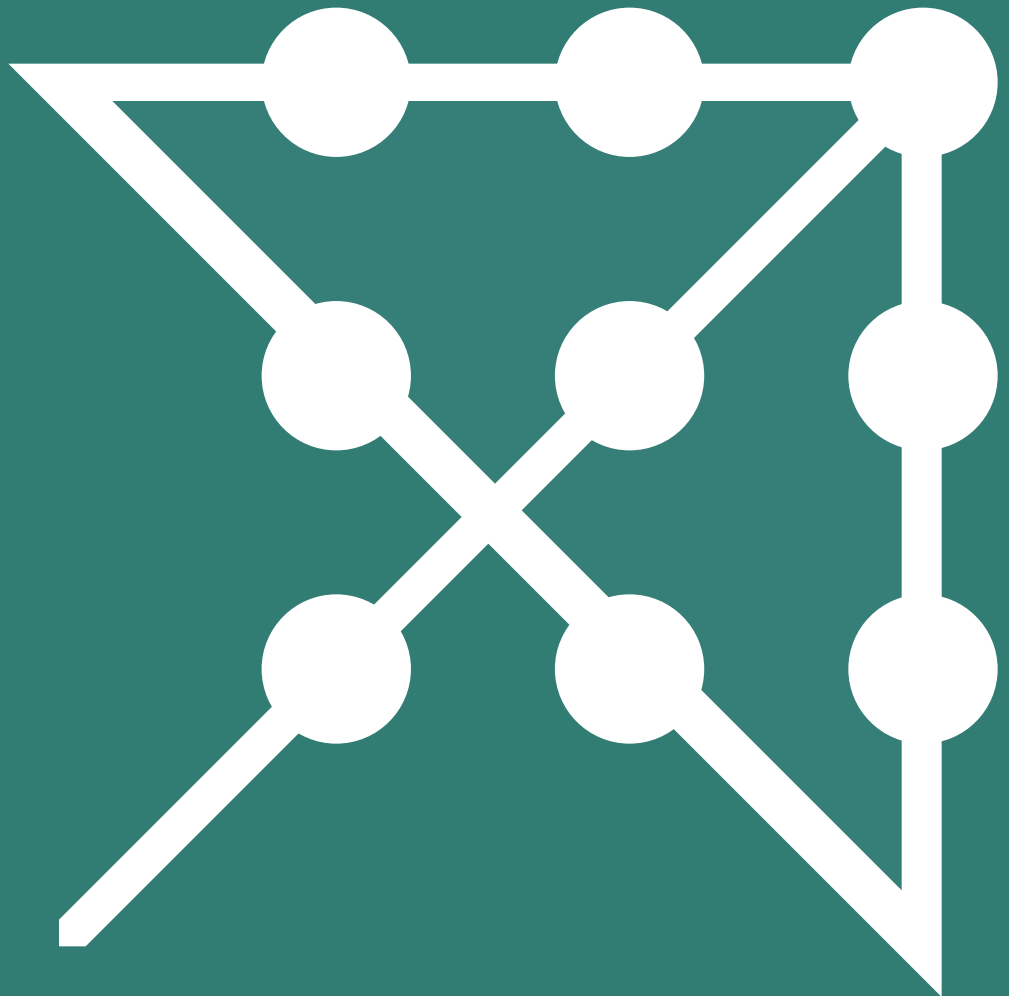
480-664-1333

aquintana@yardeni.com

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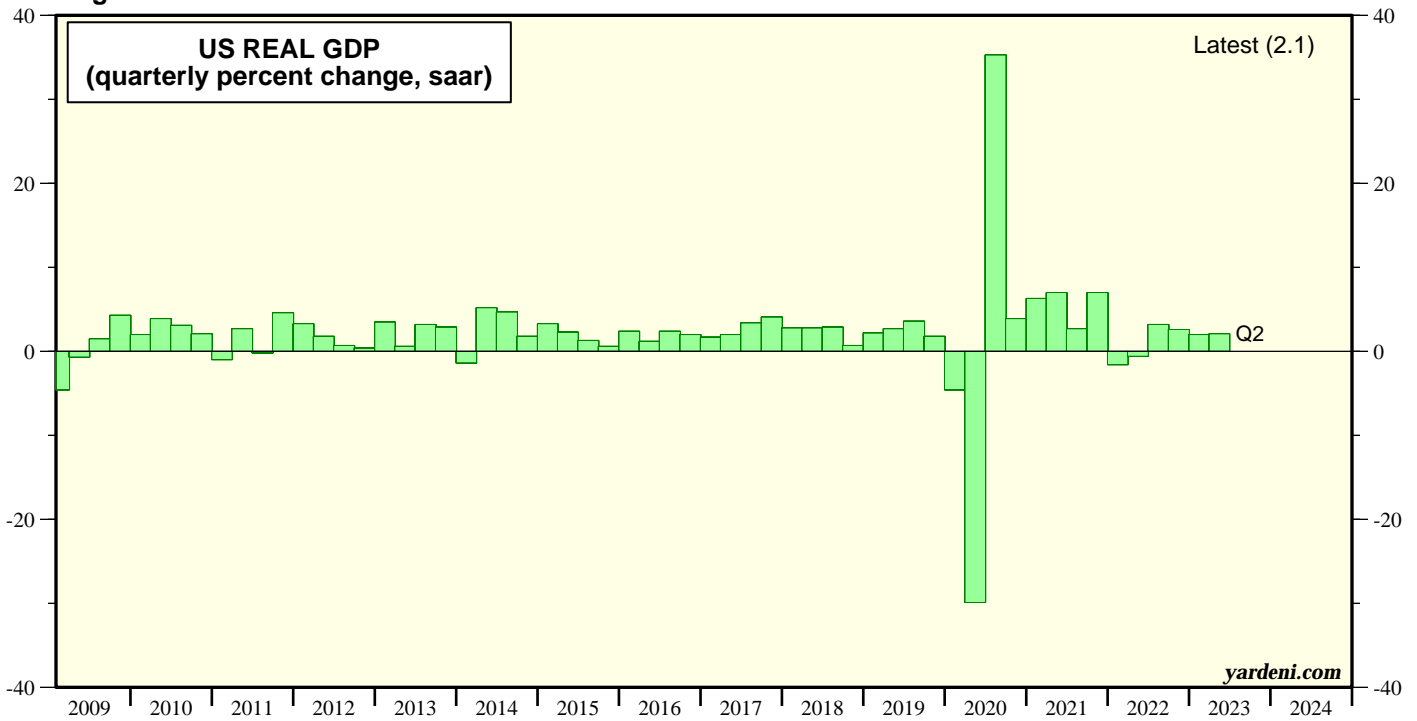
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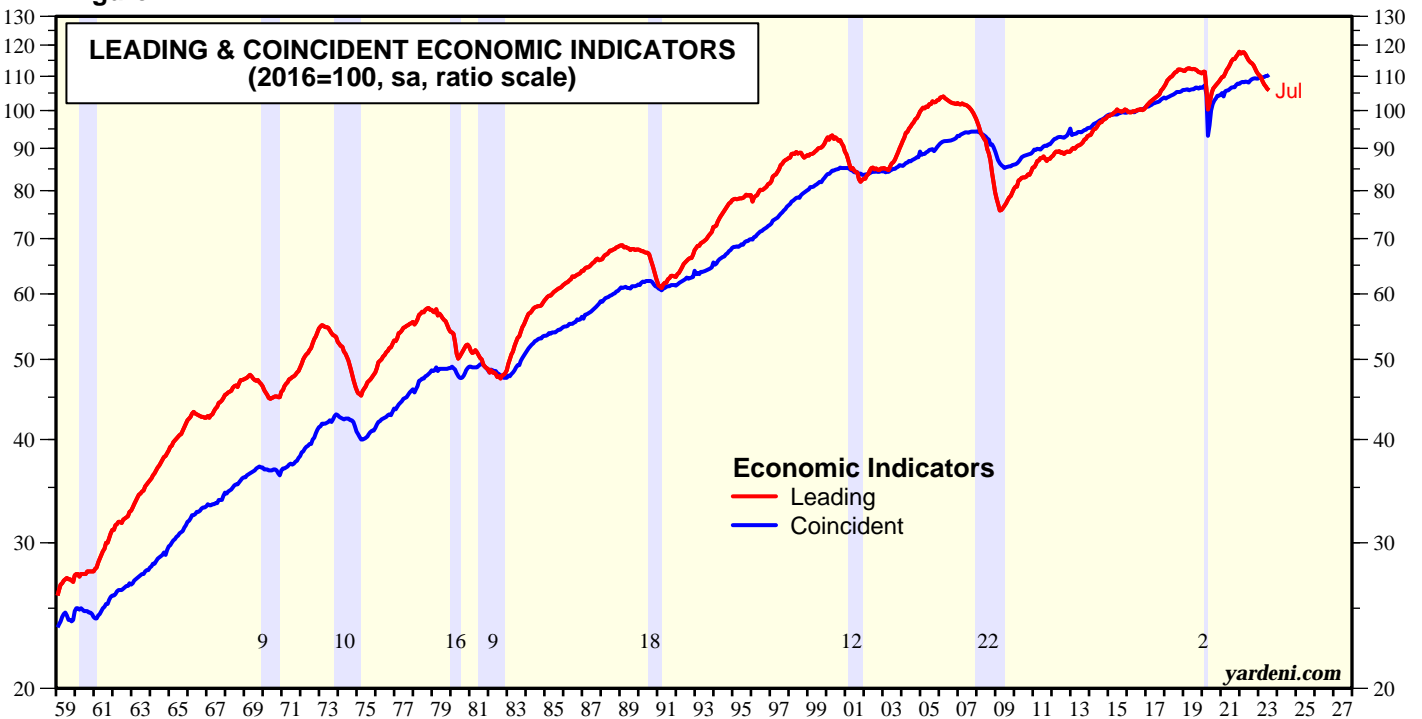
thinking outside the box

Figure 1.



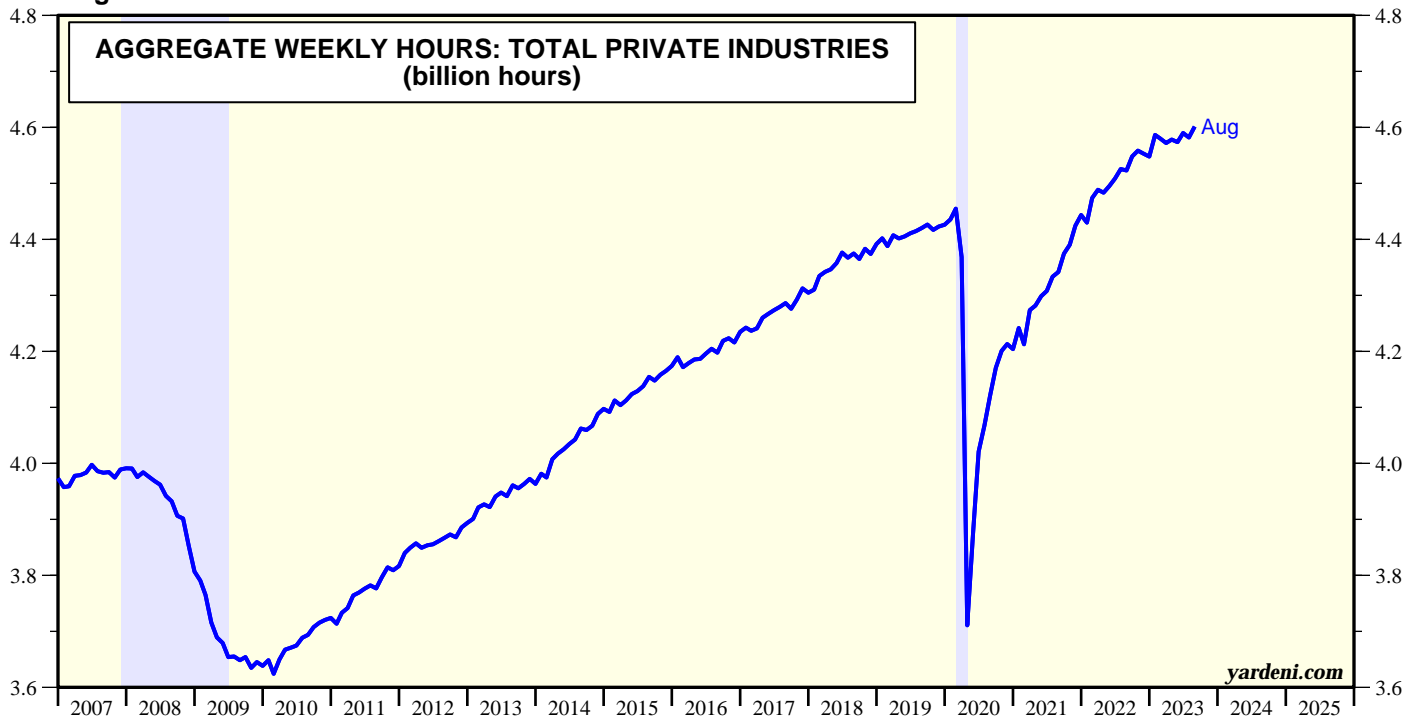
Source: Bureau of Economic Analysis.

Figure 2.



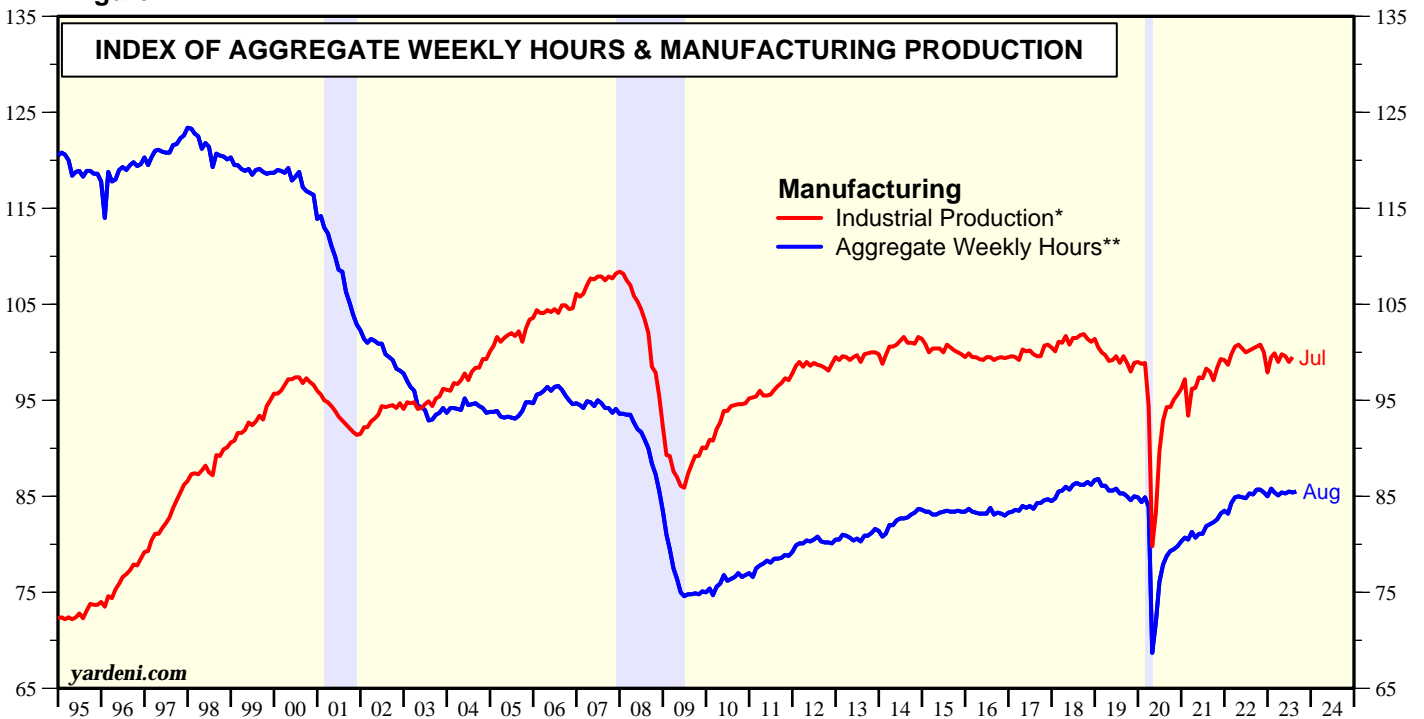
Note: Shaded areas are recessions according to the National Bureau of Economic Research. Numbers above timeline reflect number of months from peak of leading indicators to peak of business cycle.
 Source: The Conference Board.

Figure 3.



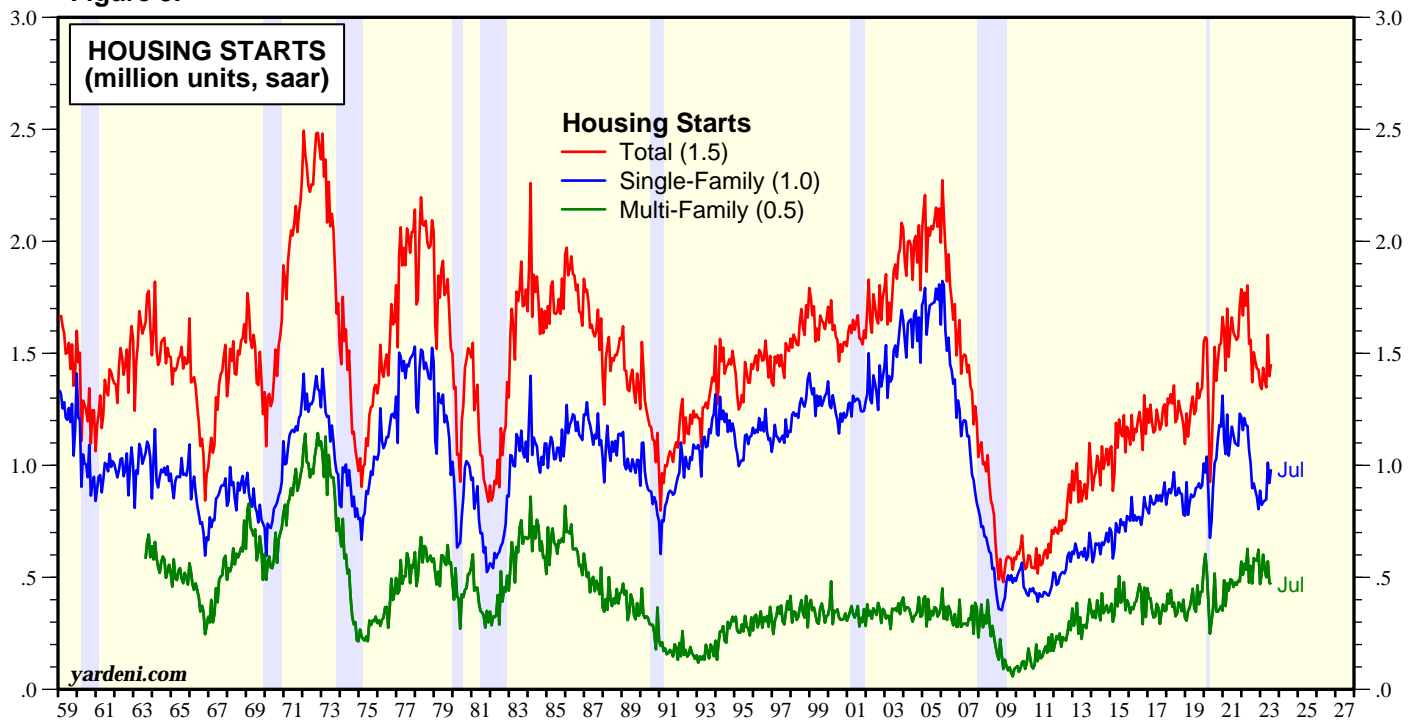
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Bureau of Labor Statistics.

Figure 4.



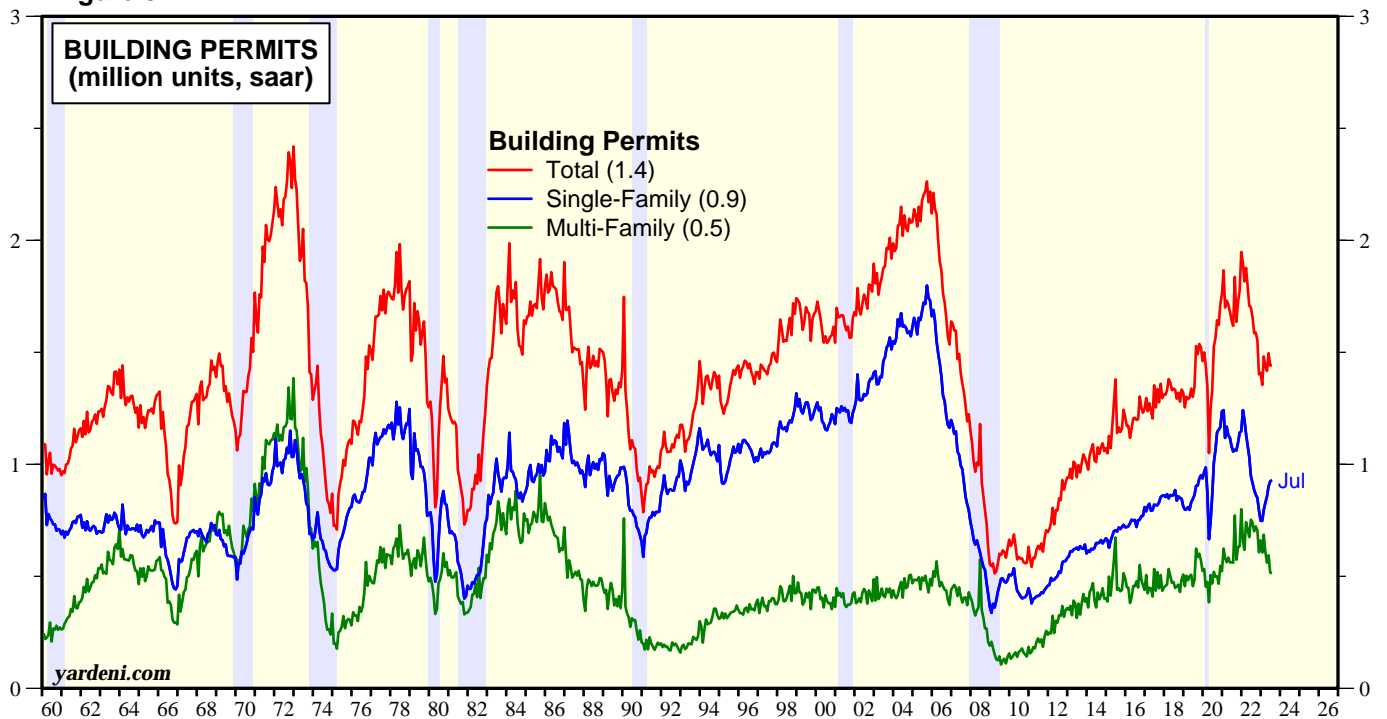
* 2017=100.
 ** 2002=100.
 Source: Bureau of Labor Statistics and Federal Reserve Board.

Figure 5.



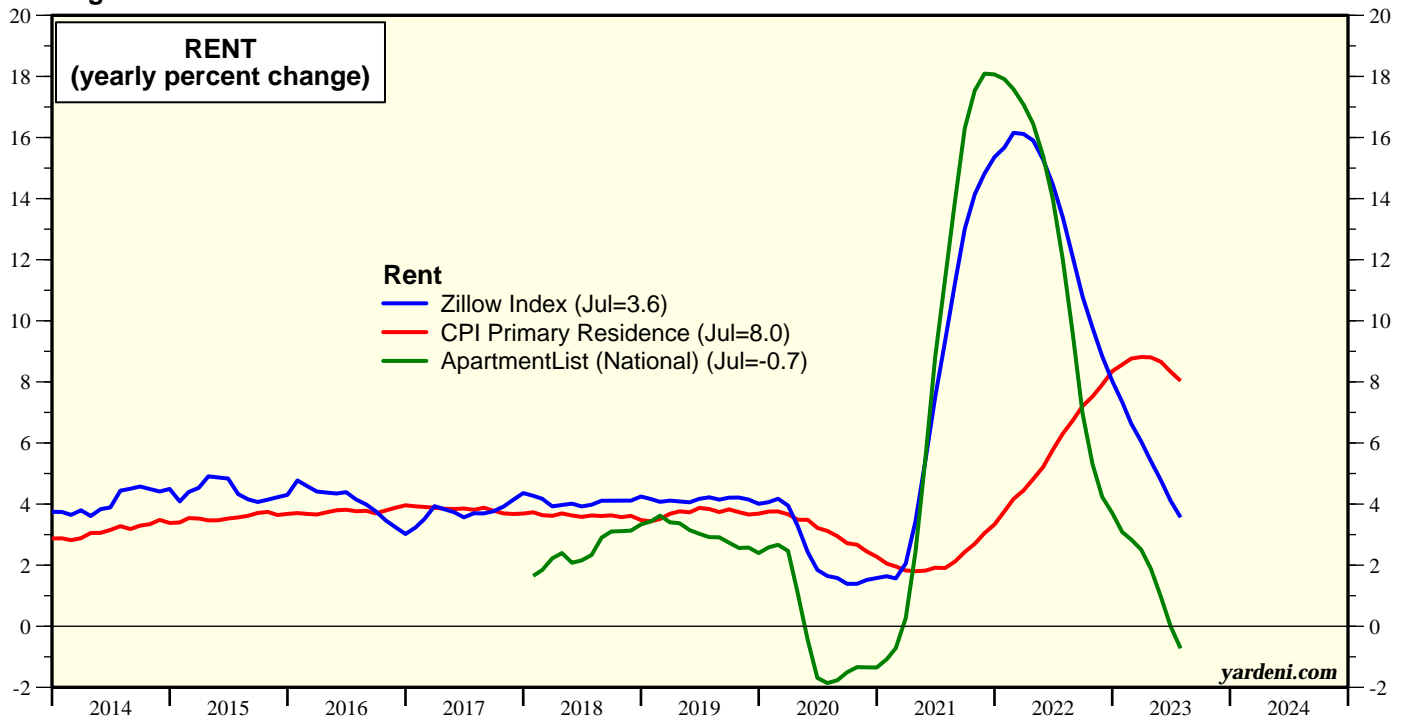
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Census Bureau.

Figure 6.



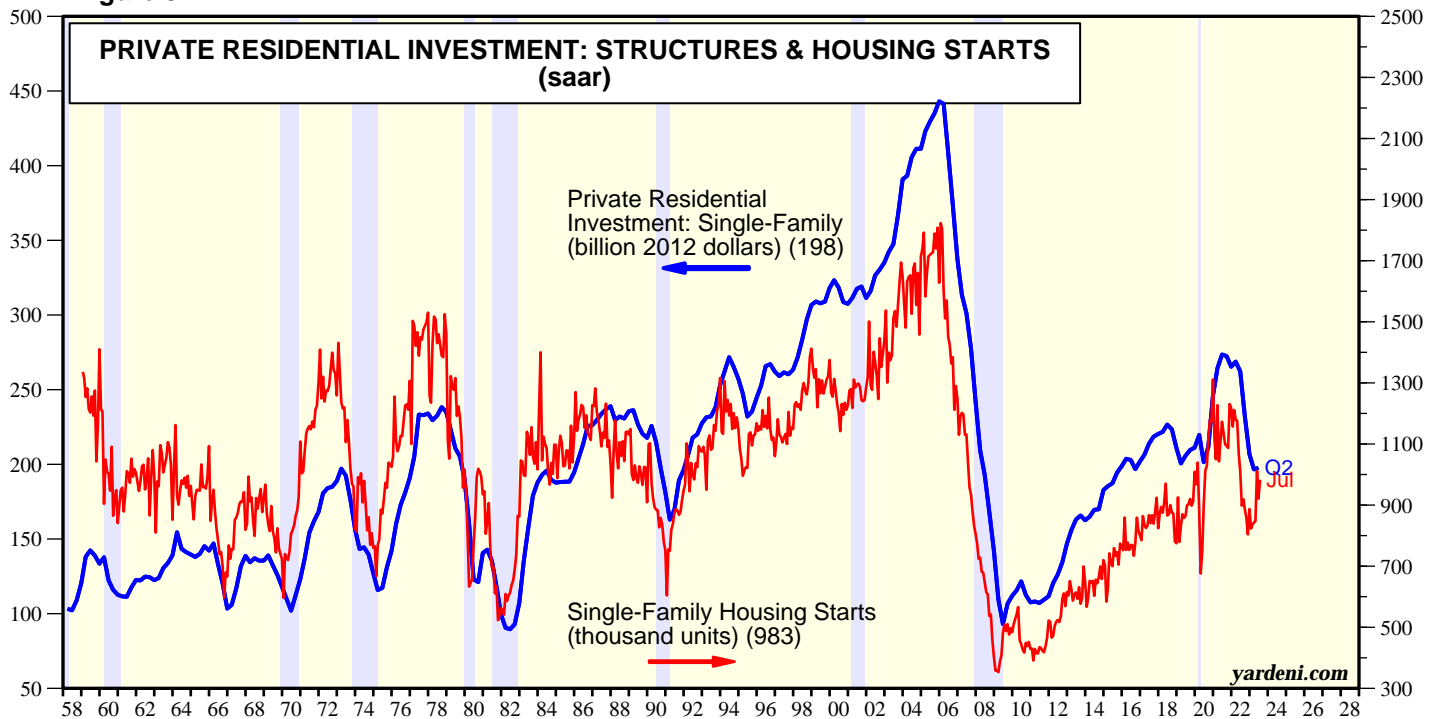
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Census Bureau.

Figure 7.



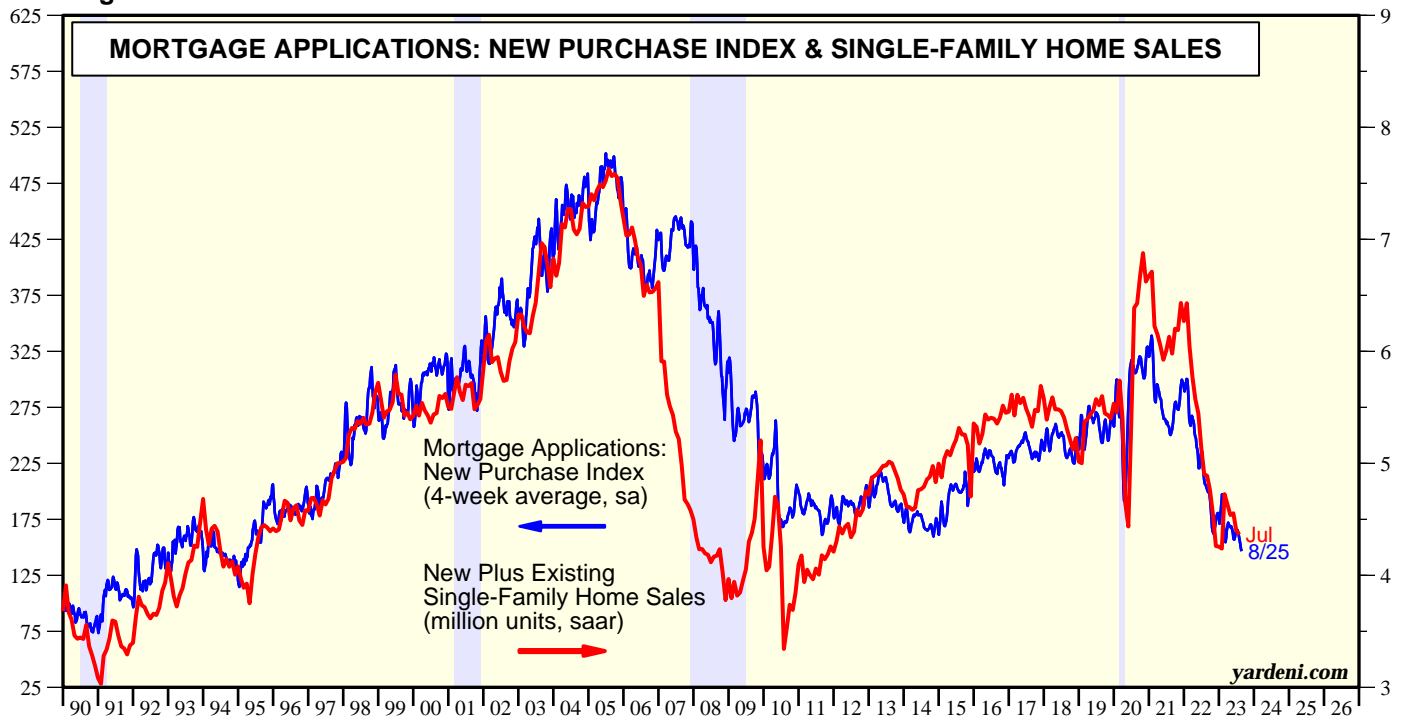
Source: Zillow, ApartmentList, and Bureau of Labor Statistics.

Figure 8.



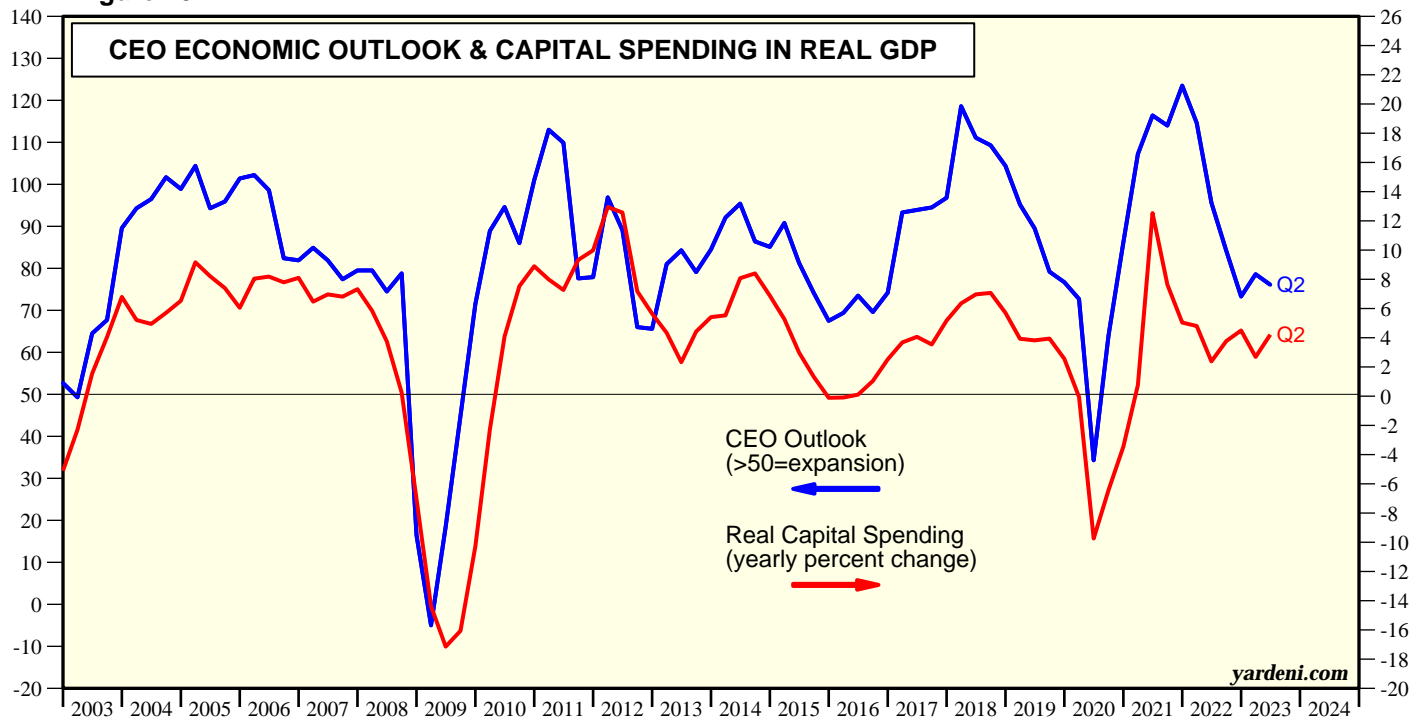
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Bureau of Economic Analysis and Census Bureau.

Figure 9.



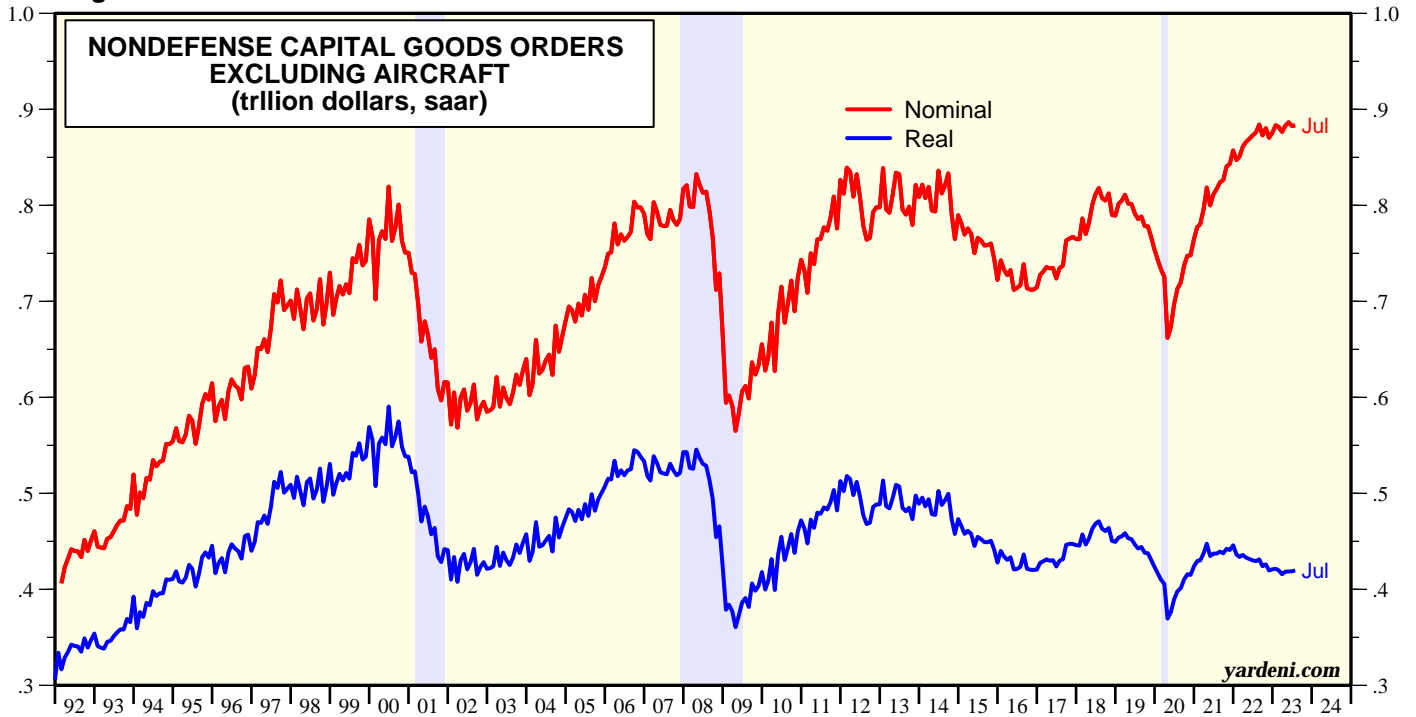
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Mortgage Bankers of America.

Figure 10.



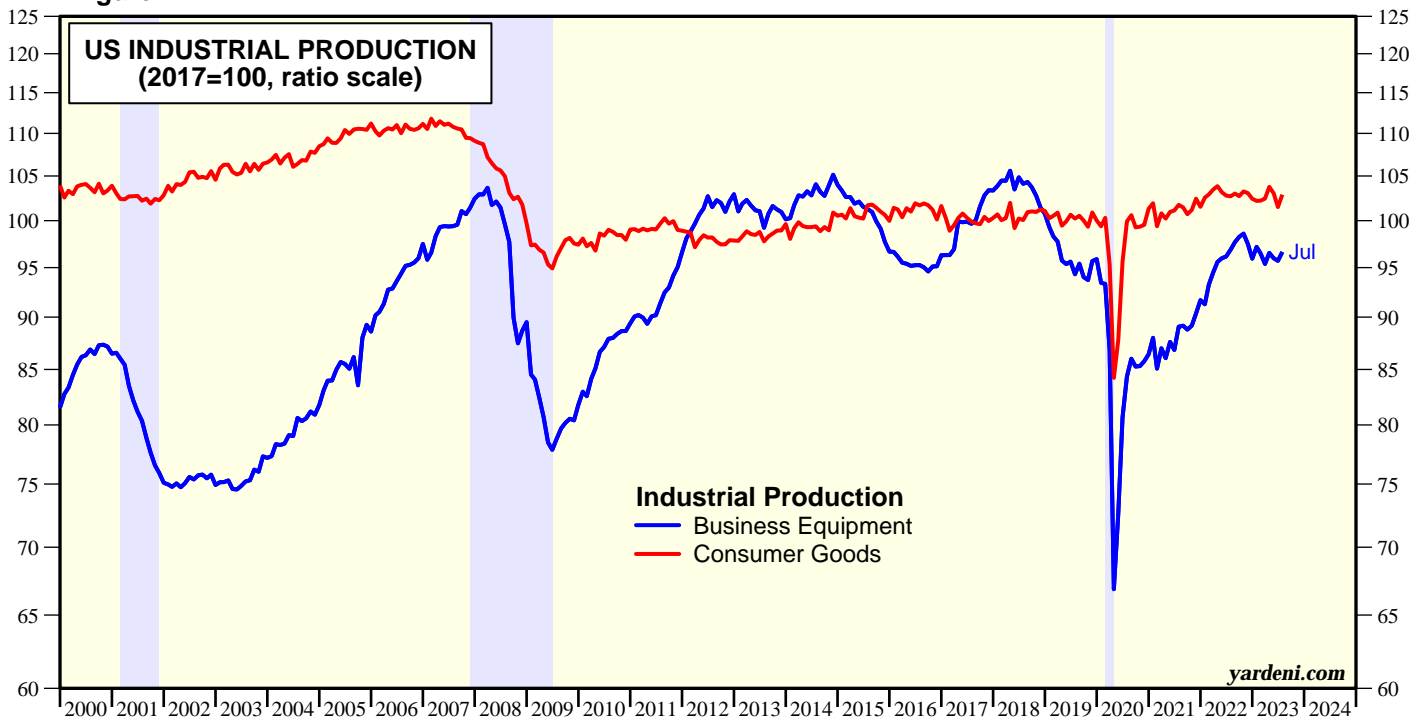
Source: Business Roundtable, Bureau of Economic Analysis, and Haver Analytics.

Figure 11.



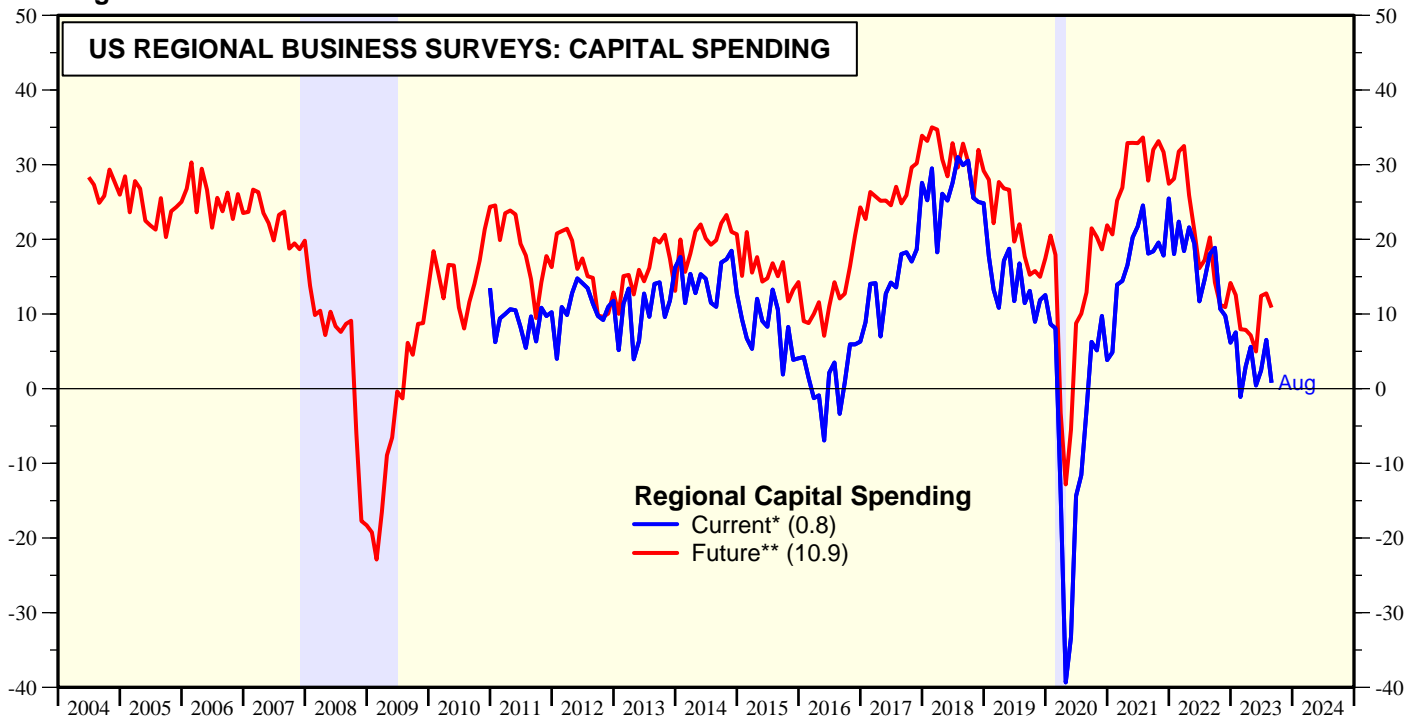
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Census Bureau and Conference Board.

Figure 12.



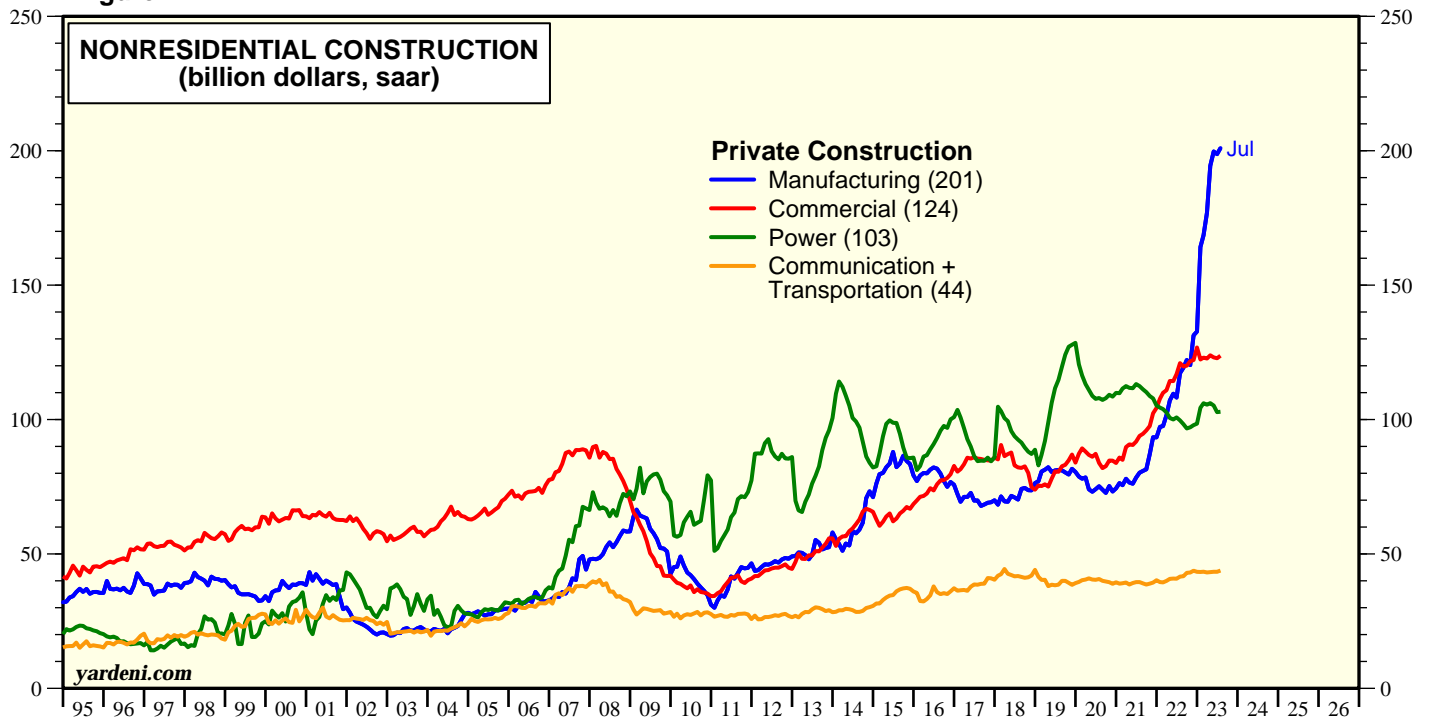
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Federal Reserve Board.

Figure 13.



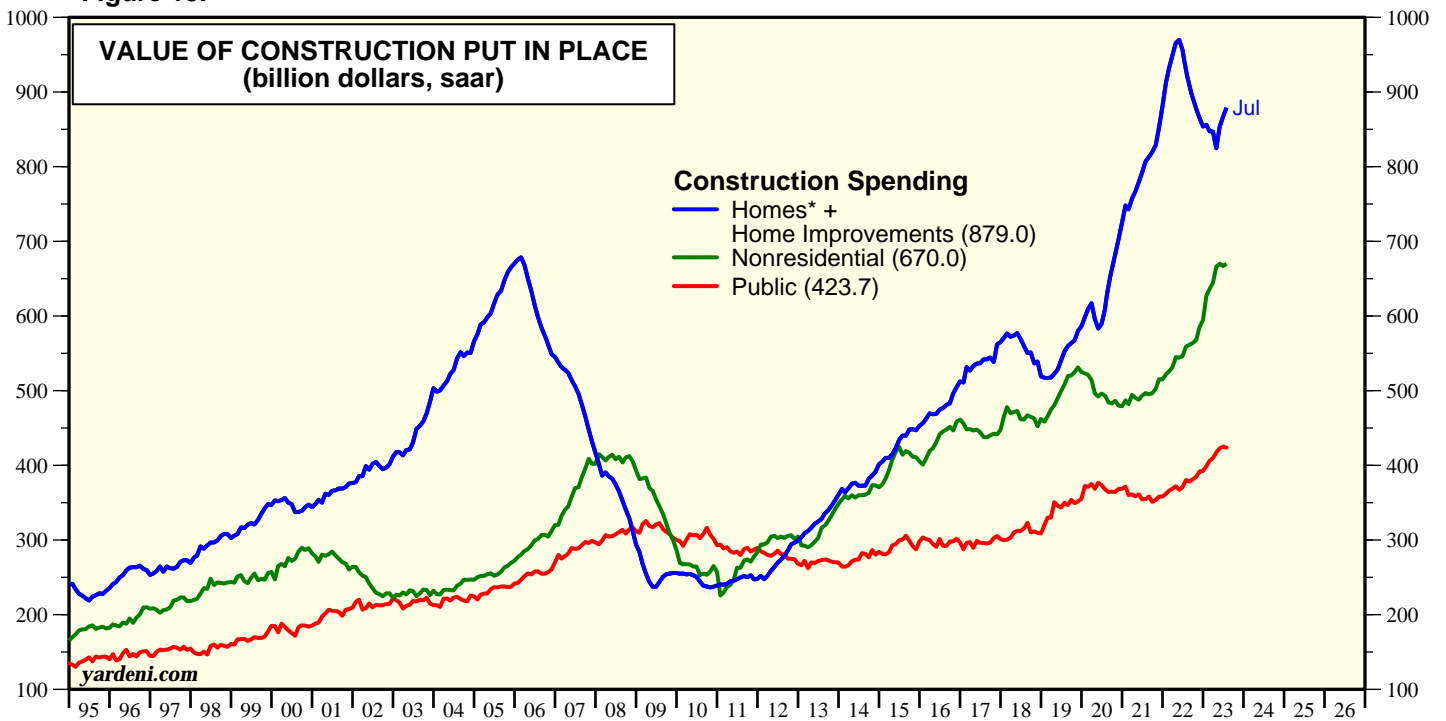
* Average for the following Fed districts: Dallas, Kansas City, and Richmond.
 ** Average for the following Fed districts: Dallas, Kansas City, Richmond, New York, and Philadelphia.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Federal Reserve Banks of Kansas City, New York, Philadelphia, Richmond, and Dallas.

Figure 14.



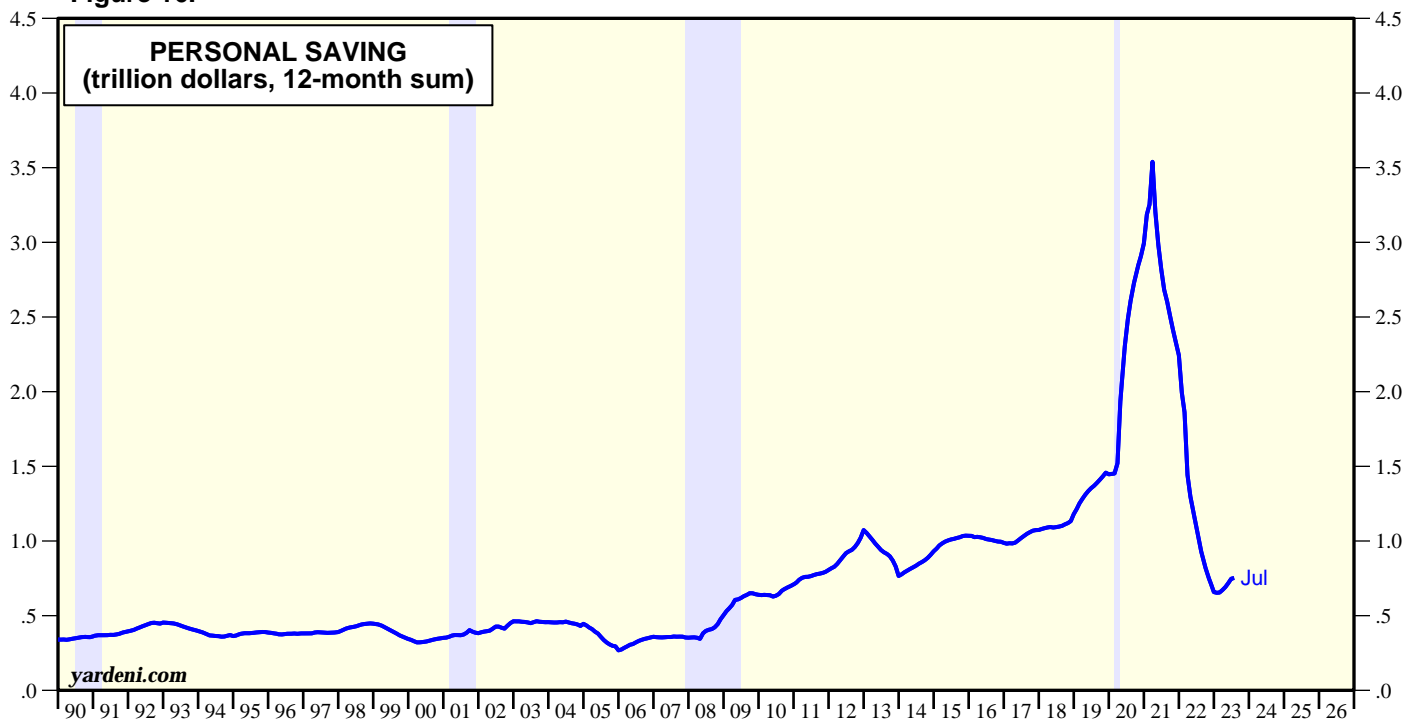
* Includes new single-family homes, new multi-family homes, and home improvements.
 Source: Census Bureau.

Figure 15.



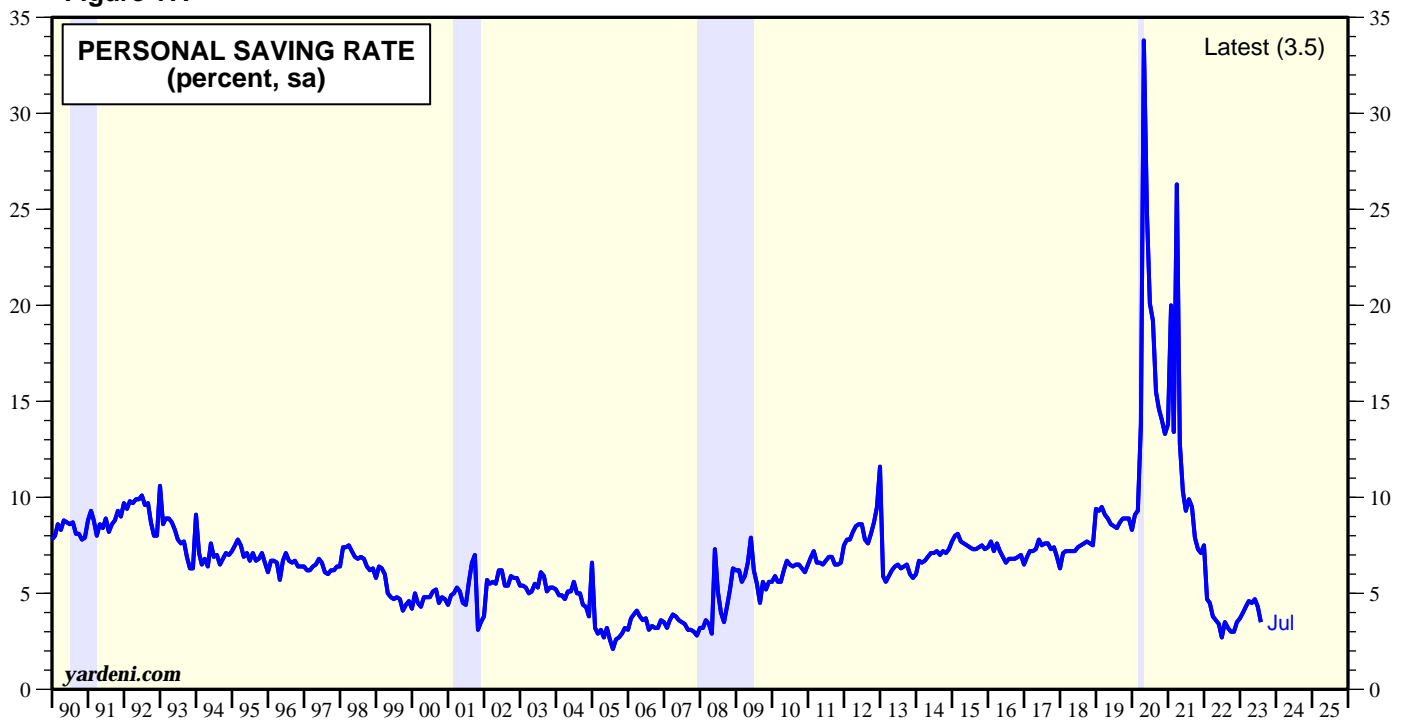
* Includes single-family and multi-family homes.
Source: Census Bureau.

Figure 16.



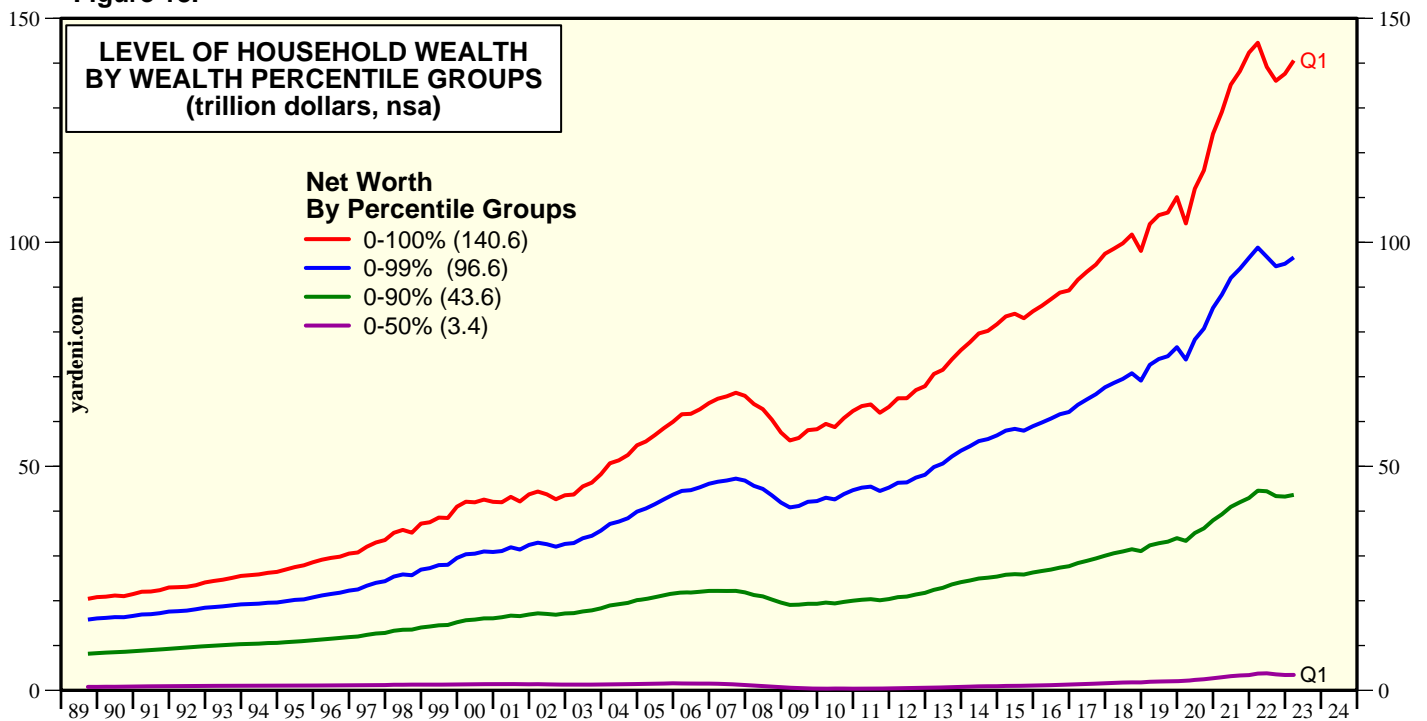
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Bureau of Economic Analysis and Haver Analytics.

Figure 17.



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

Figure 18.



Source: Federal Reserve Board Financial Accounts of the United States, Distributional Financial Accounts (DFA).

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