

Chart Collection for Morning Briefing

Yardeni Research, Inc.

September 25, 2023

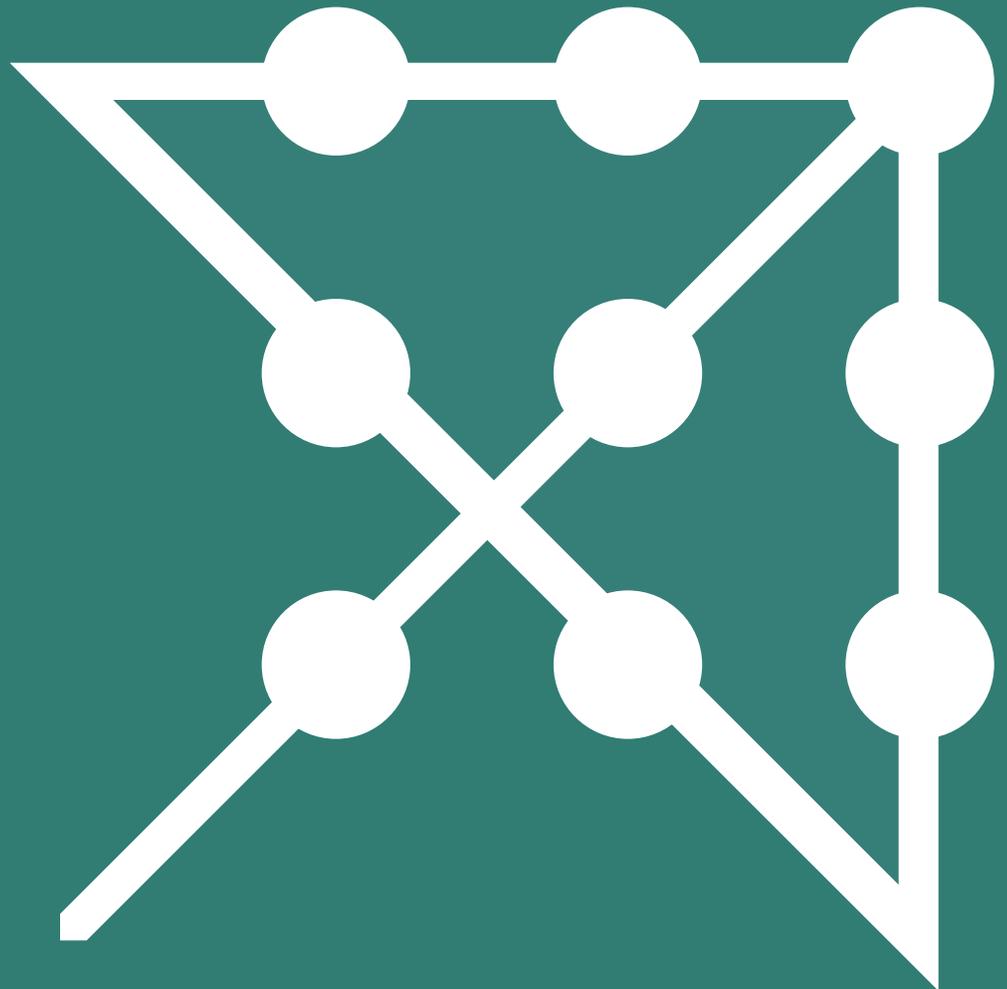
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Mali Quintana

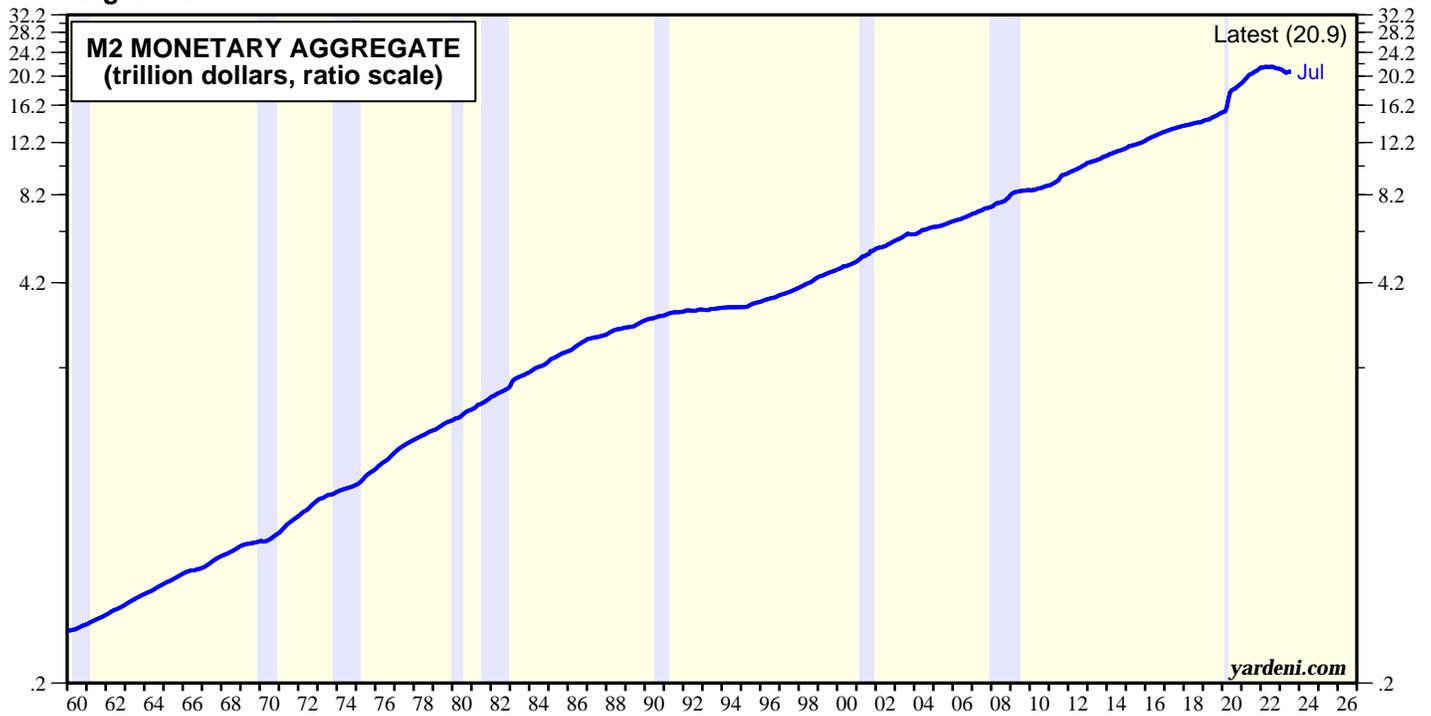
480-664-1333
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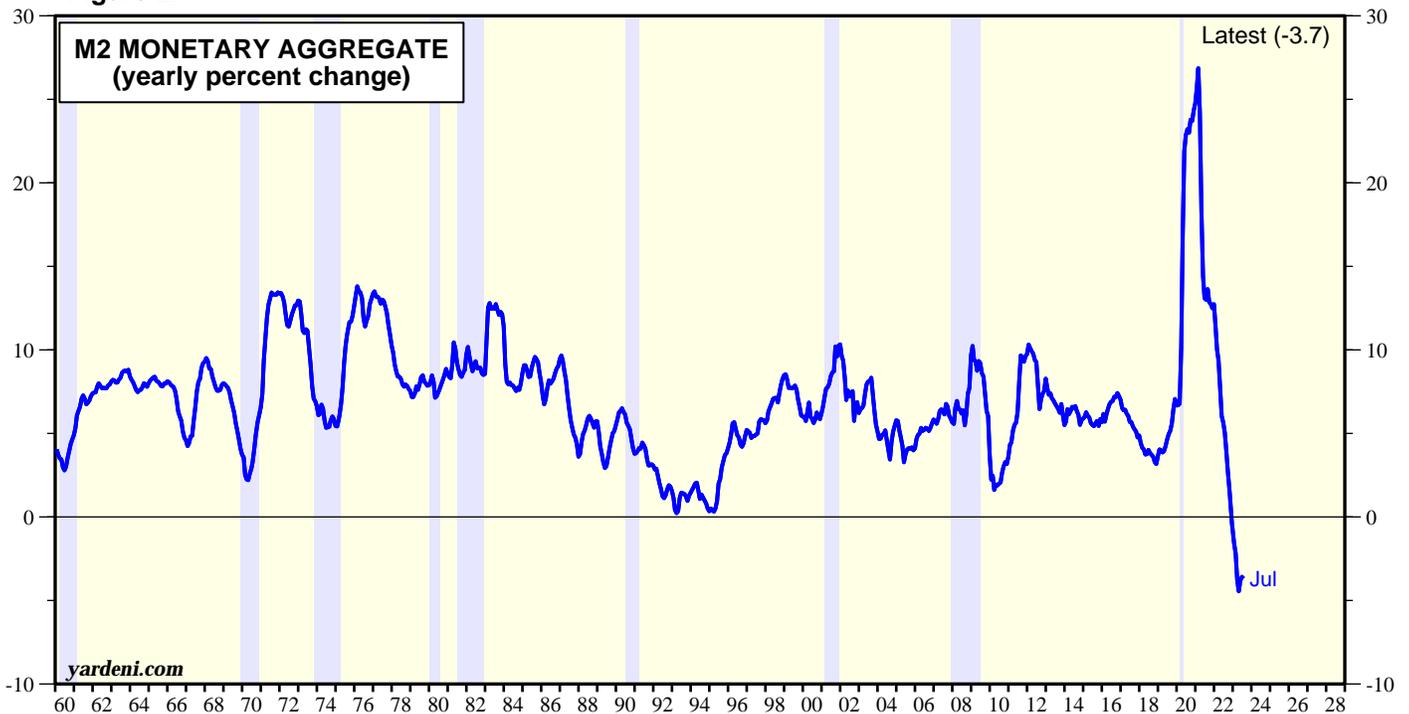
thinking outside the box

Figure 1.



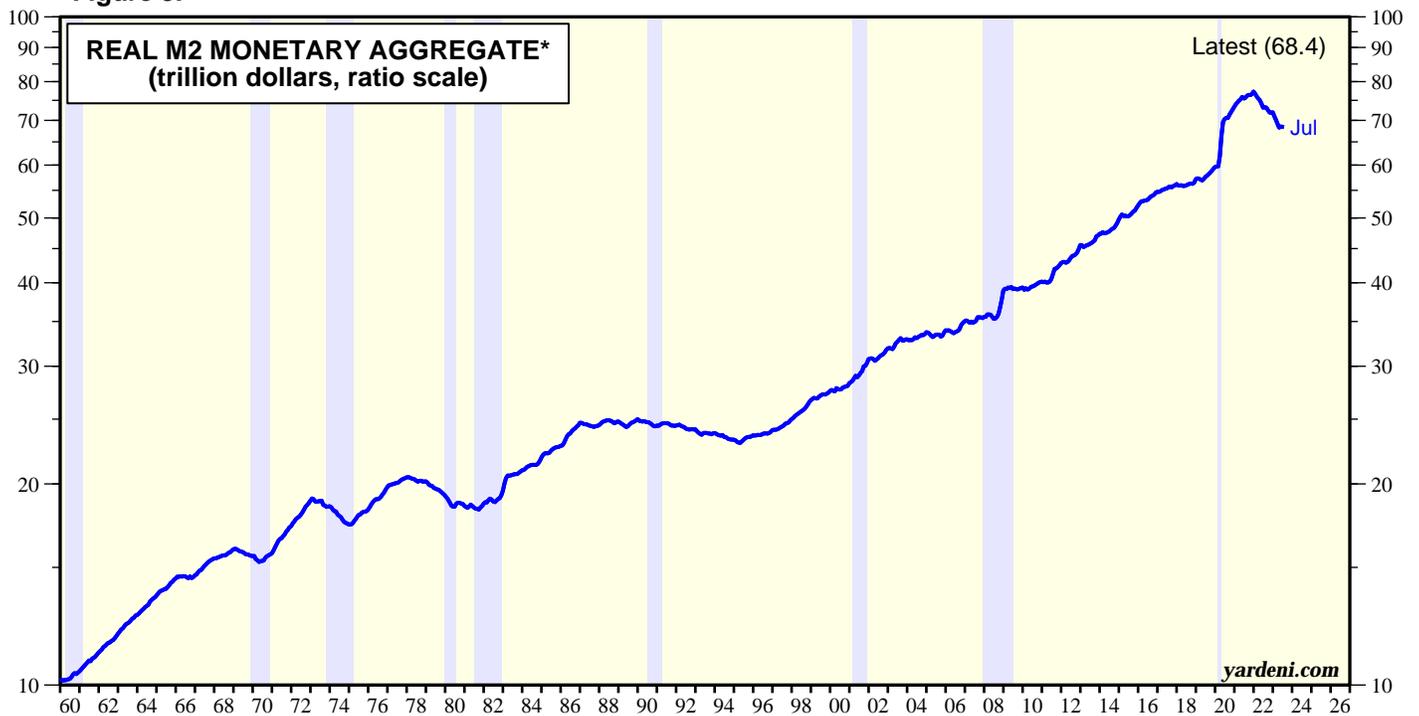
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Board of Governors of the Federal Reserve System.

Figure 2.



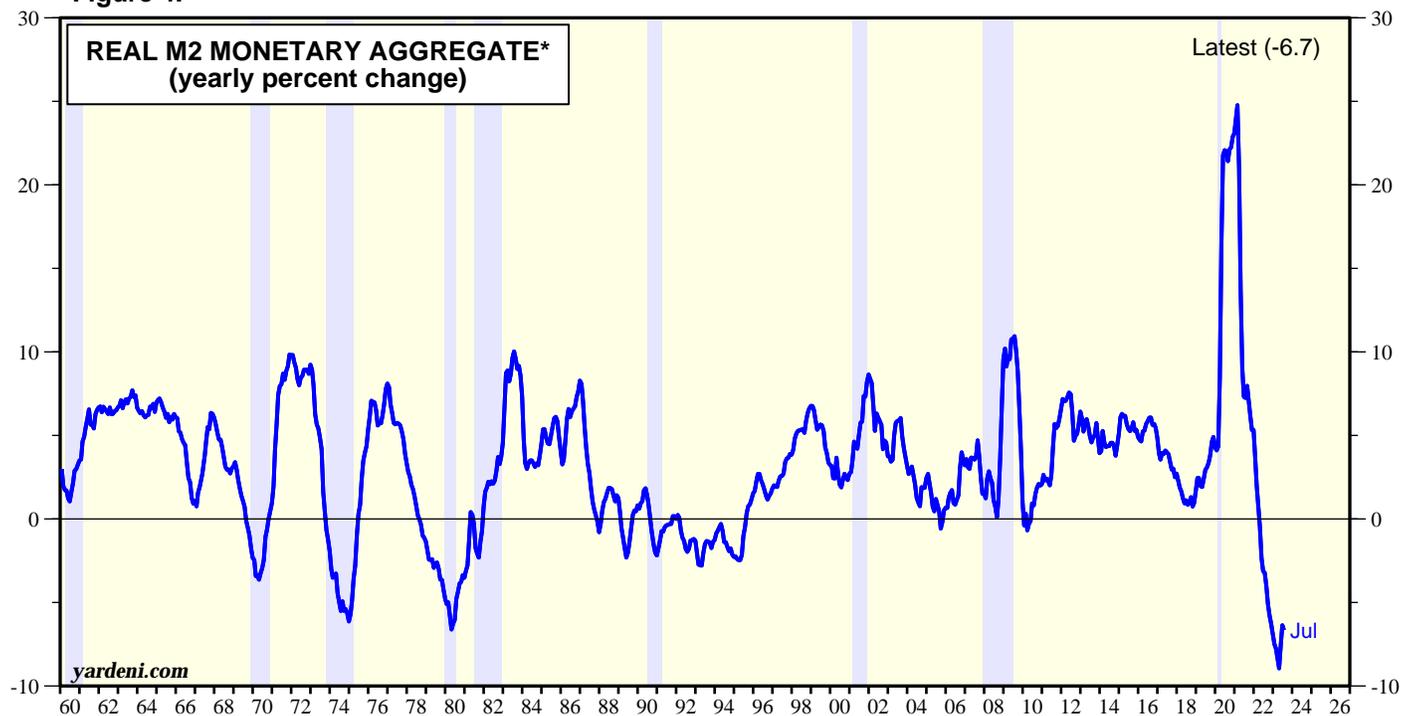
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Federal Reserve Board and Haver Analytics.

Figure 3.



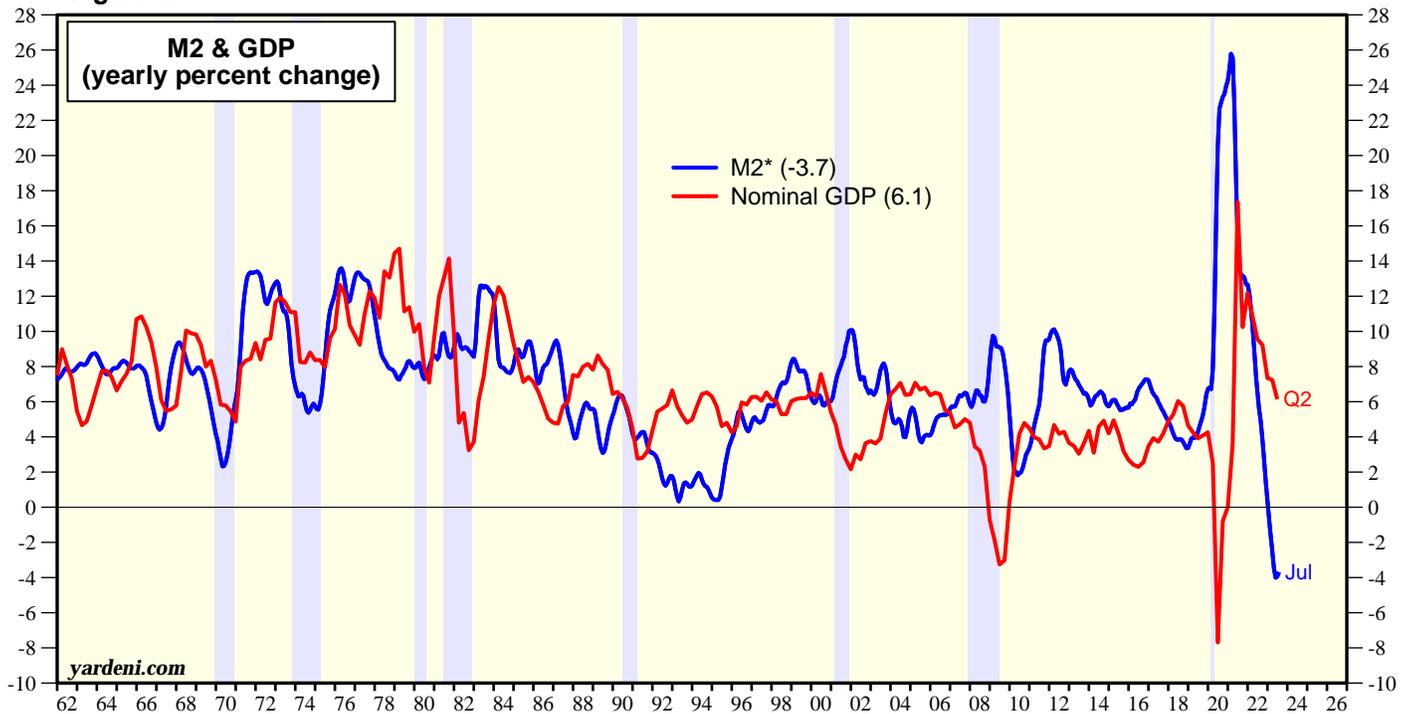
* Deflated by CPI.
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Board of Governors of the Federal Reserve System.

Figure 4.



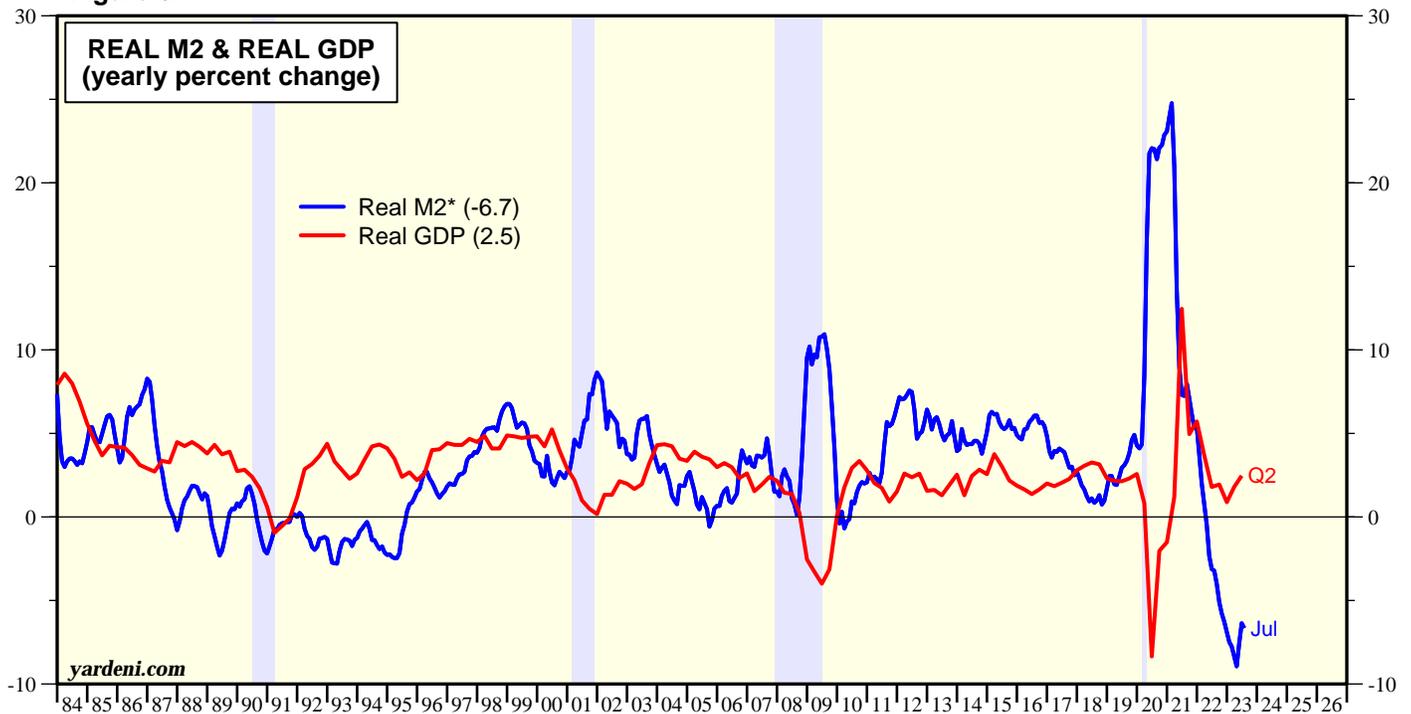
* Deflated by CPI.
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Board of Governors of the Federal Reserve System.

Figure 5.



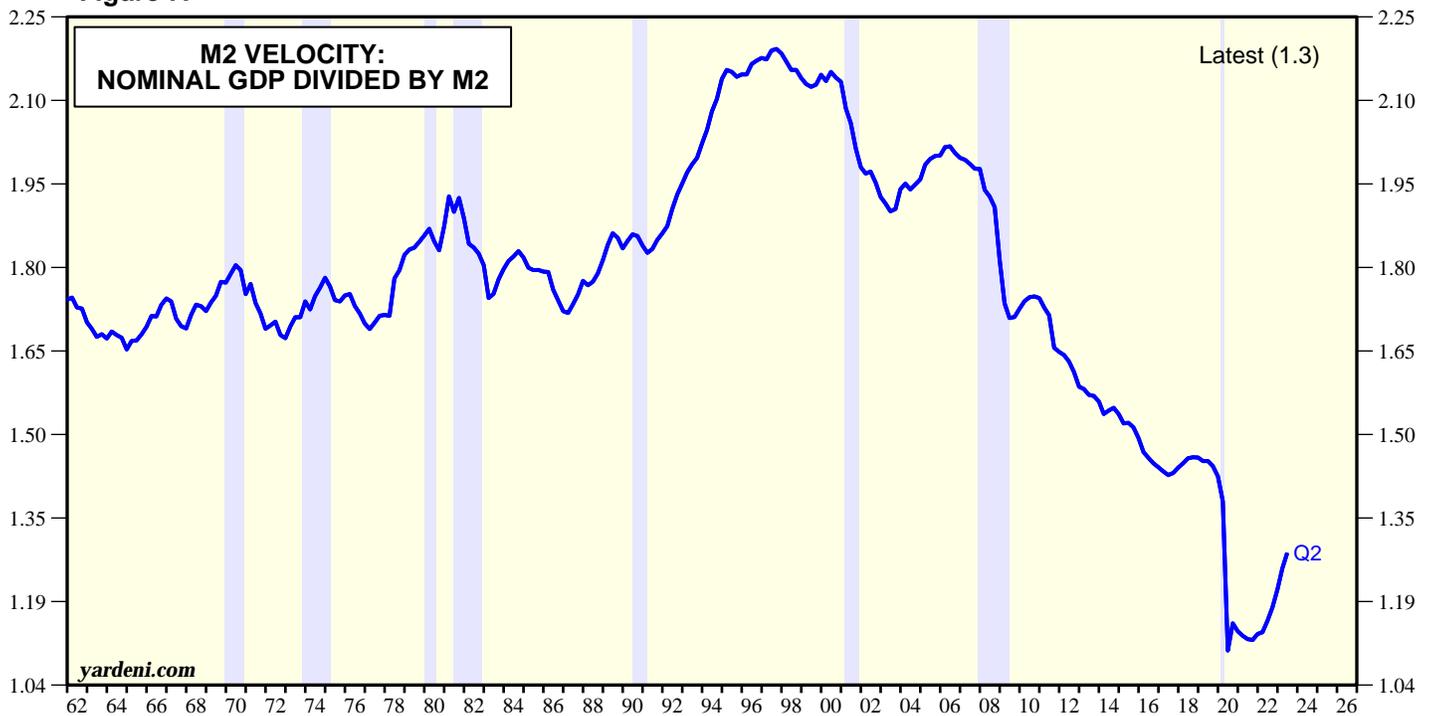
* Using three-month moving average.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Federal Reserve Board.

Figure 6.



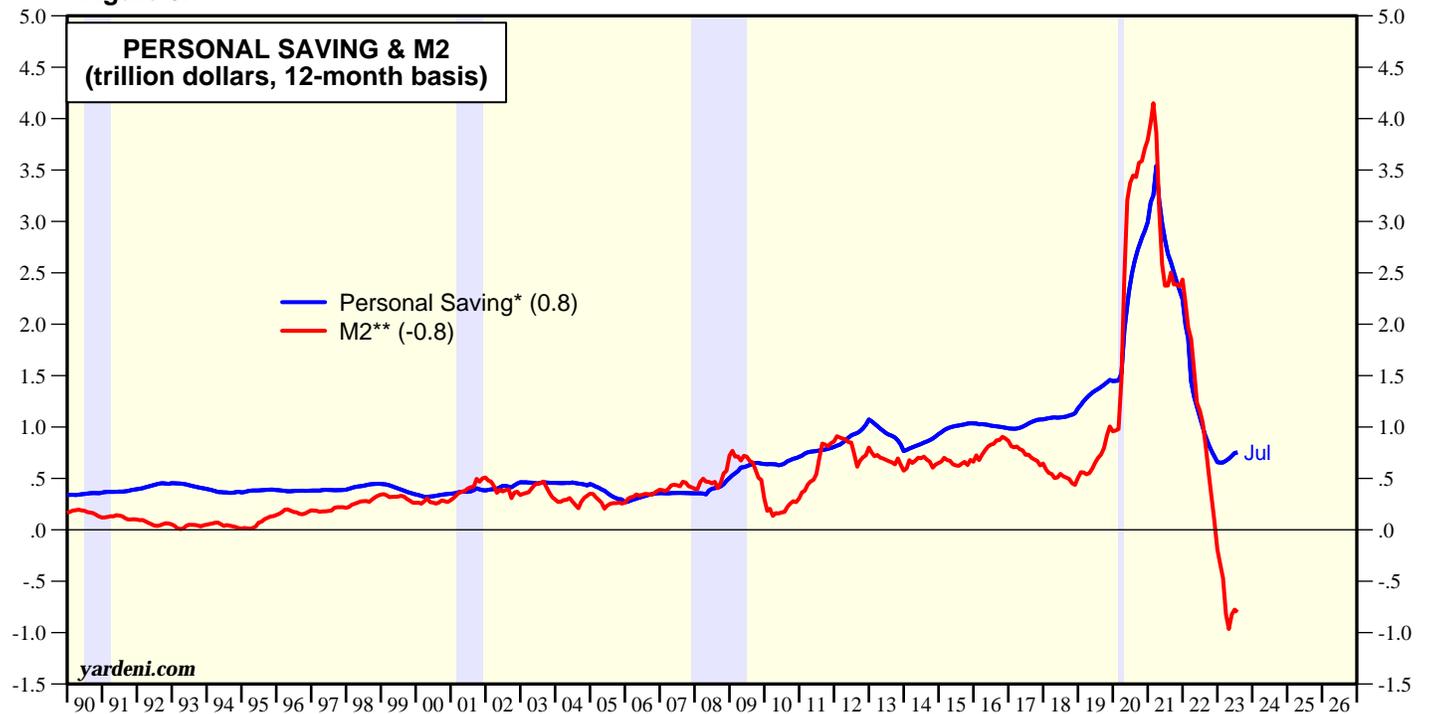
* Deflated by CPI.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Board of Governors of the Federal Reserve System.

Figure 7.



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

Figure 8.

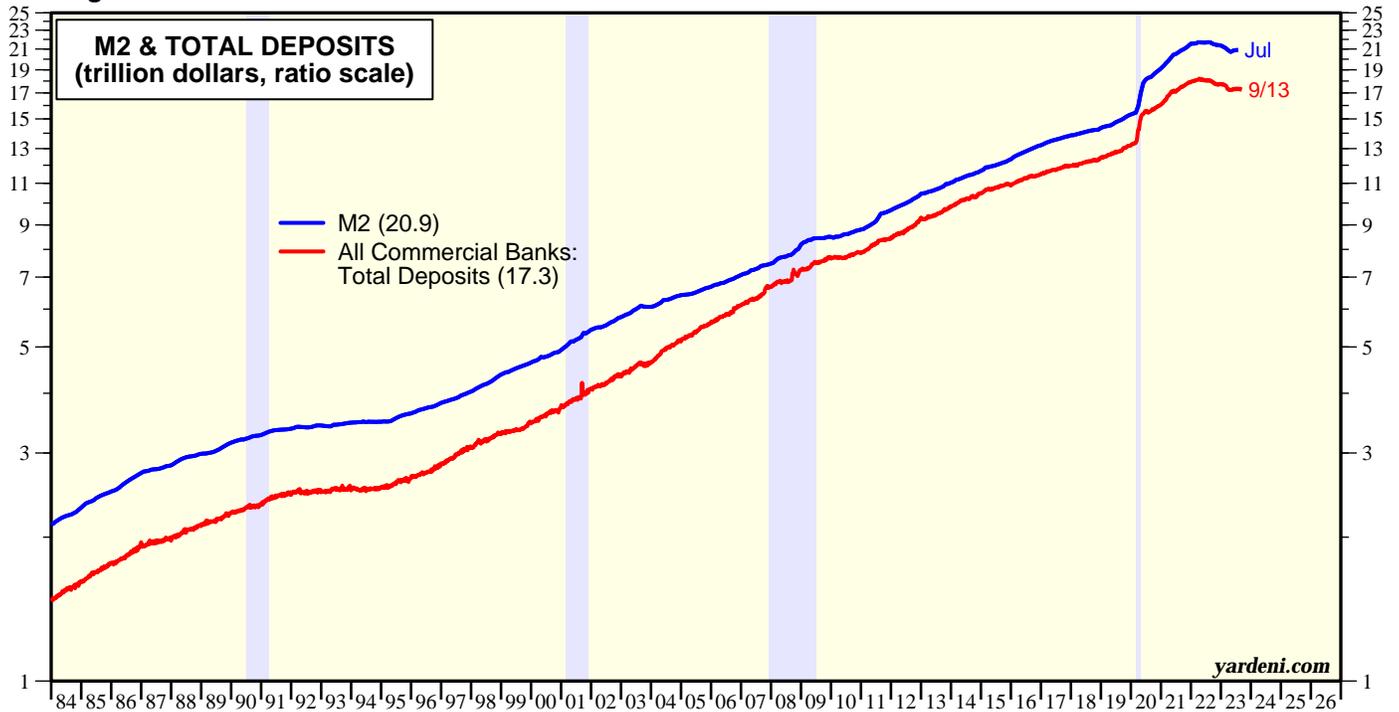


* 12-month sum.

** 12-month change.

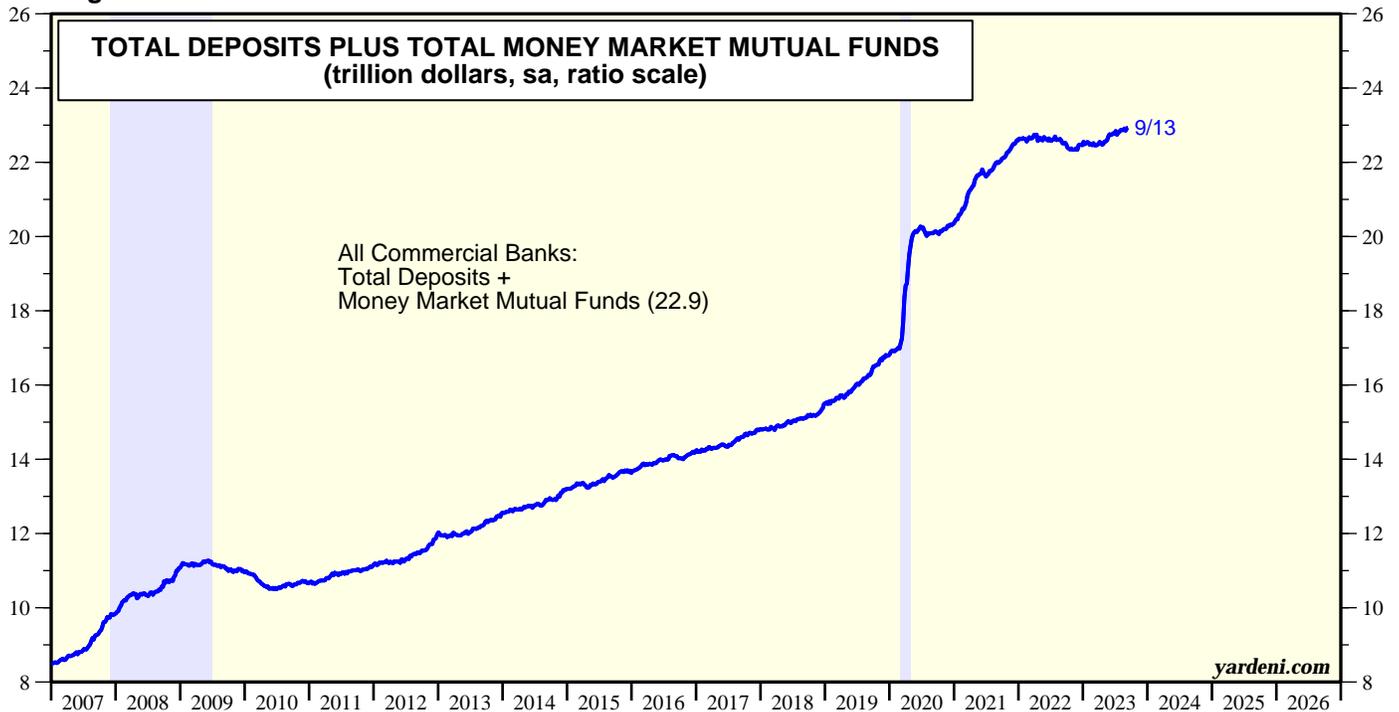
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Bureau of Economic Analysis and Haver Analytics.

Figure 9.



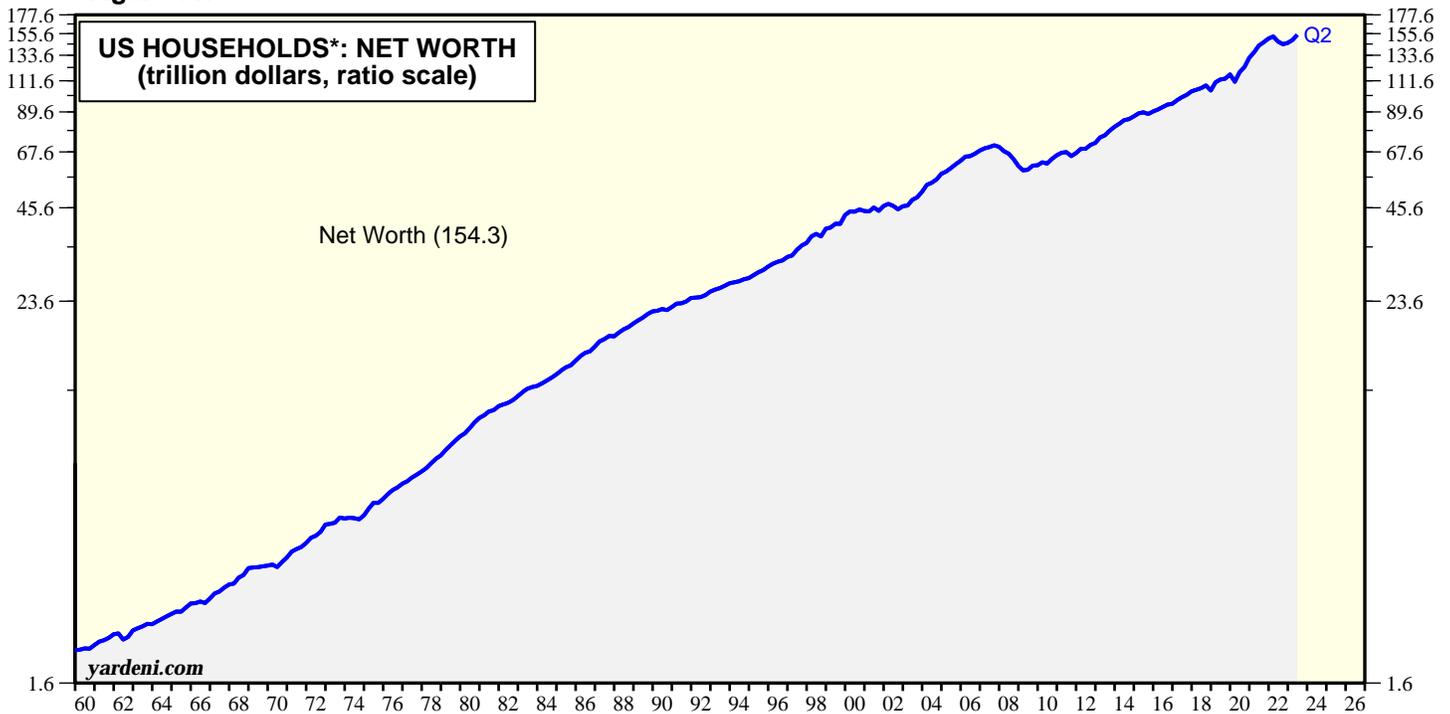
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Board of Governors of the Federal Reserve System.

Figure 10.



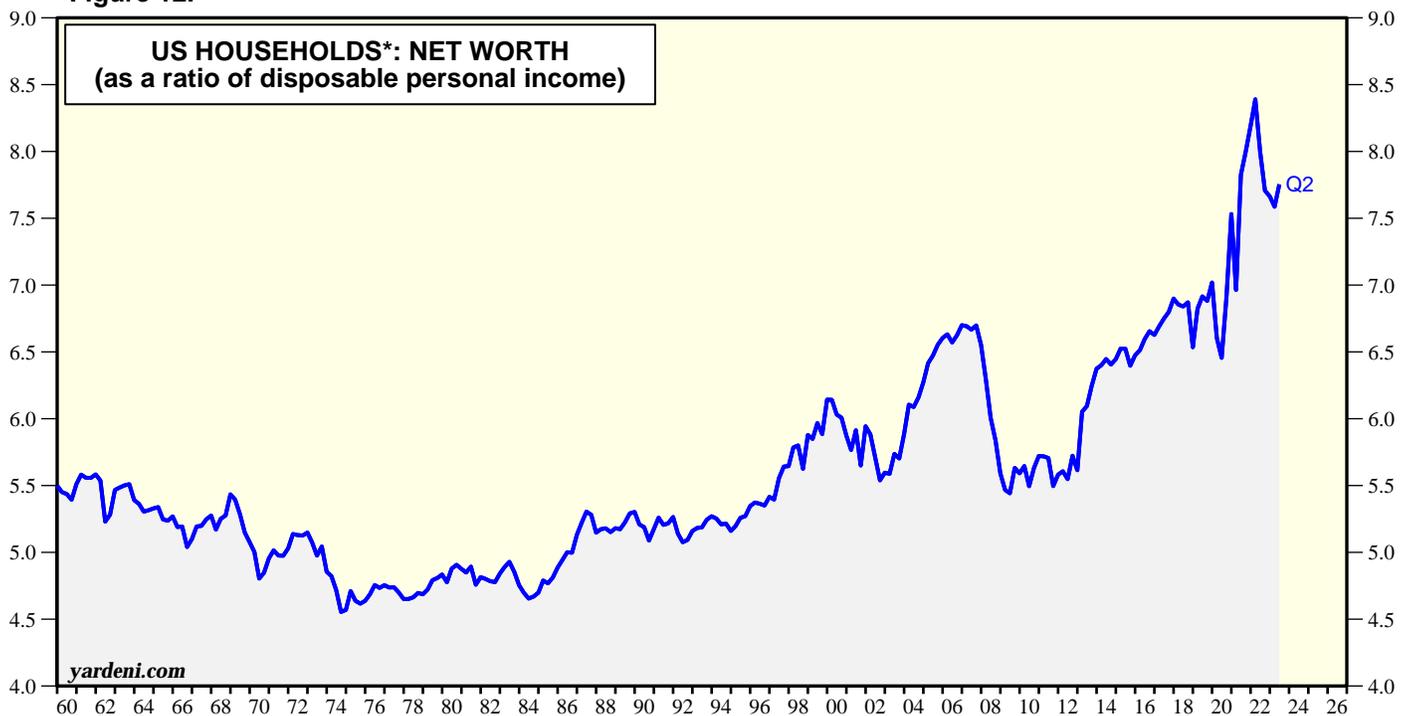
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Board of Governors of the Federal Reserve System.

Figure 11.



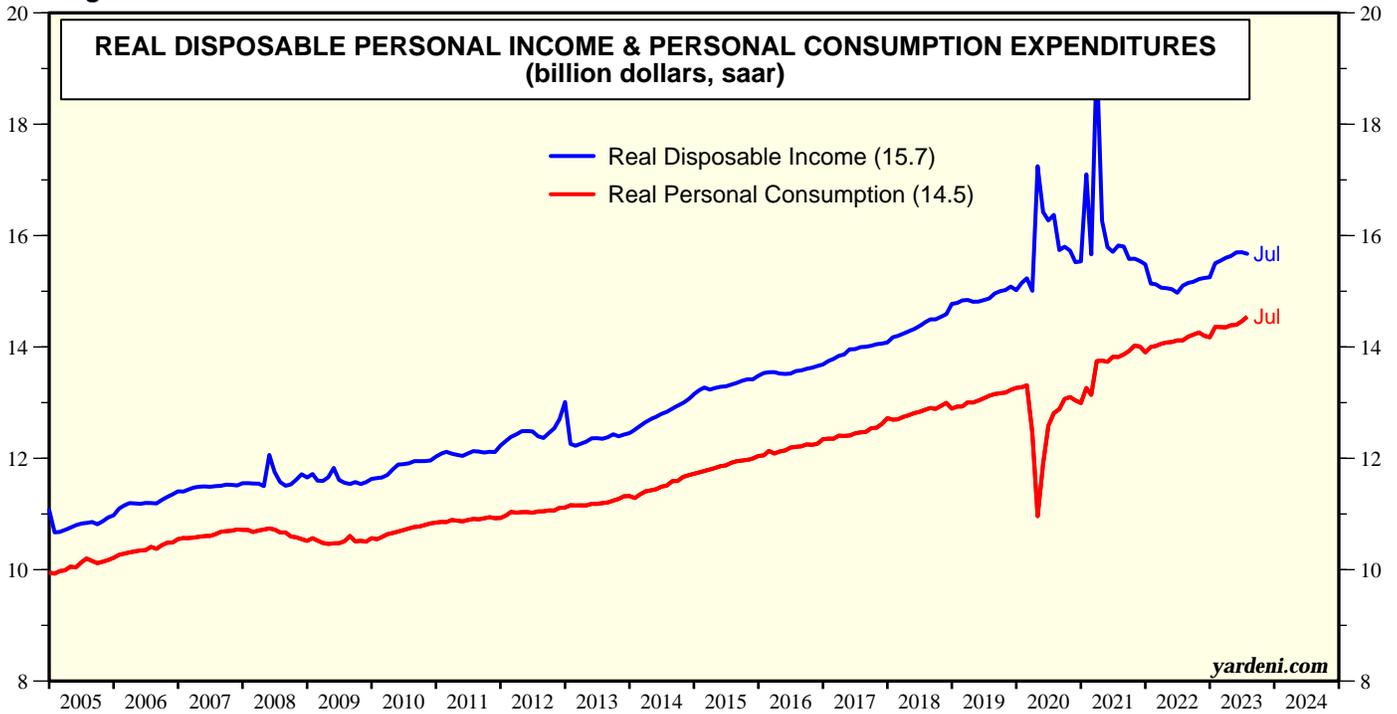
* Sector includes domestic hedge funds, private equity funds, and personal trusts.
Source: Federal Reserve Board Financial Accounts of the United States.

Figure 12.



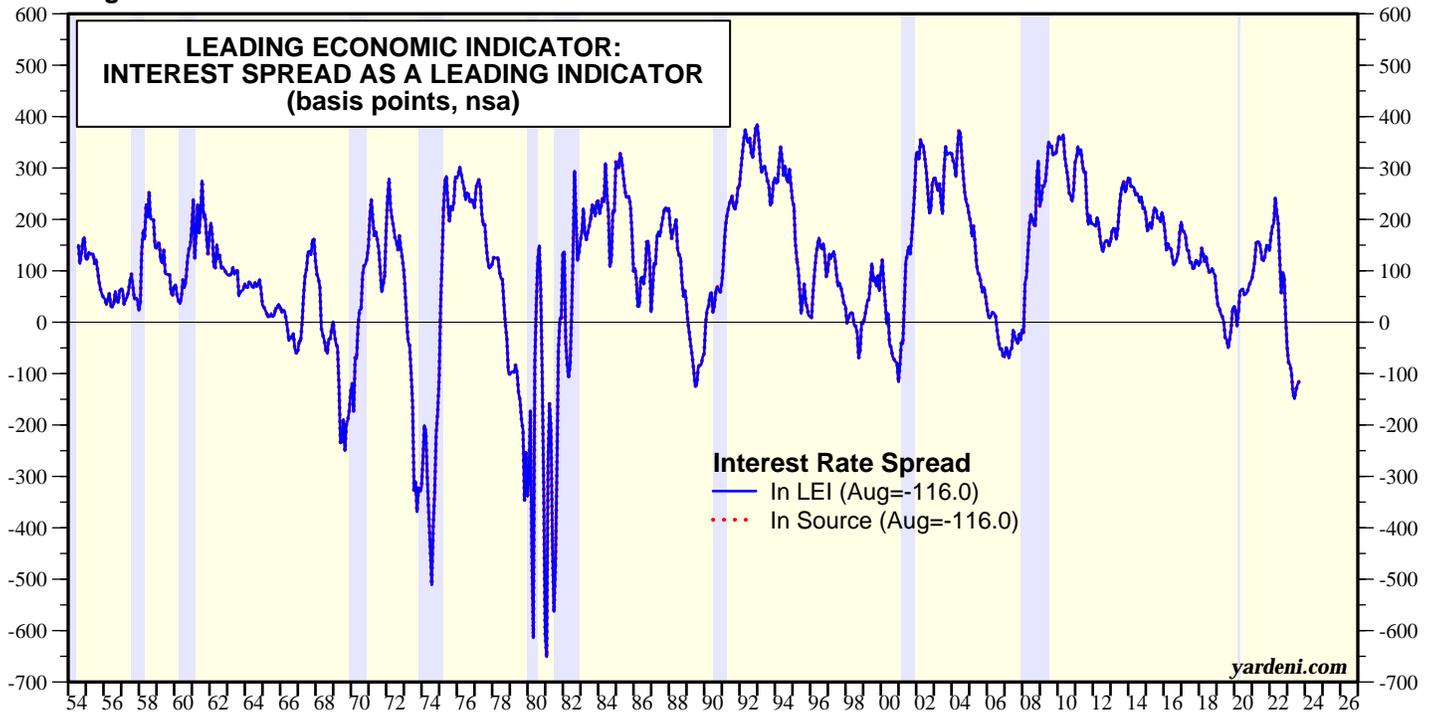
* Sector includes domestic hedge funds, private equity funds, and personal trusts.
Source: Federal Reserve Board Financial Accounts of the United States and Bureau of Economic Analysis.

Figure 13.



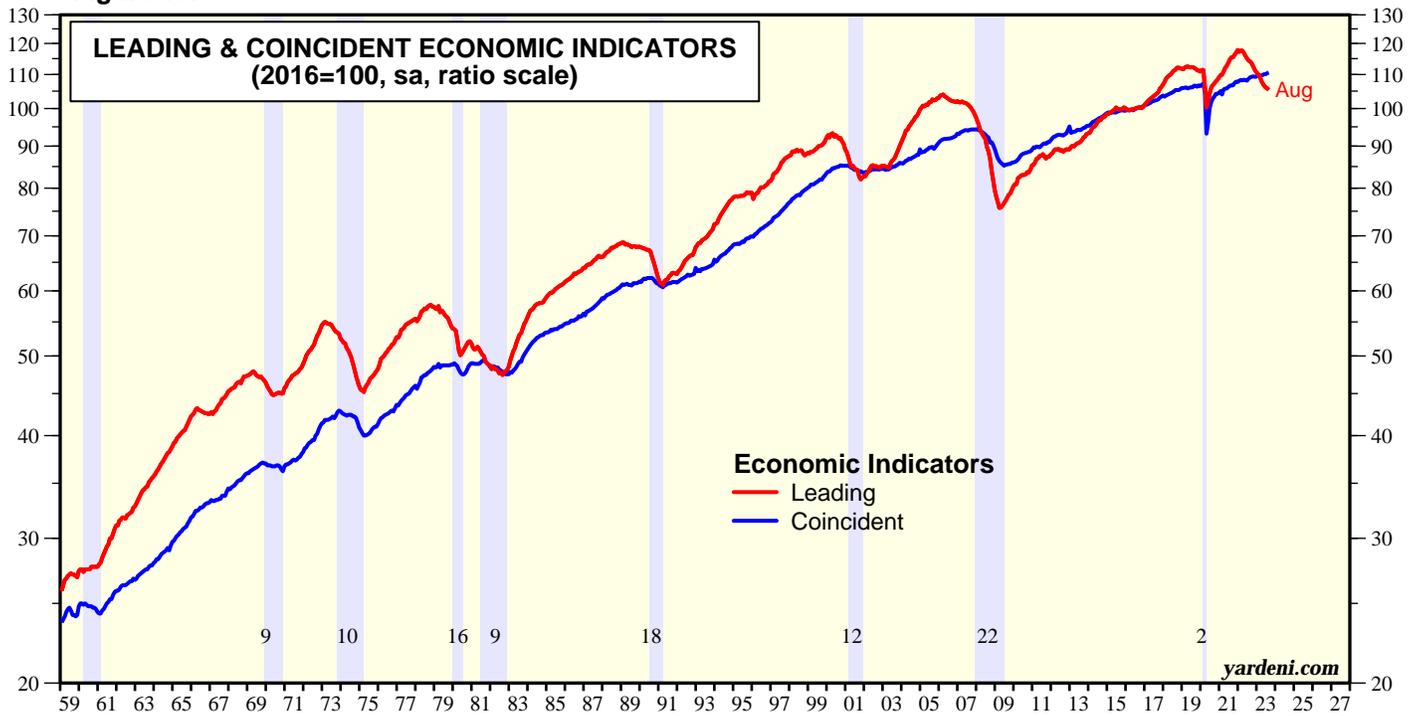
Source: US Department of Commerce, Bureau of Economic Analysis.

Figure 14.



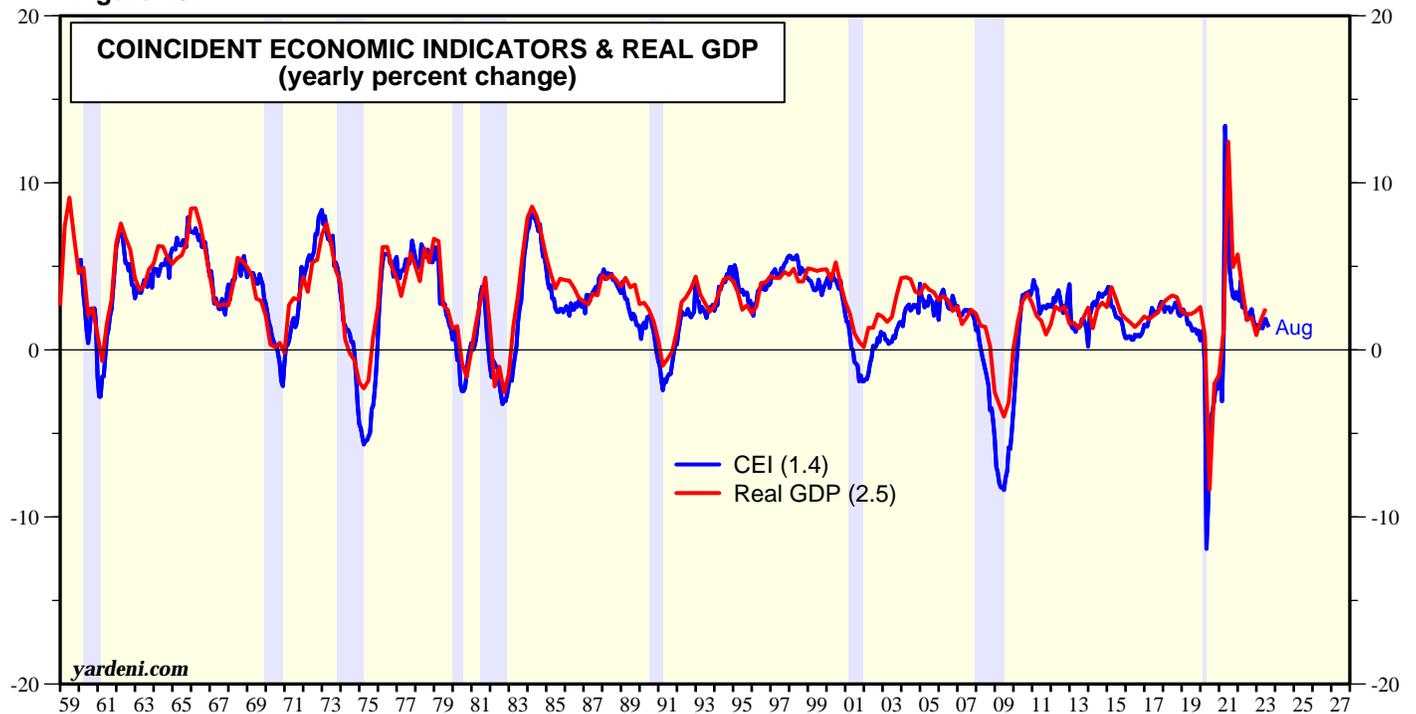
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Conference Board and Federal Reserve Board.

Figure 15.



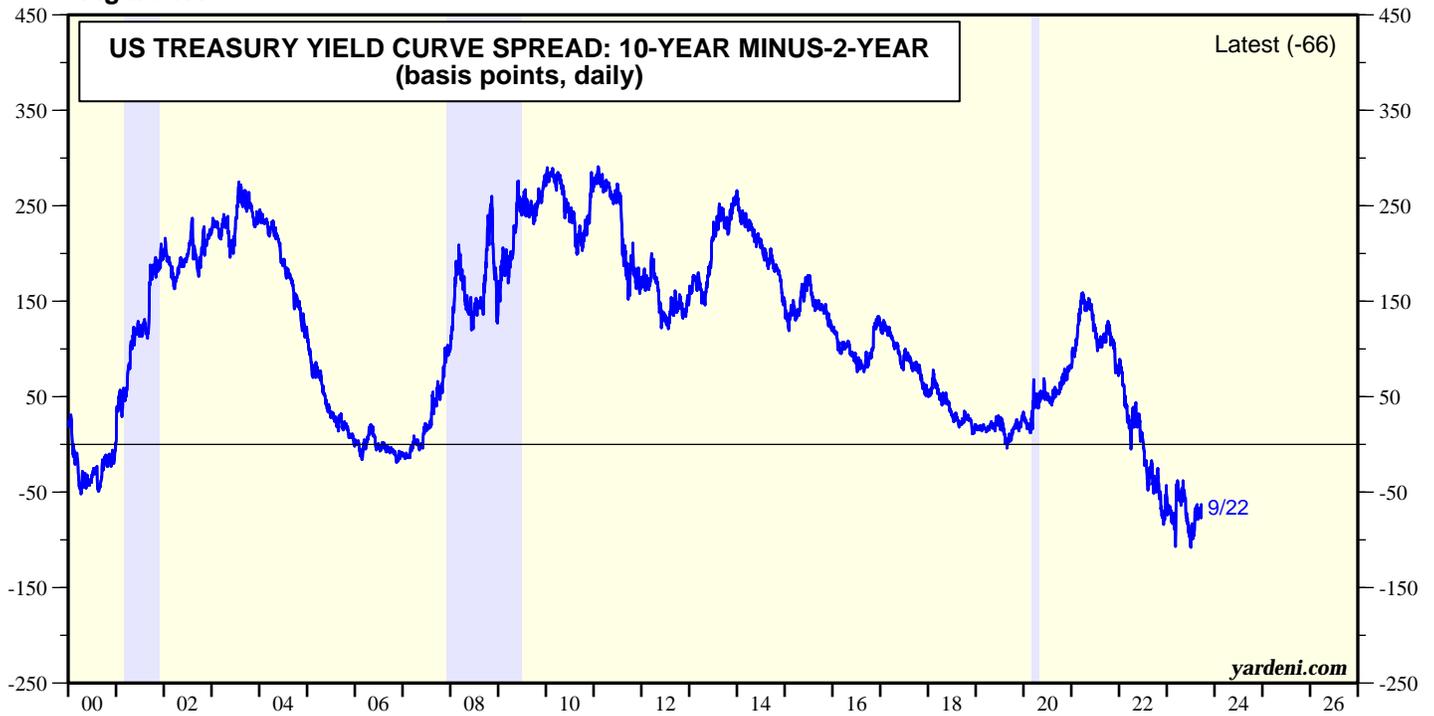
Note: Shaded areas are recessions according to the National Bureau of Economic Research. Numbers above timeline reflect number of months from peak of leading indicators to peak of business cycle.
 Source: The Conference Board.

Figure 16.



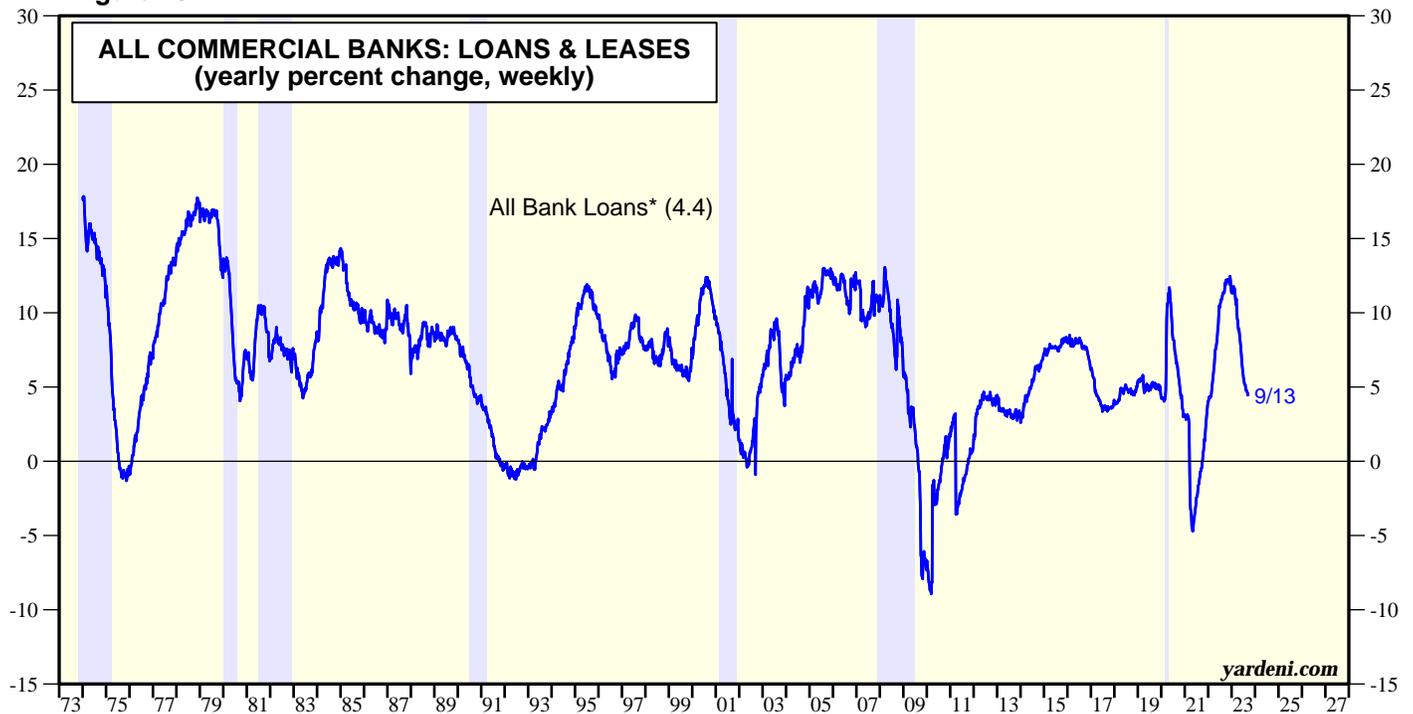
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Bureau of Economic Analysis and Conference Board.

Figure 17.



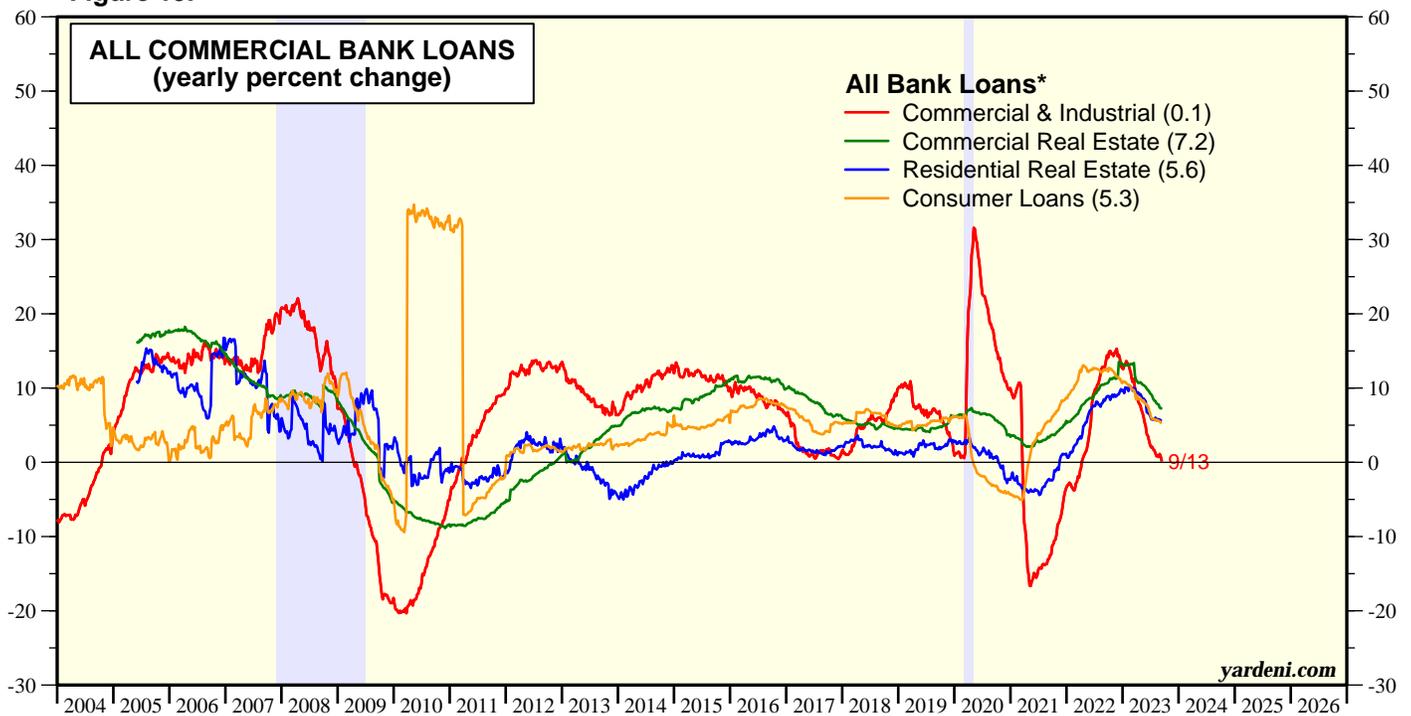
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Federal Reserve Board.

Figure 18.



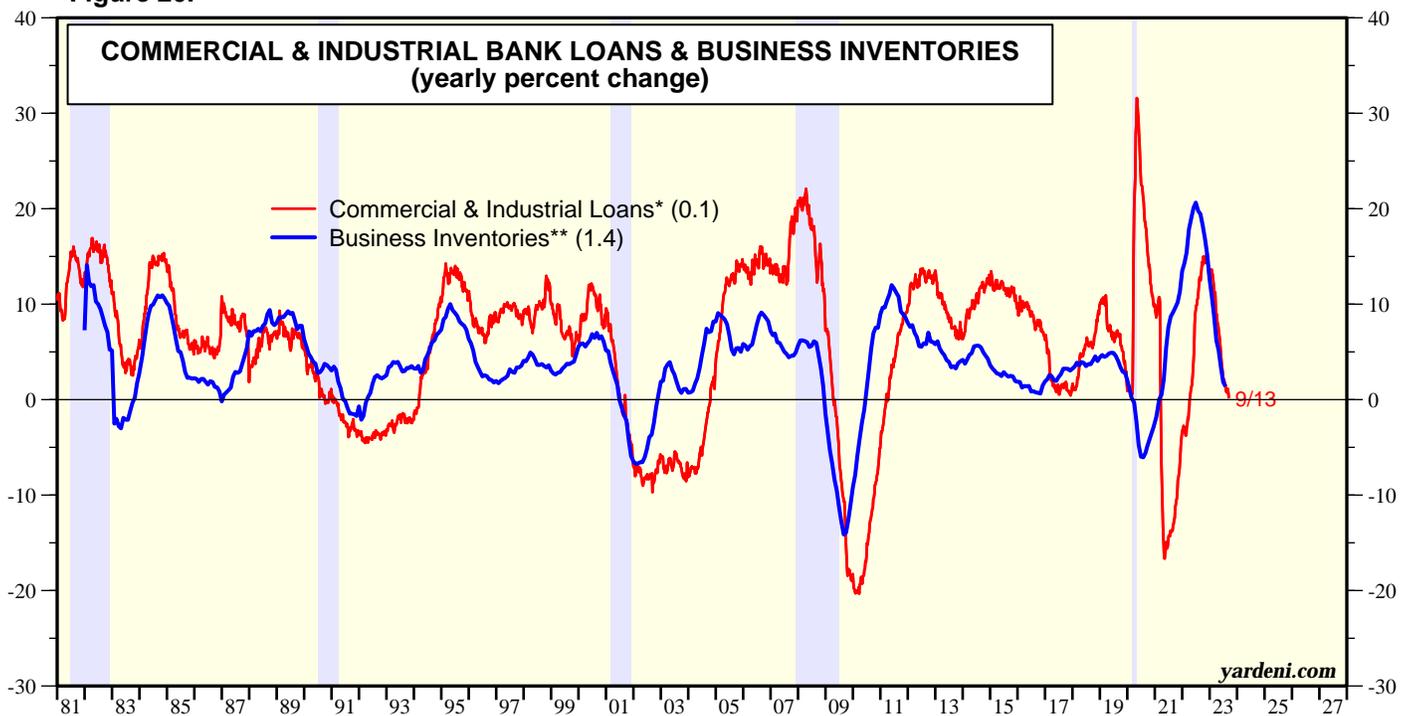
* Includes domestically chartered commercial banks and foreign-related ones.
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Federal Reserve Board.

Figure 19.



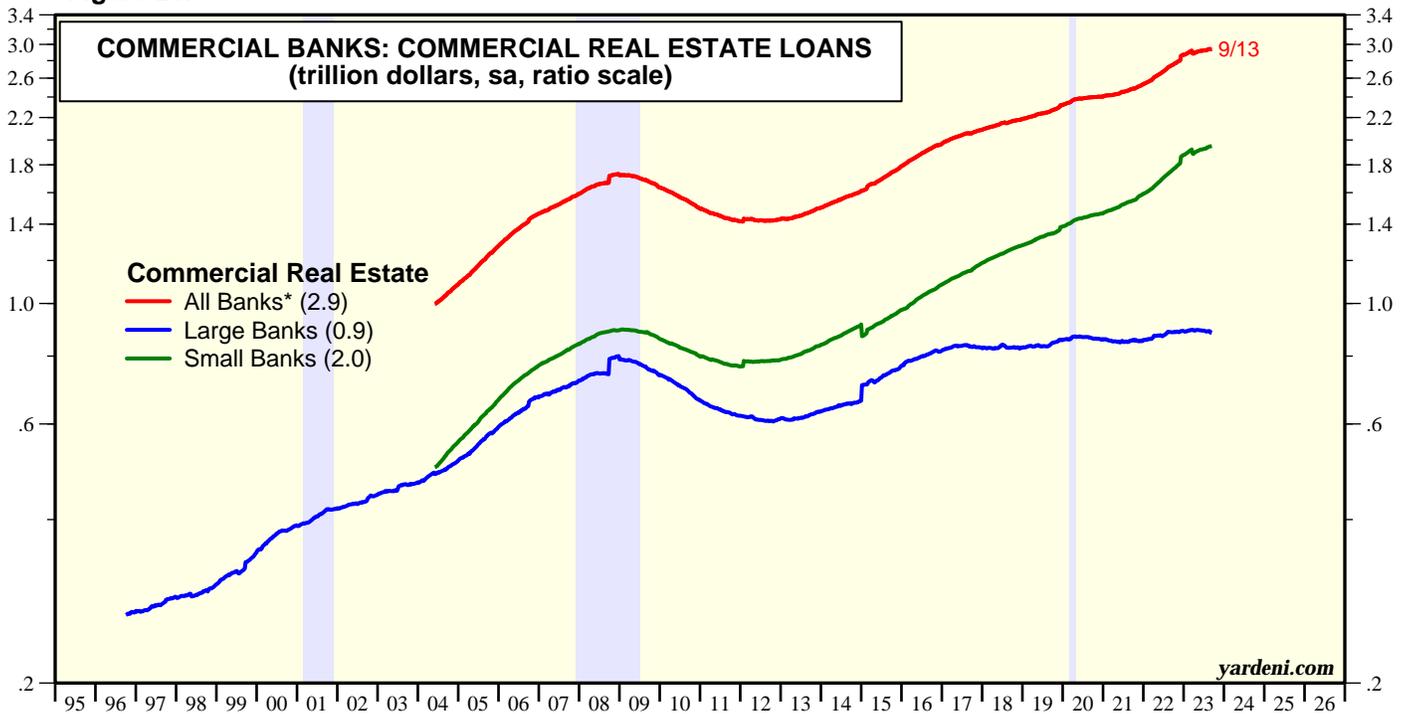
* Includes domestically chartered commercial banks and foreign-related ones.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Federal Reserve Board.

Figure 20.



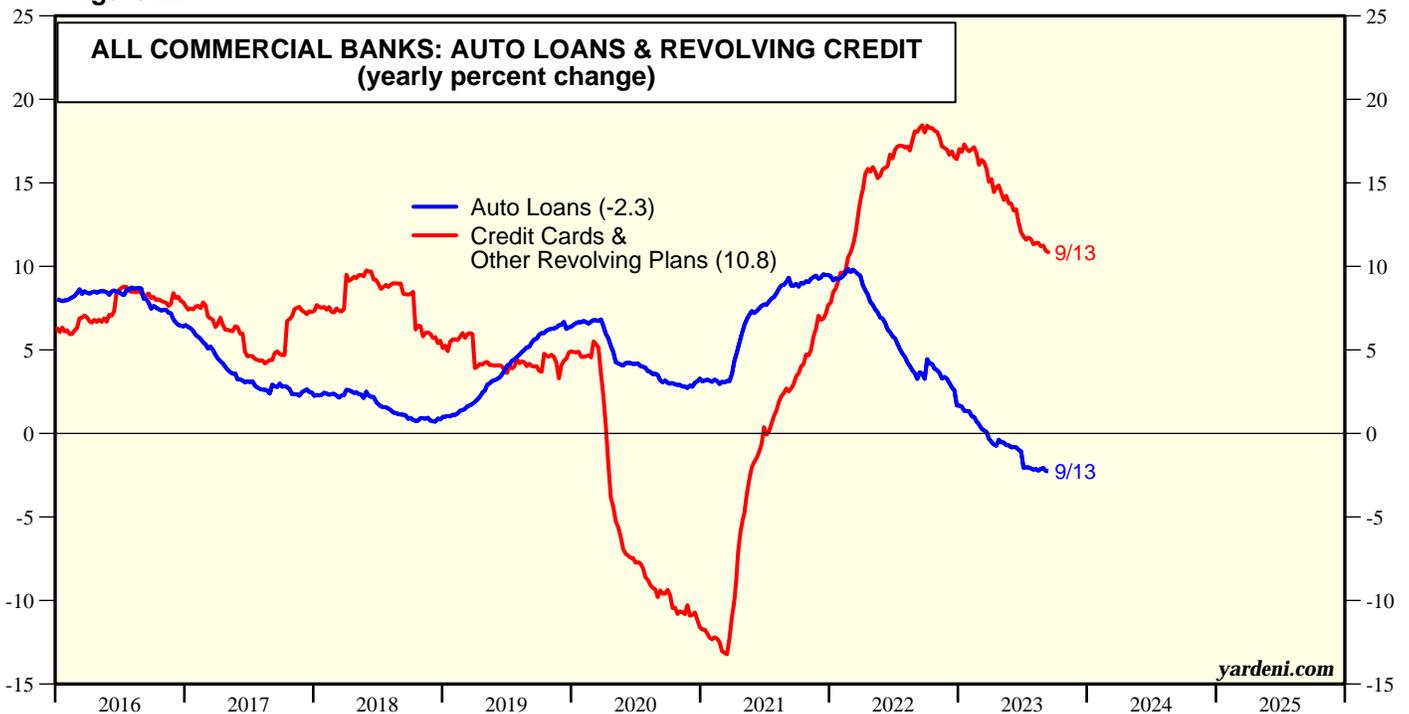
* Includes domestically chartered commercial banks and foreign-related ones.
 ** Using manufacturing & trade Inventories in current dollars.
 Note: Shaded areas are recessions according to the National Bureau of Economic Research.
 Source: Federal Reserve Board.

Figure 21.



* Includes domestically chartered commercial banks and foreign-related ones.
Note: Shaded areas are recessions according to the National Bureau of Economic Research.
Source: Federal Reserve Board.

Figure 22.



Source: Federal Reserve Board.

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