

Chart Collection for Morning Briefing

Yardeni Research, Inc.

August 8, 2017

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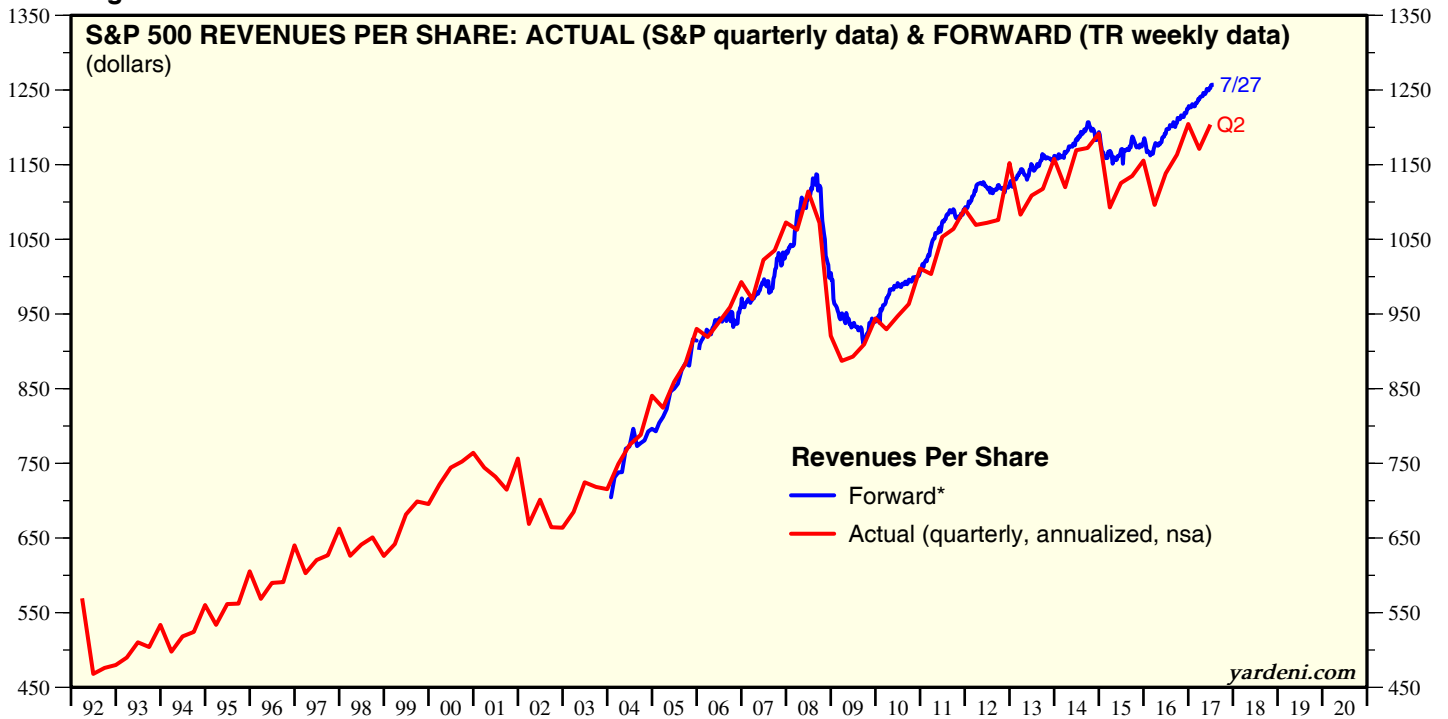
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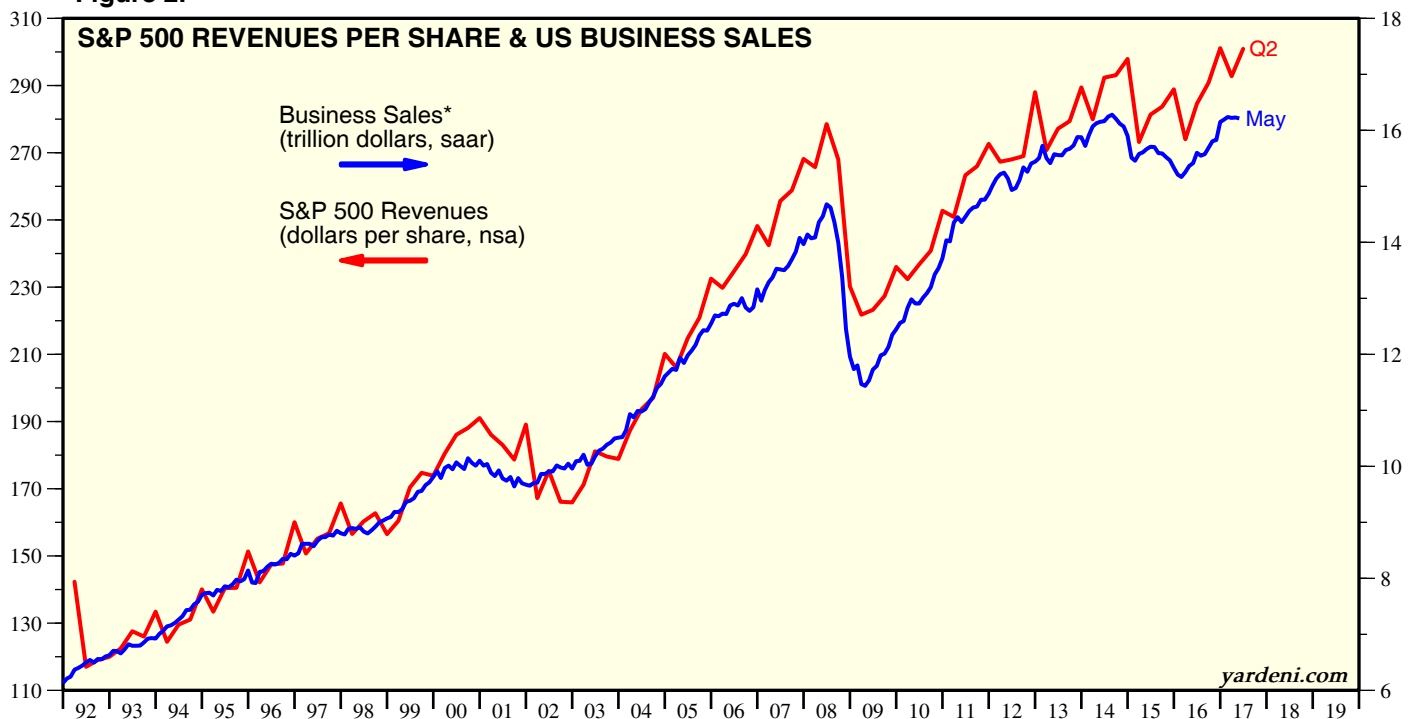
thinking outside the box

Figure 1.



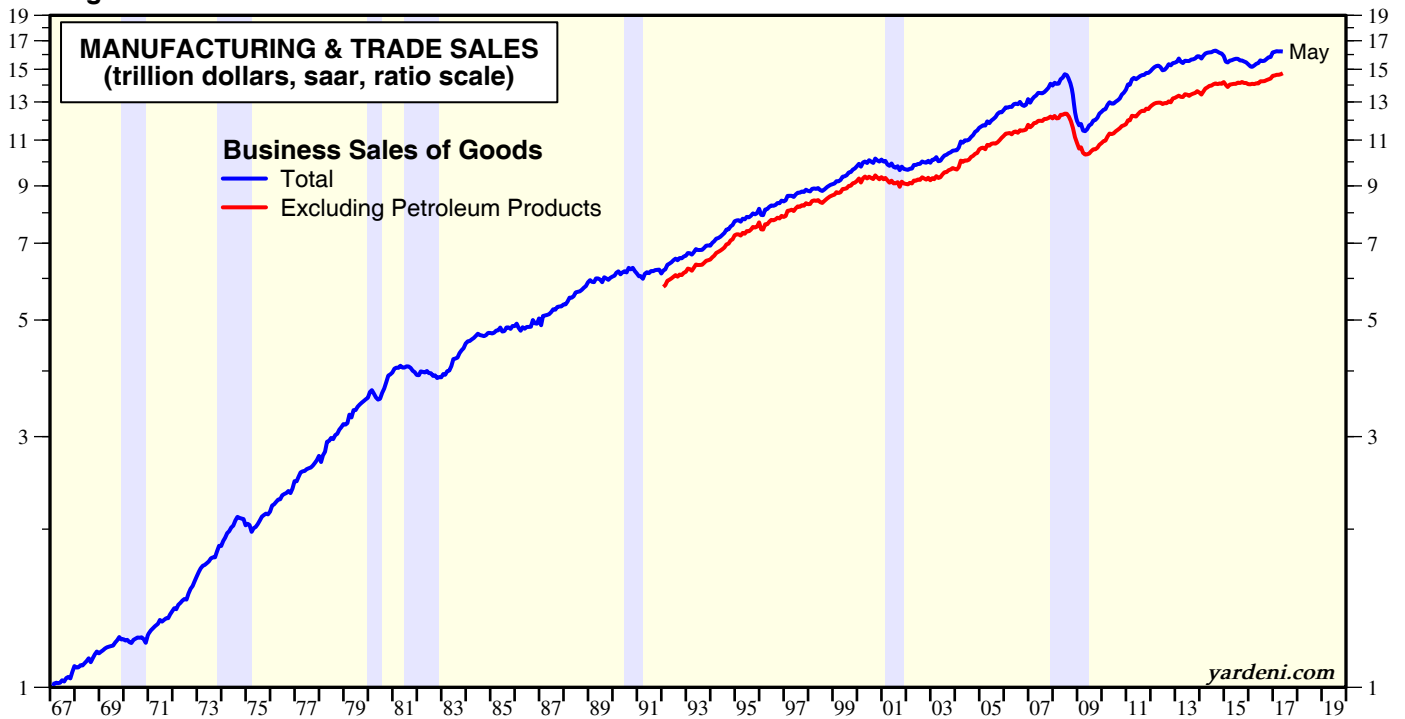
* Time-weighted average of consensus estimates for current and next year. Monthly through December 2005, then weekly.
Source: Standard & Poor's (for actual revenues) and Thomson Reuters I/B/E/S (for forward revenues).

Figure 2.



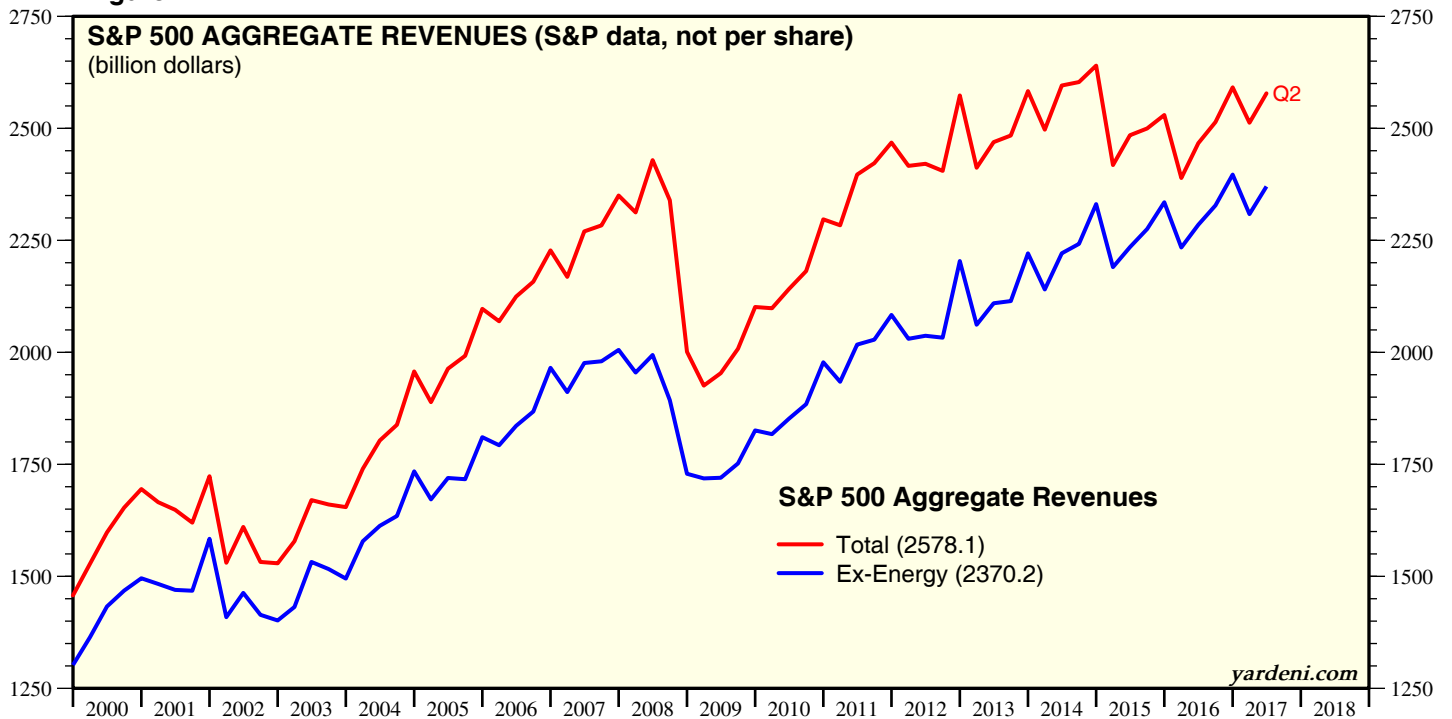
* Manufacturing and trade sales.
Source: Census Bureau and Standard & Poor's.

Figure 3.



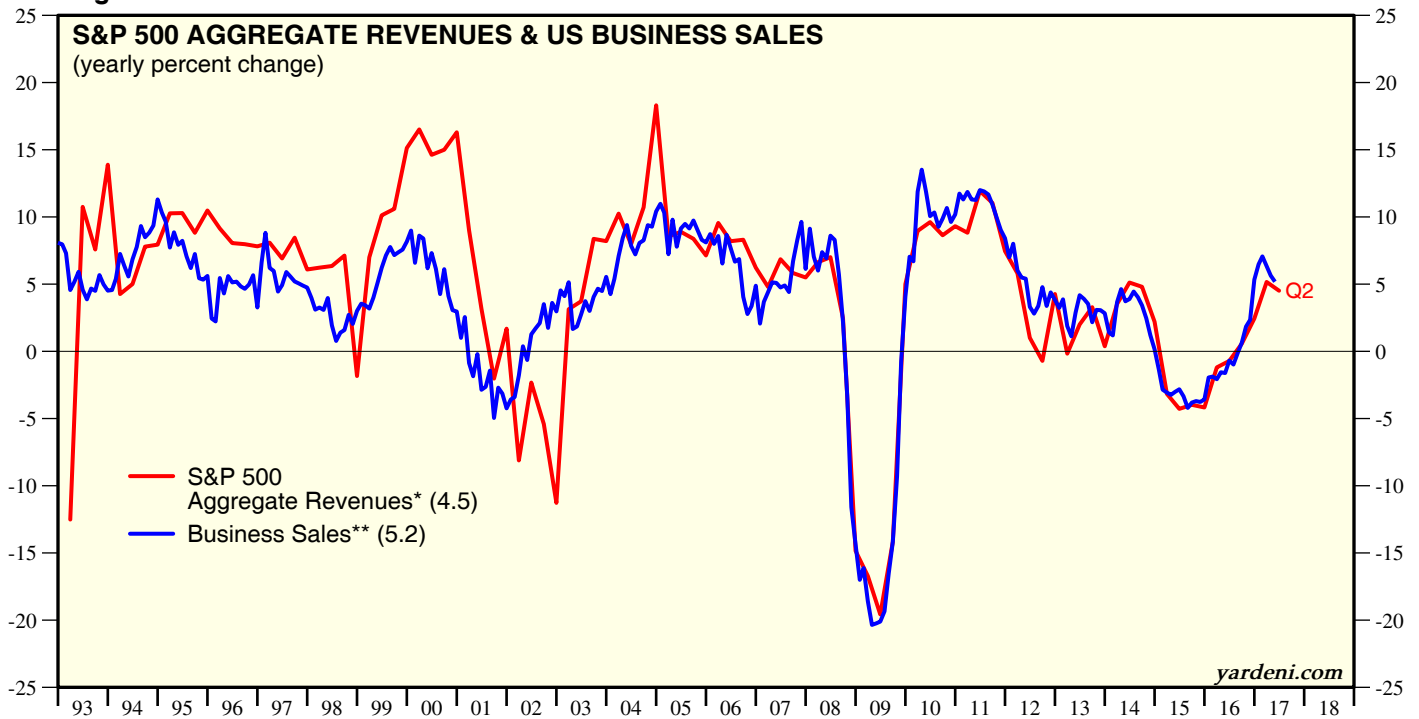
Note: Shaded areas denote recessions according to the National Bureau of Economic Research.
Source: Census Bureau.

Figure 4.



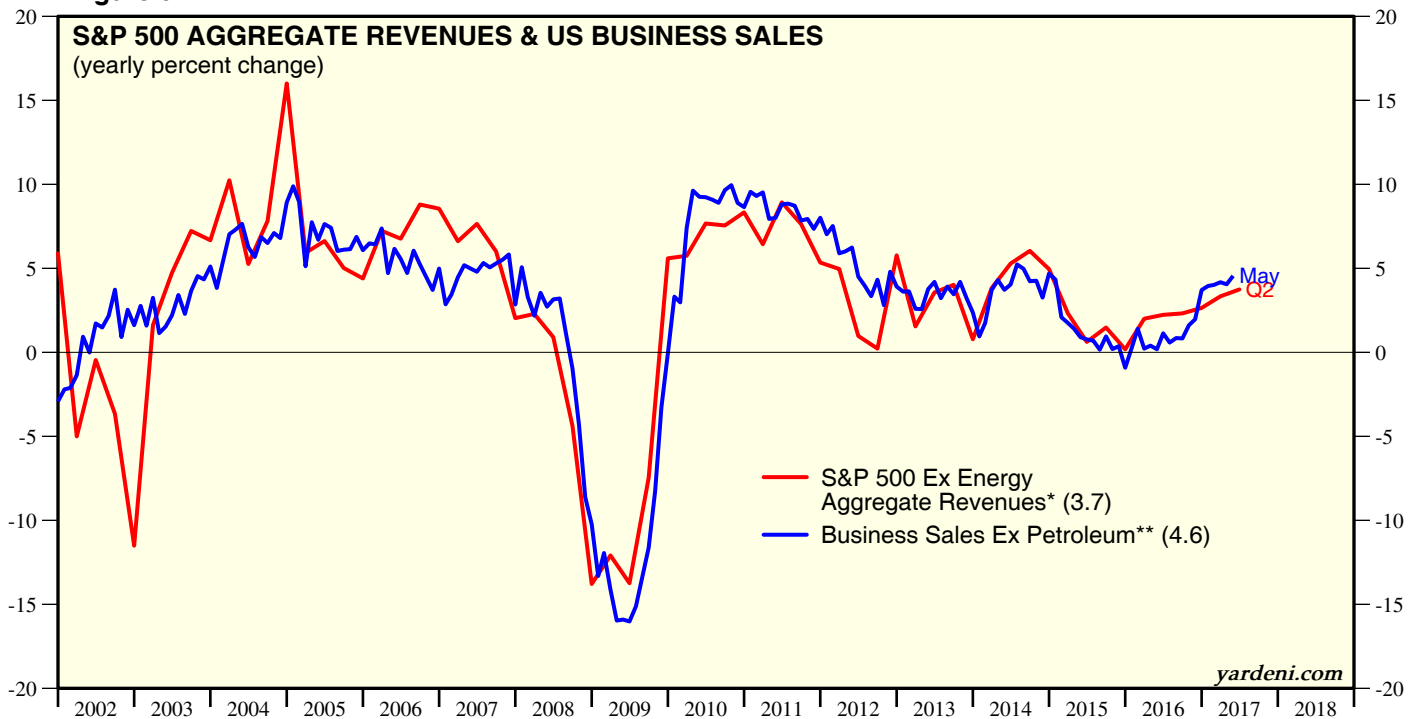
Source: Standard & Poor's.

Figure 5.



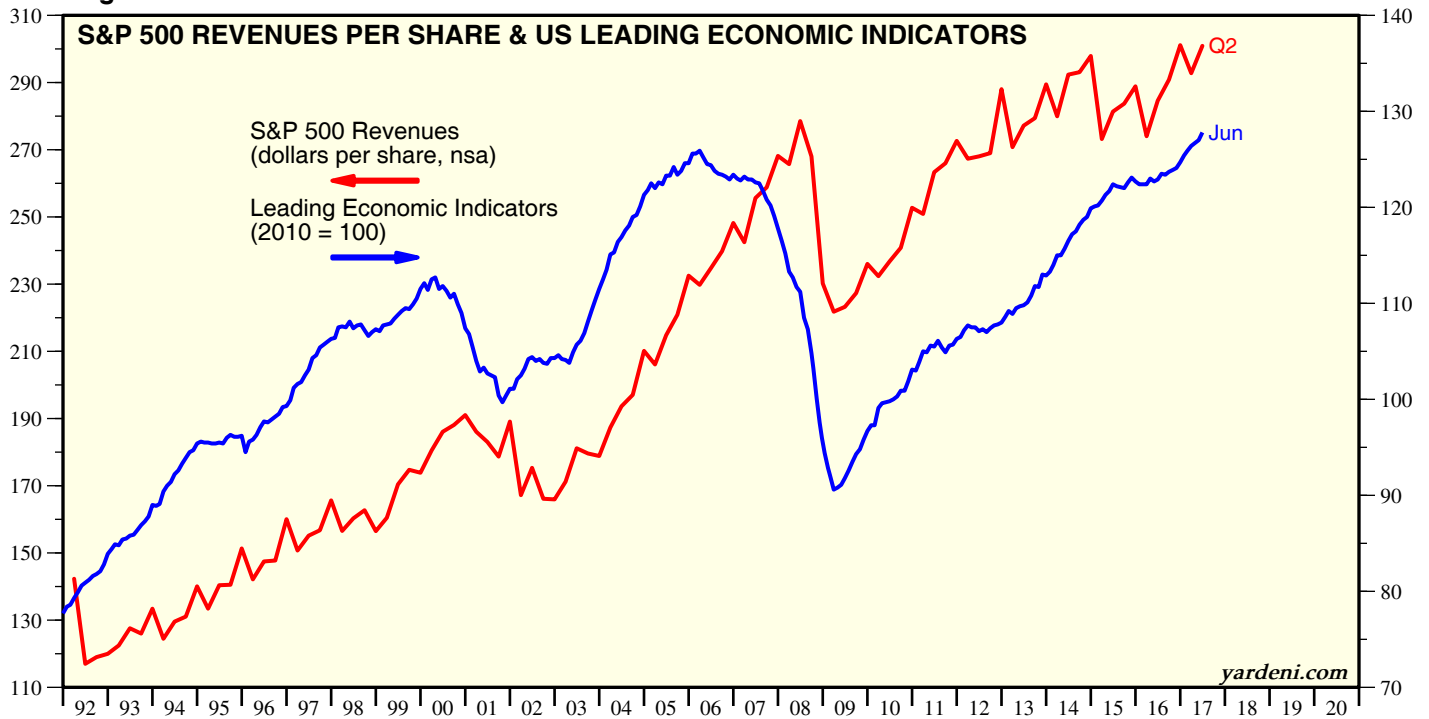
* S&P quarterly data, not per share.
** Manufacturing and trade sales.
Source: Census Bureau and Standard & Poor's.

Figure 6.



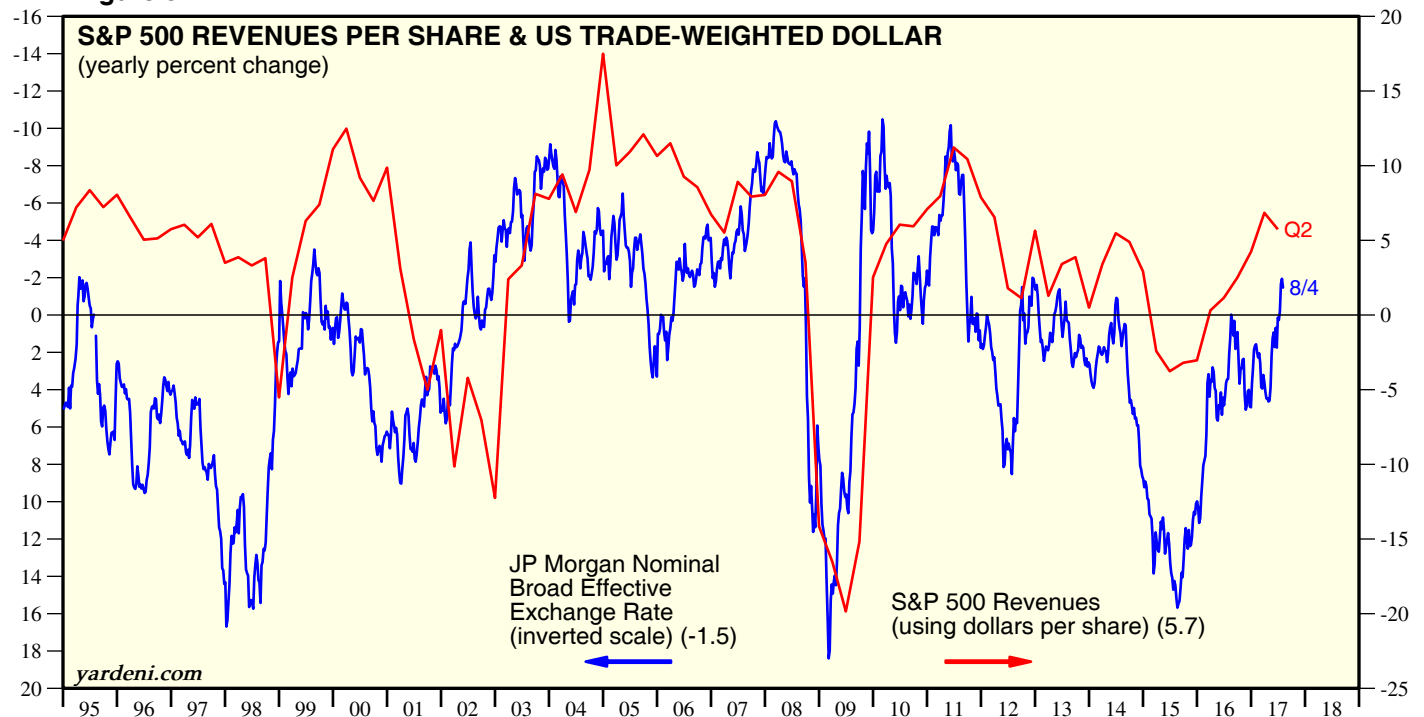
* S&P quarterly data, not per share.
** Manufacturing and trade sales.
Source: Census Bureau and Standard & Poor's.

Figure 7.



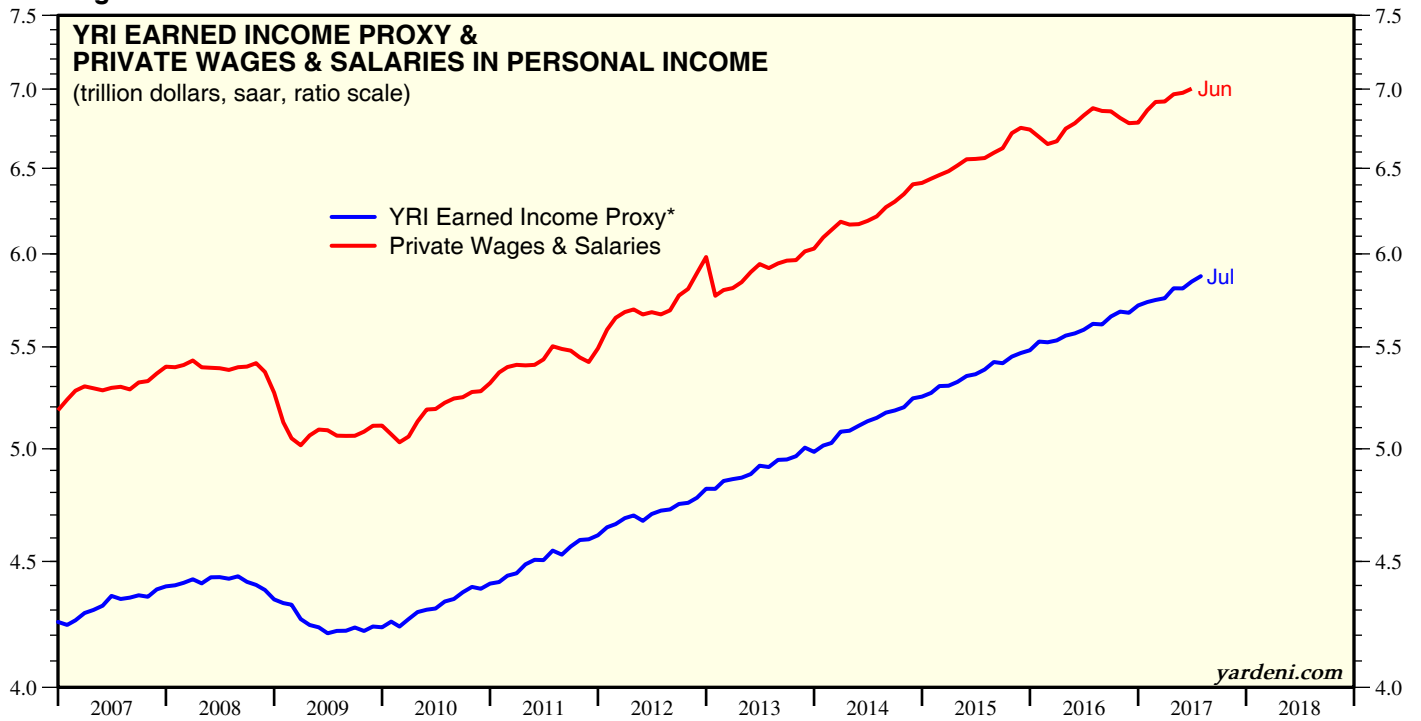
Source: Standard & Poor's and Conference Board.

Figure 8.



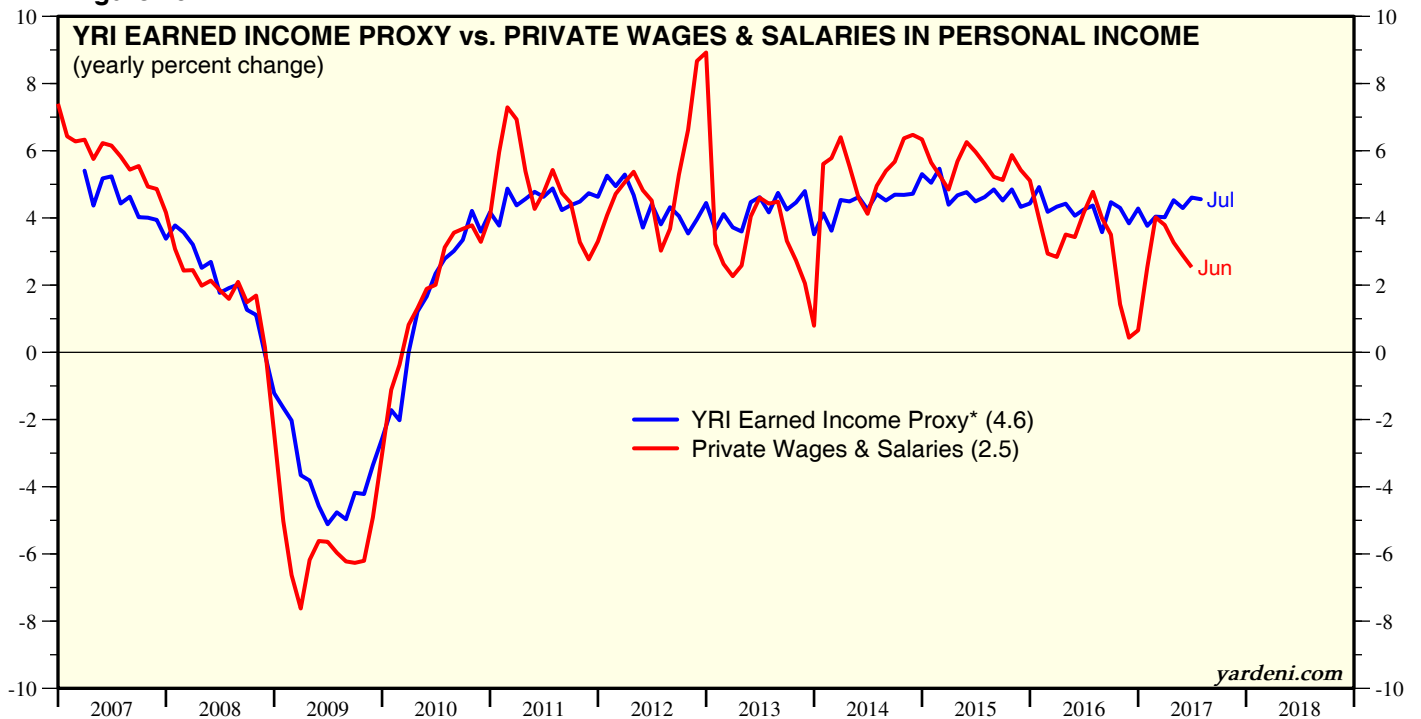
* Argentina, Australia, Brazil, Bulgaria, Canada, Chile, China, Colombia, Croatia, Czech Republic, Denmark, Ecuador, Egypt, France, Germany, Hong Kong, Hungary, Japan, India, Indonesia, Israel, Italy, Korea, Kuwait, Malaysia, Mexico, Morocco, New Zealand, Nigeria, Norway, Pakistan, Panama, Peru, Philippines, Poland, Romania, Russia Saudi Arabia, Singapore, South Africa, Spain, Sweden, Switzerland, Taiwan, Thailand, Turkey, United Kingdom, Ukraine, Uruguay, Venezuela, Vietnam, and United States.
Source: JP Morgan and Standard & Poor's.

Figure 9.



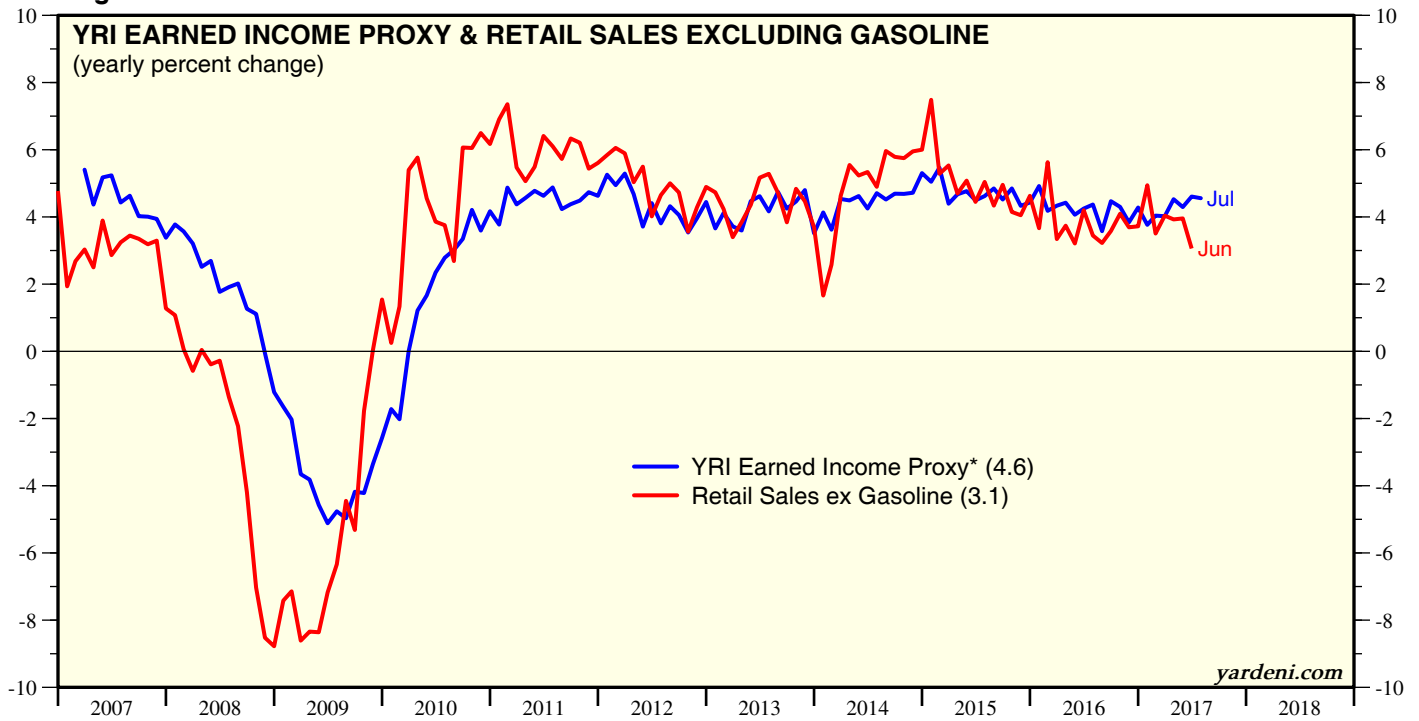
* Aggregate weekly hours times average hourly earnings of total private industries times 52.
 Source: Bureau of Labor Statistics and Bureau of Economic Analysis.

Figure 10.



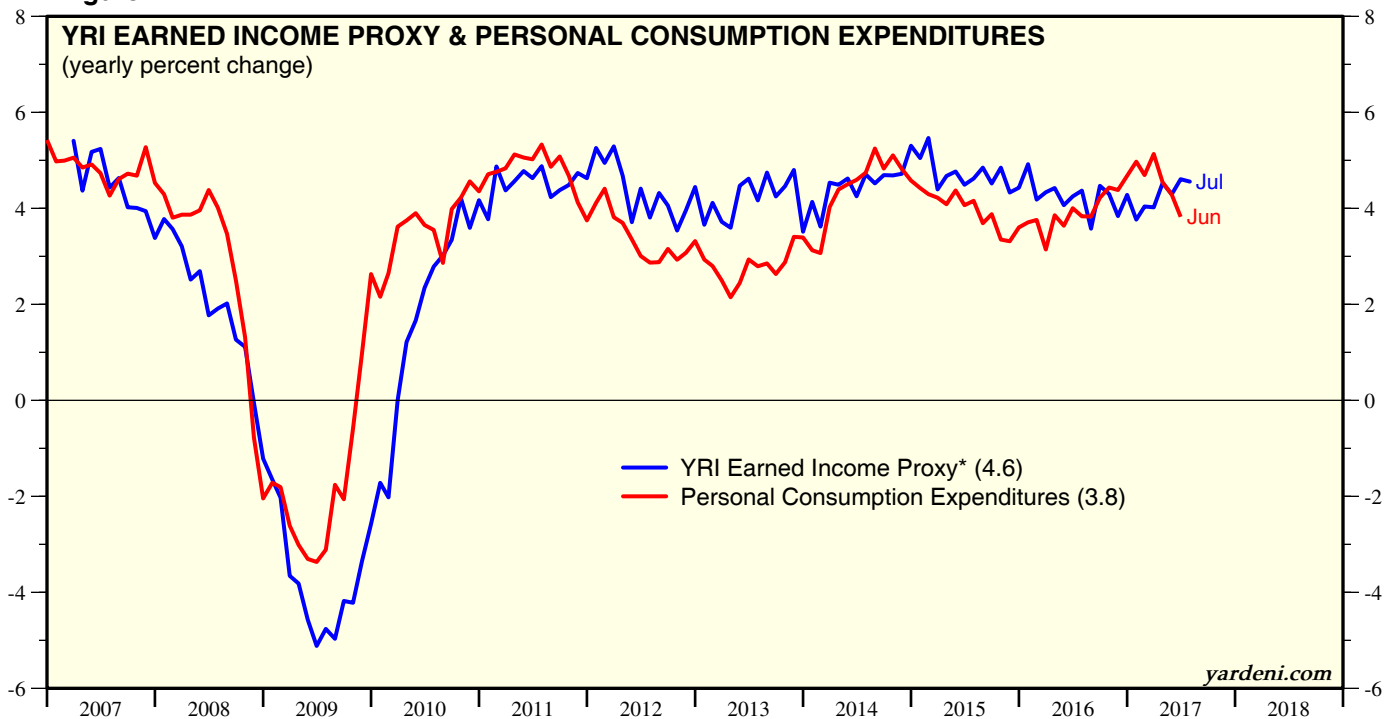
* Aggregate weekly hours times average hourly earnings of total private industries times 52.
 Source: Bureau of Labor Statistics and Bureau of Economic Analysis.

Figure 11.



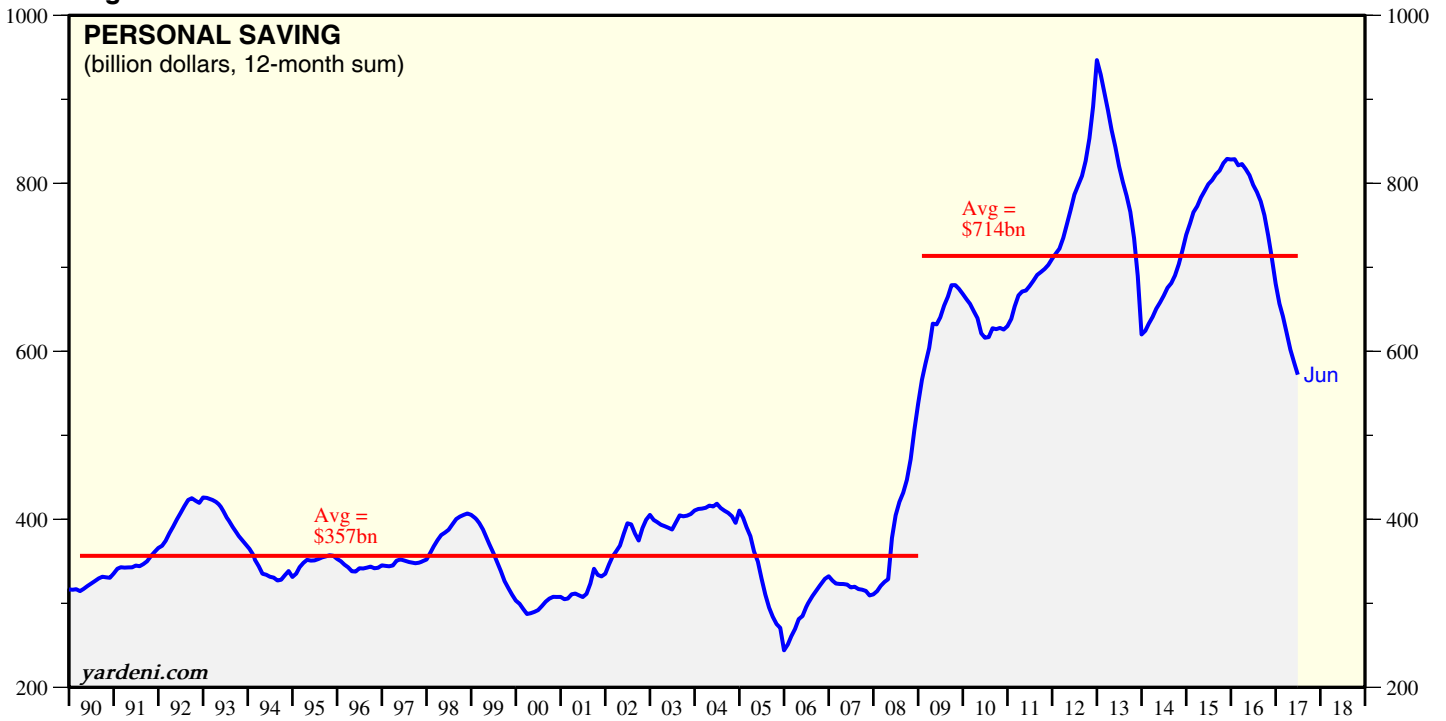
* Aggregate weekly hours times average hourly earnings of total private industries times 52.
 Source: Bureau of Labor Statistics and Bureau of the Census.

Figure 12.



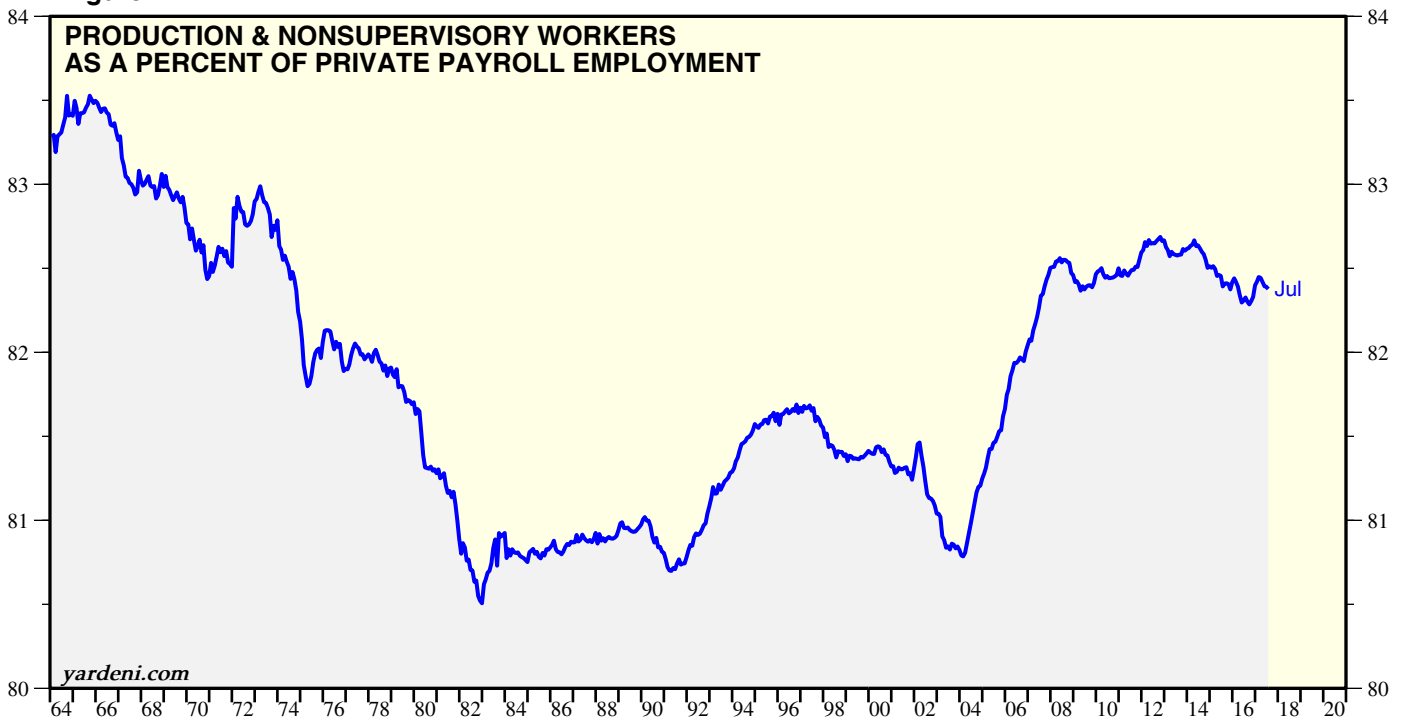
* Aggregate weekly hours times average hourly earnings of total private industries times 52.
 Source: Bureau of Labor Statistics and Bureau of Economic Analysis.

Figure 13.



Source: Bureau of Economic Analysis and Haver Analytics.

Figure 14.



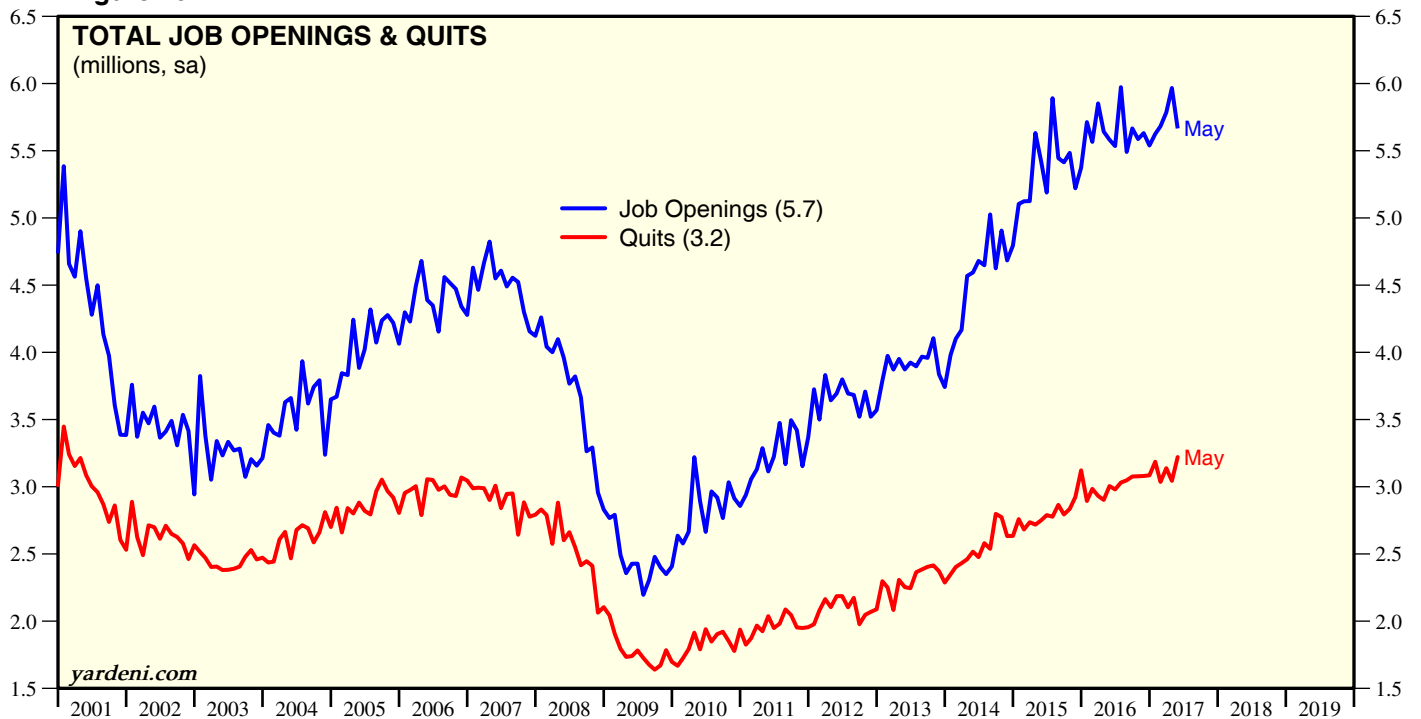
Source: Bureau of Labor Statistics.

Figure 15.



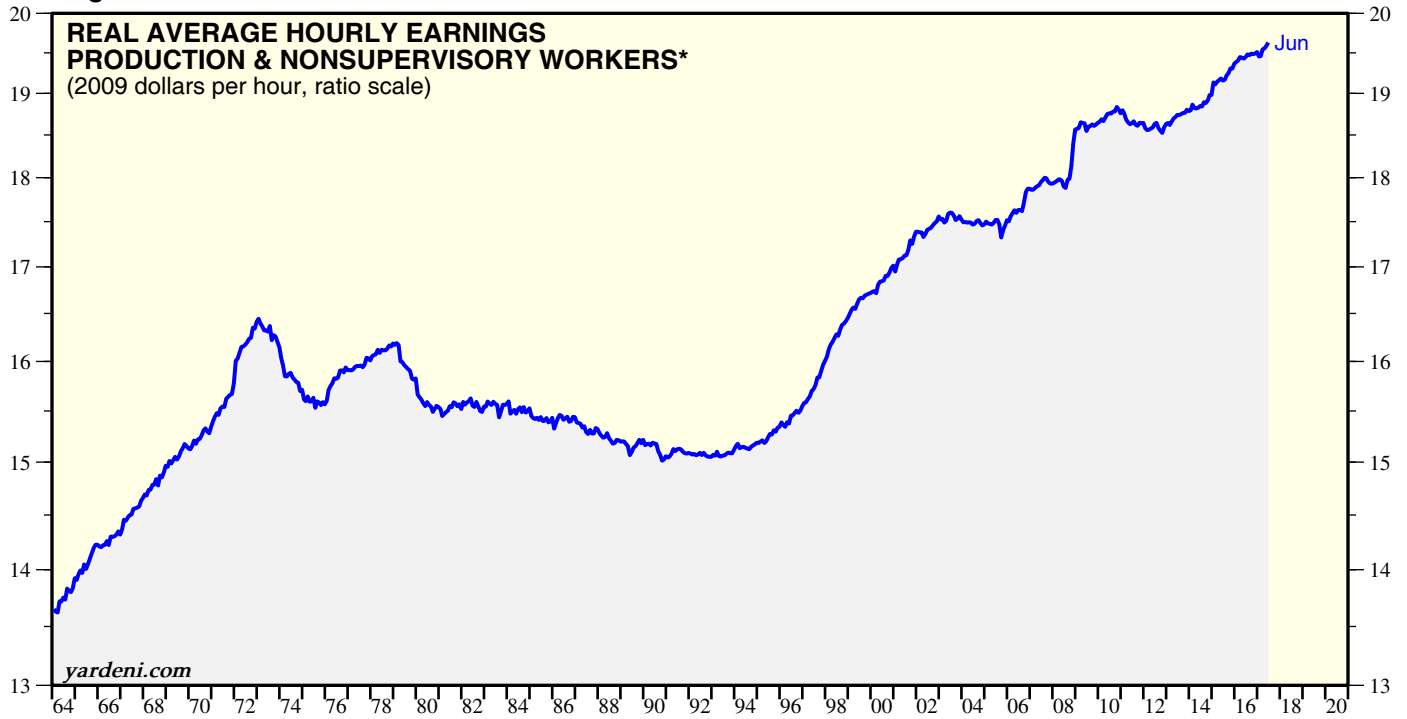
Note: Shaded areas denote recessions according to the National Bureau of Economic Research.
 Source: Bureau of Labor Statistics.

Figure 16.



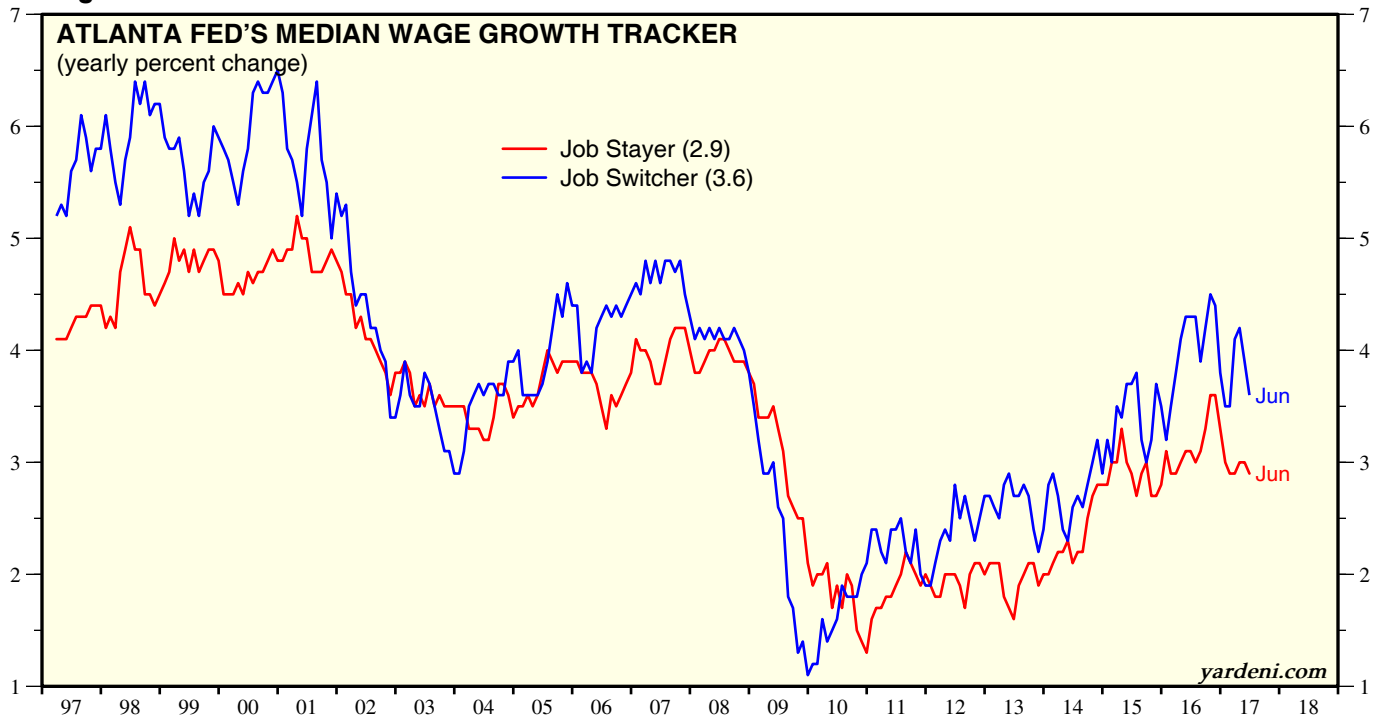
Source: Bureau of Labor Statistics.

Figure 17.



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

Figure 18.



* Three-month moving average of median wage growth.
Source: Bureau of Labor Statistics and Federal Reserve Bank of Atlanta.

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