



**Yardeni  
Research**

## **Chart Collection for Morning Briefing**

**July 3, 2025**

Figure 1

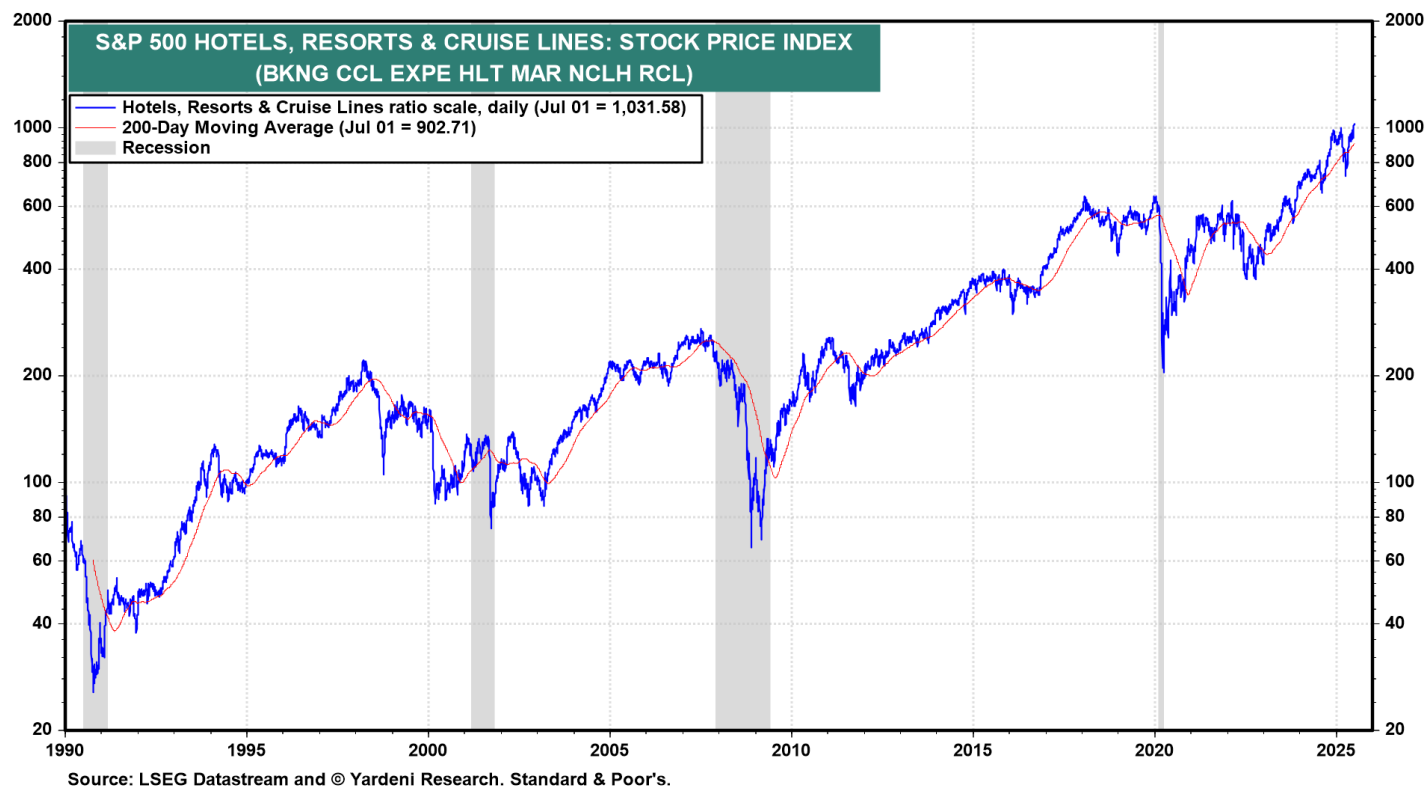


Figure 2



Figure 3

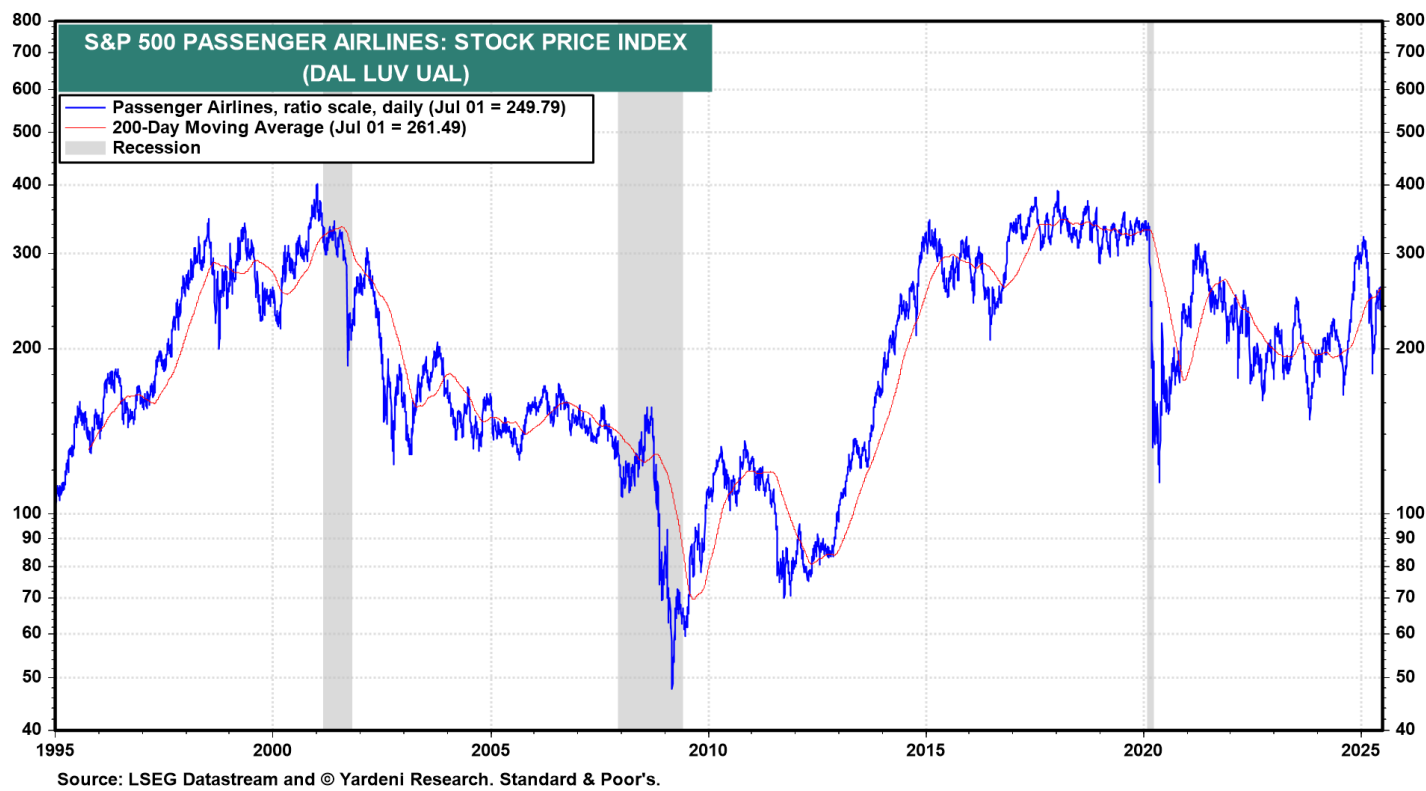


Figure 4

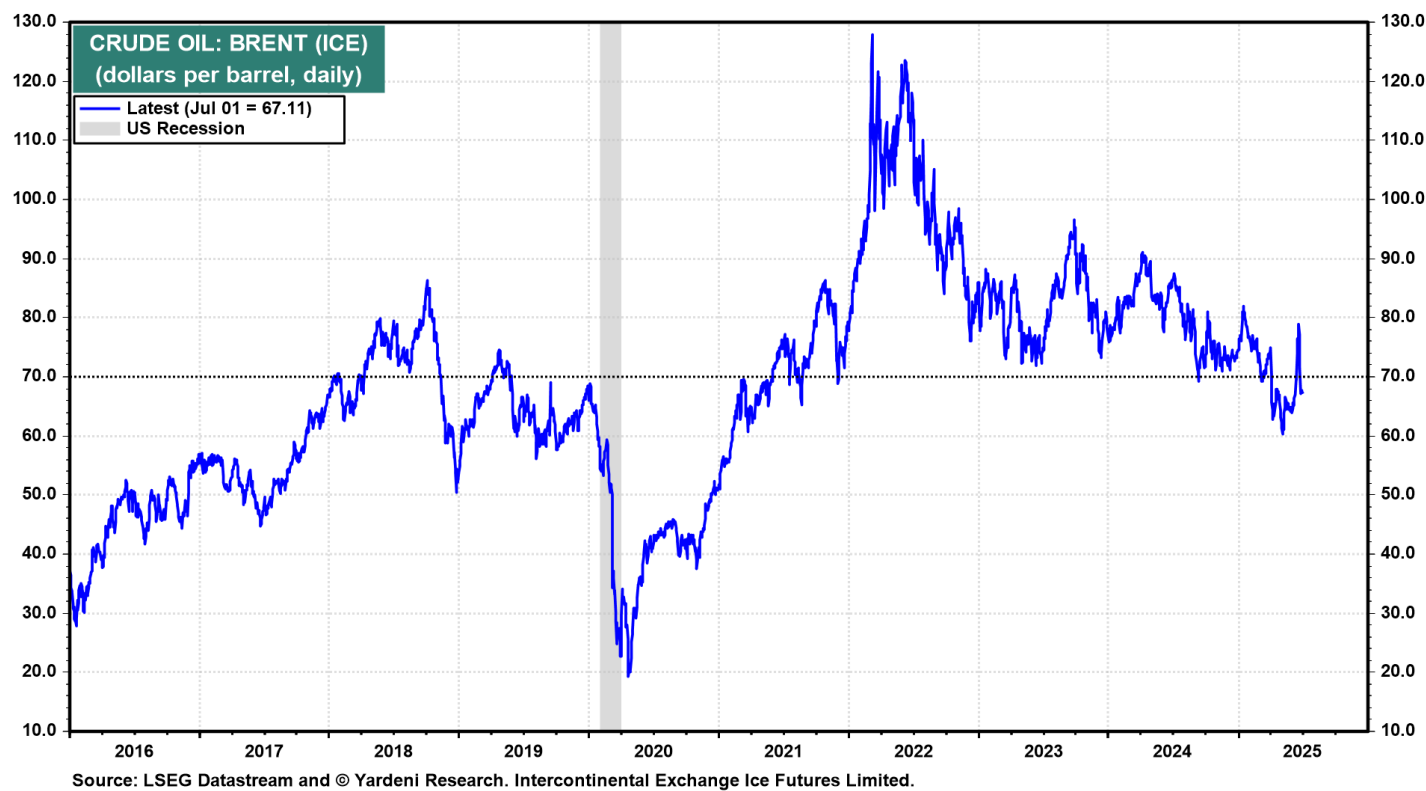


Figure 5

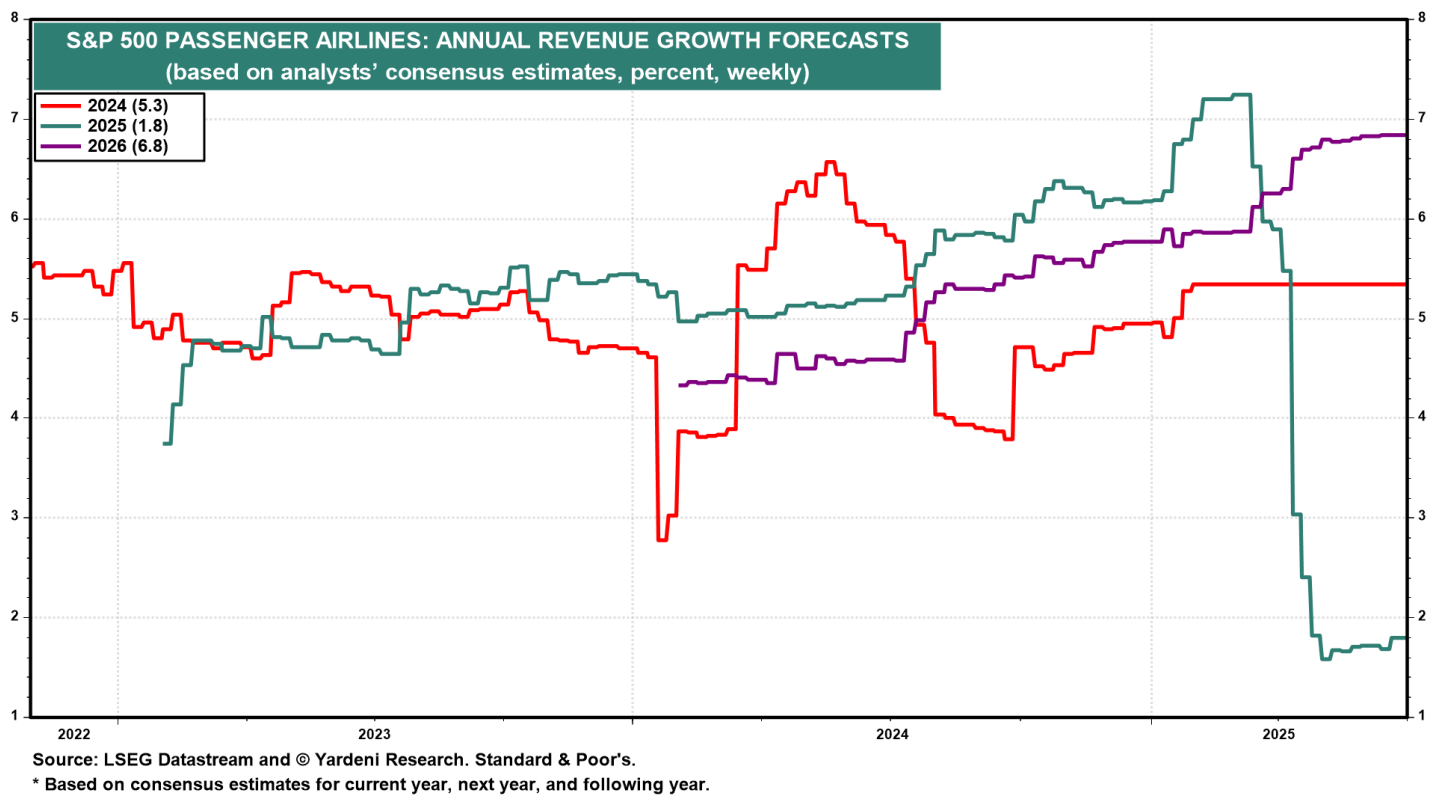


Figure 6

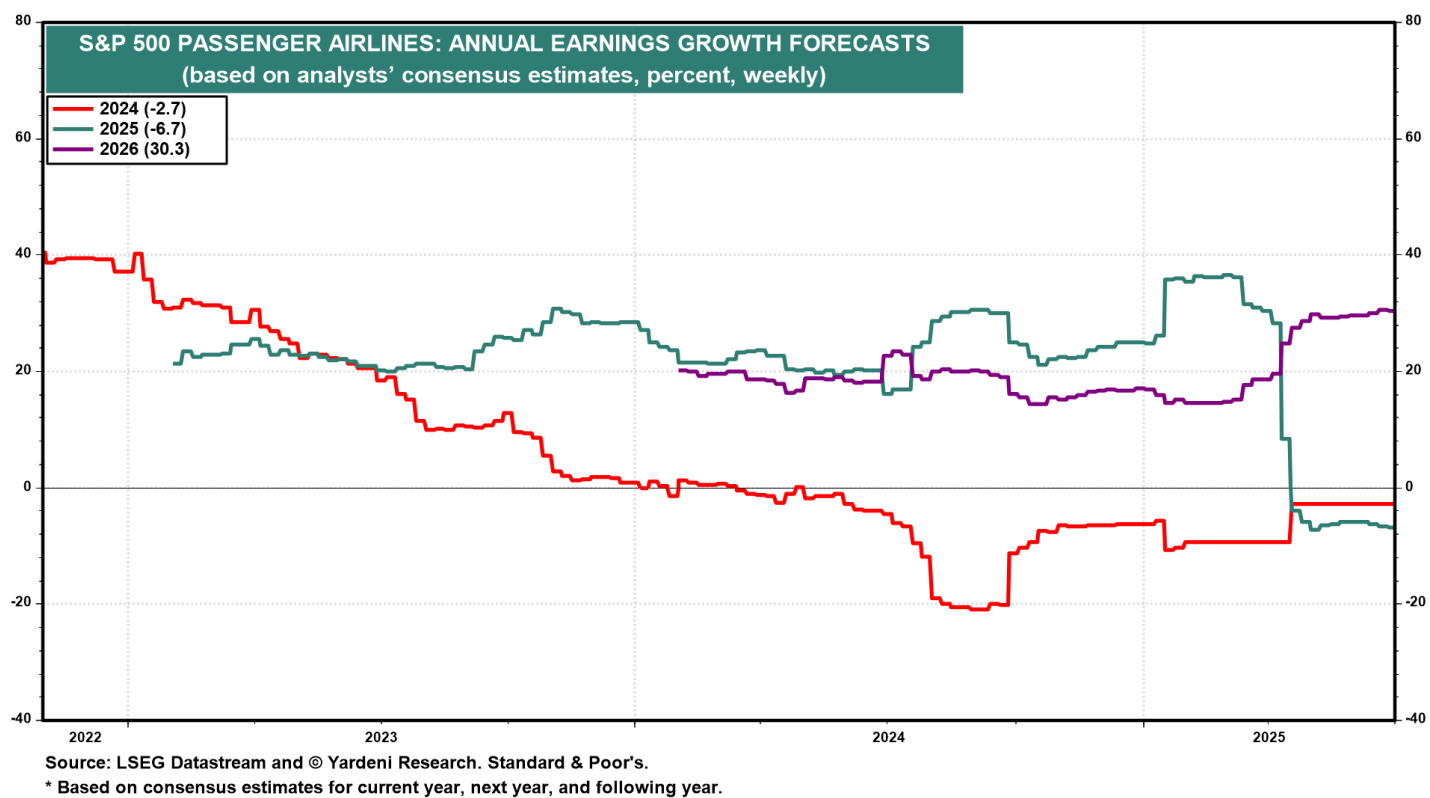


Figure 7

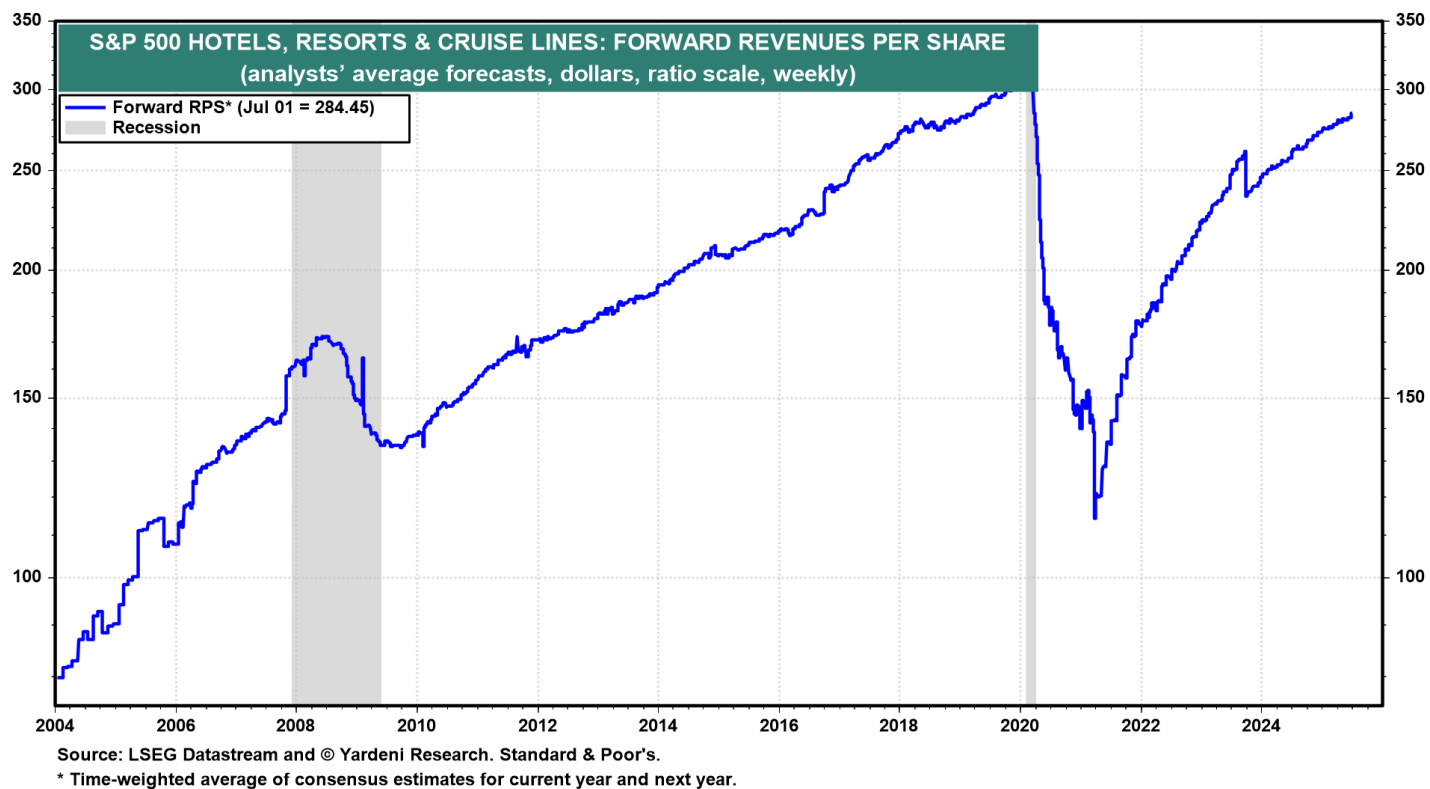


Figure 8

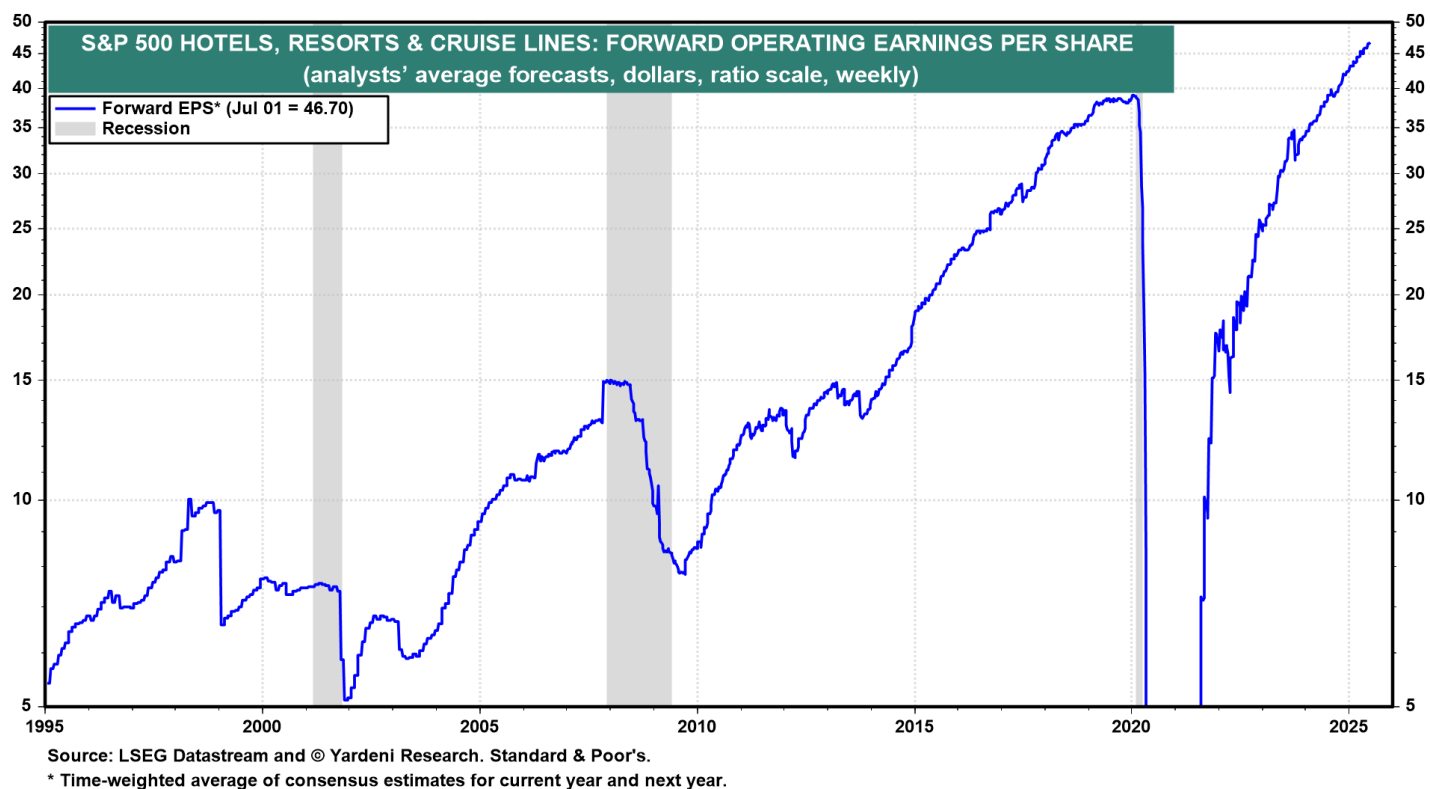


Figure 9

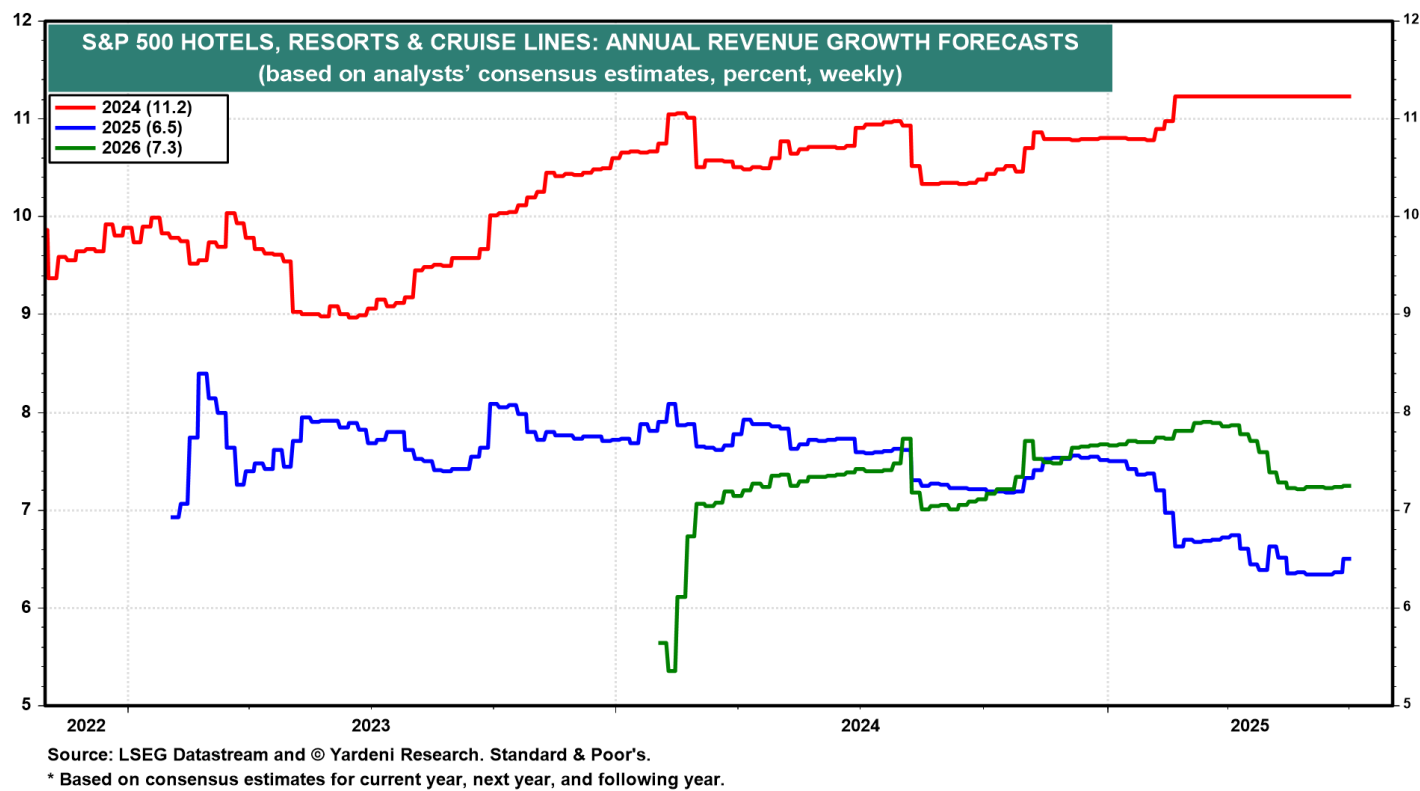


Figure 10

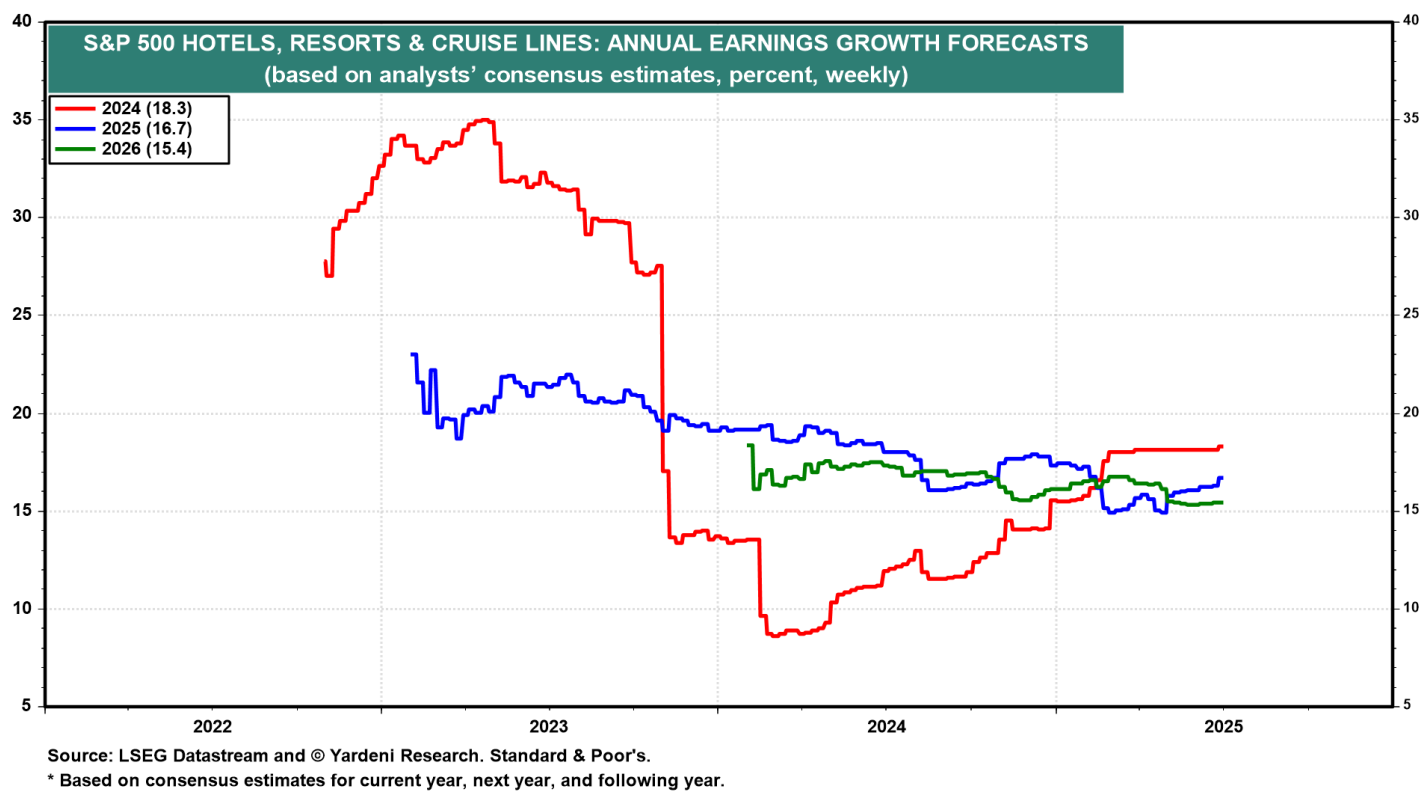


Figure 11

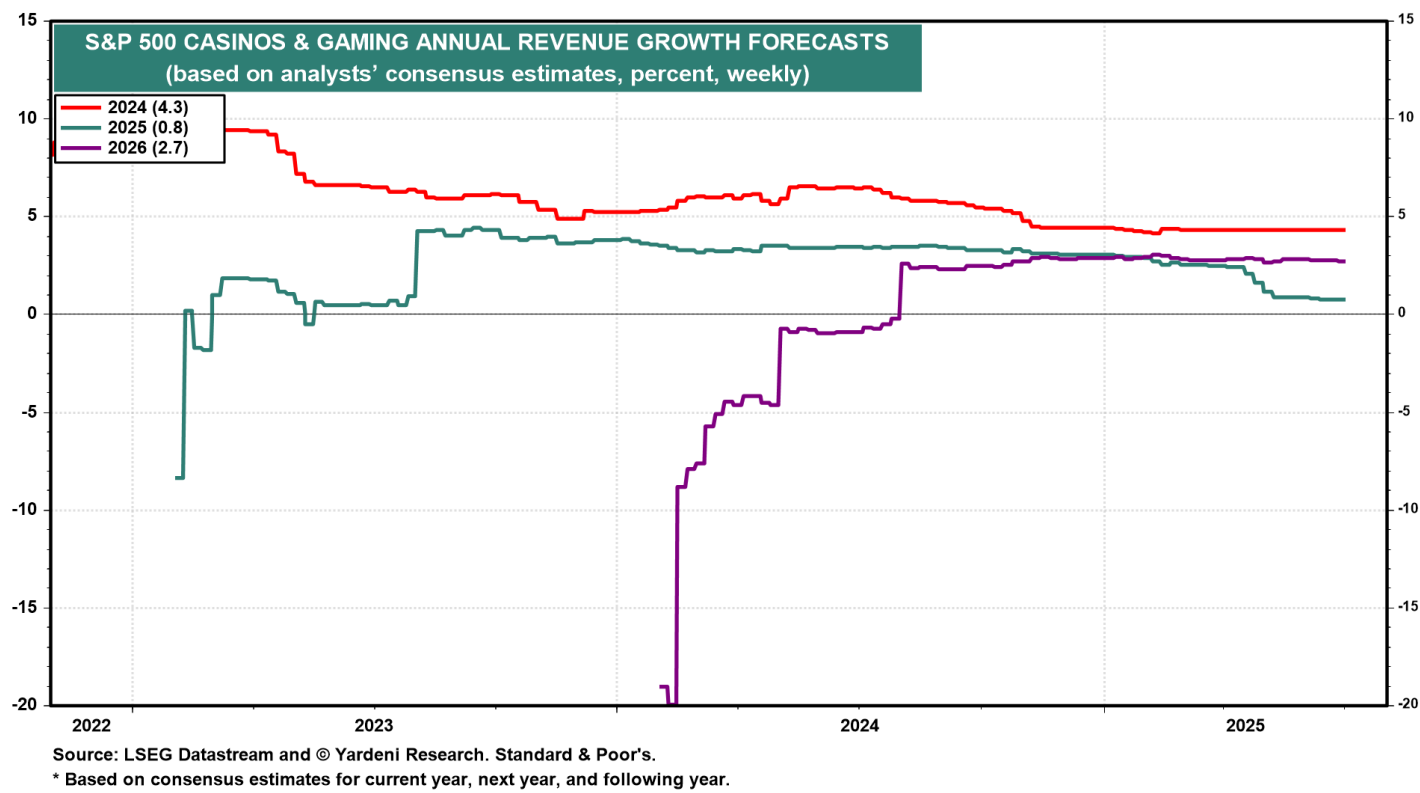


Figure 12

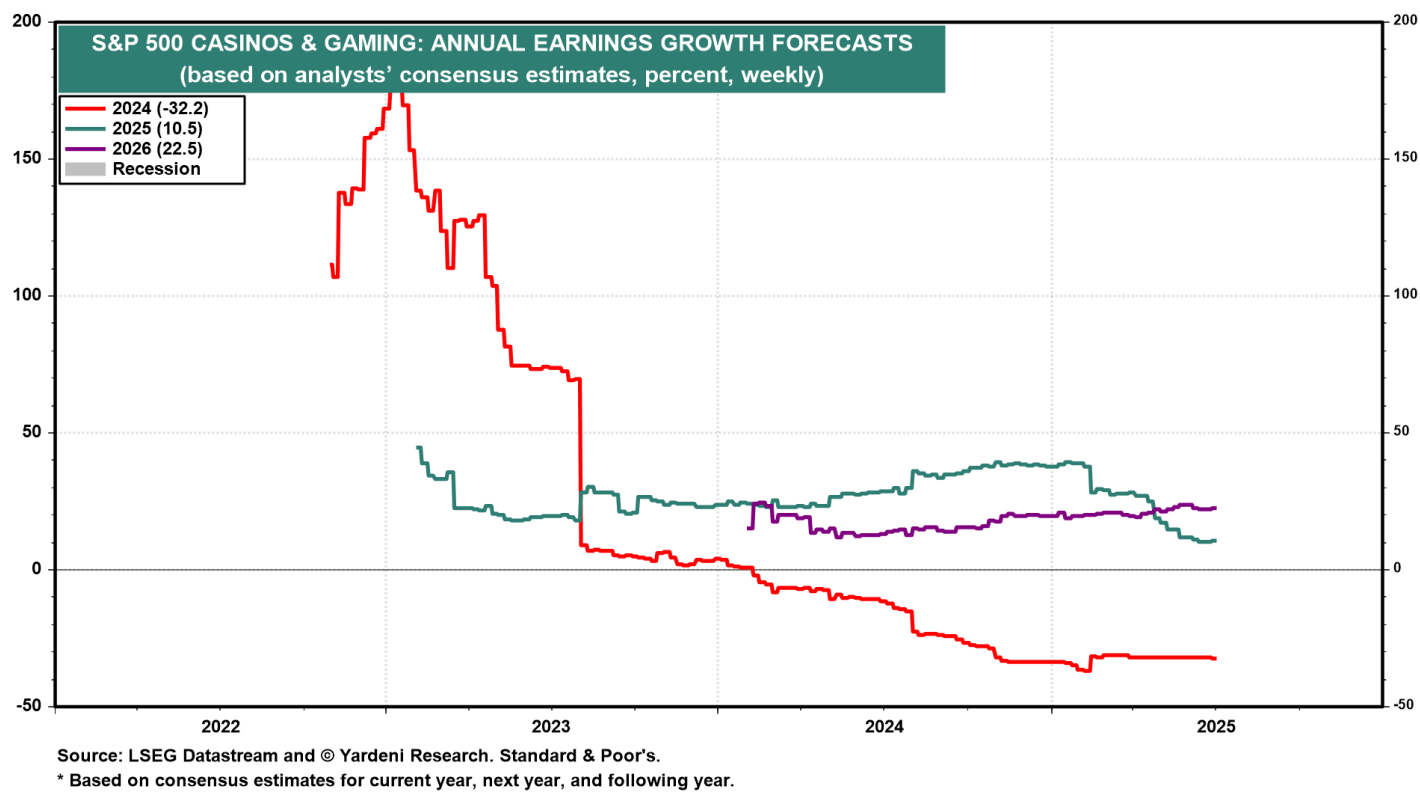


Figure 13

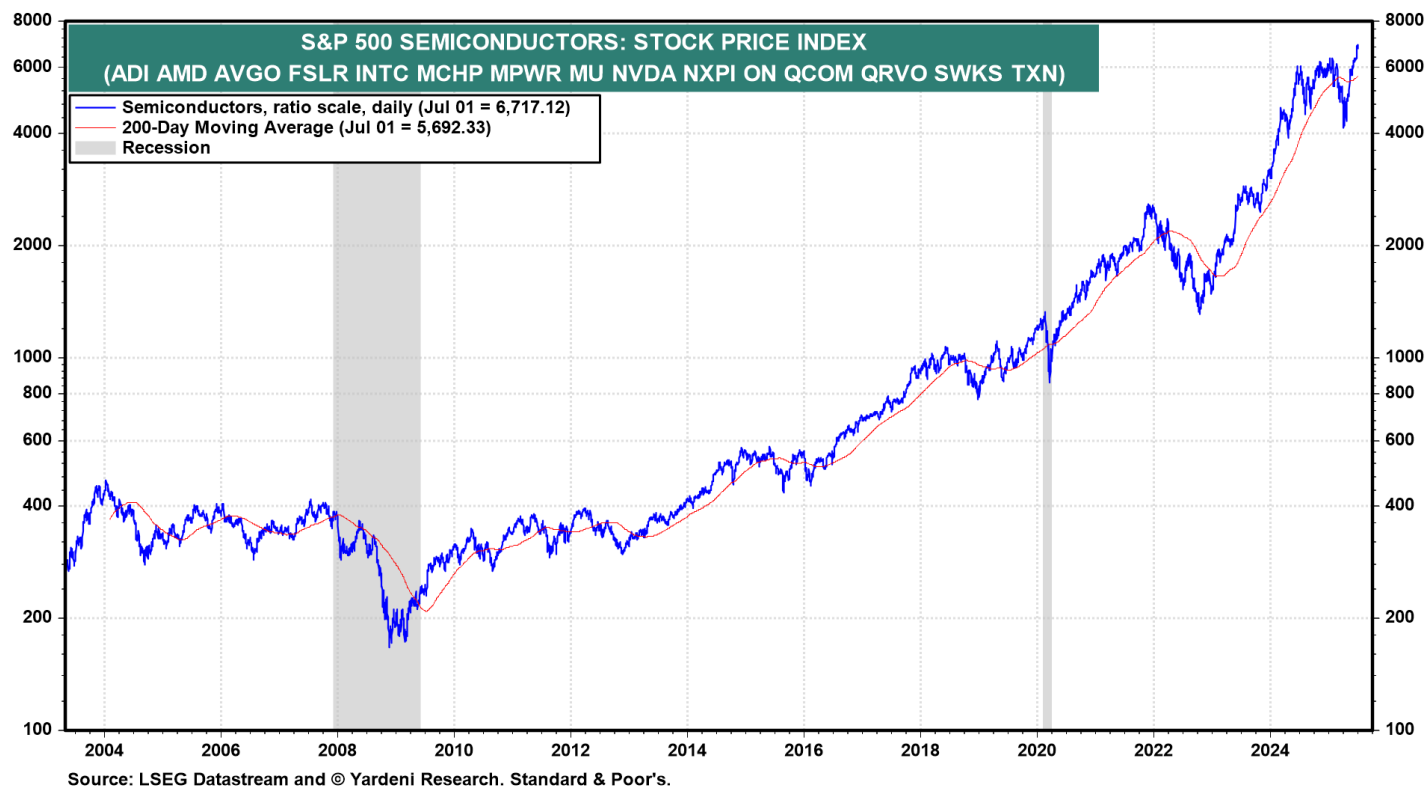


Figure 14

S&P 500 SEMICONDUCTORS' MARKET CAP* (daily, Jul 01, 2025)		
Company	Market Value (billion dollars)	Percent of Industry's Market Cap
S&P 500 Semiconductors	6,106.0	100.0
Nvidia	3,740.5	61.3
Broadcom	1,182.9	19.4
Advanced Micro Devices	209.7	3.4
Texas Instruments	179.7	2.9
Qualcomm	162.5	2.7
Micron Technology	128.5	2.1
Analog Devices	113.5	1.9
Intel	93.7	1.5
Nxp Semiconductors	46.9	0.8
Microchip Tech.	36.0	0.6
Monolithic Pwr. Sys.	30.4	0.5
On Semiconductor	17.7	0.3
First Solar	16.4	0.3
Skyworks Solutions	10.4	0.2

\* Market capitalizations are float-adjusted and may not sum to total (or 100%) due to weighting adjustments.

Source: LSEG Datastream and © Yardeni Research. Standard & Poors.



Figure 15

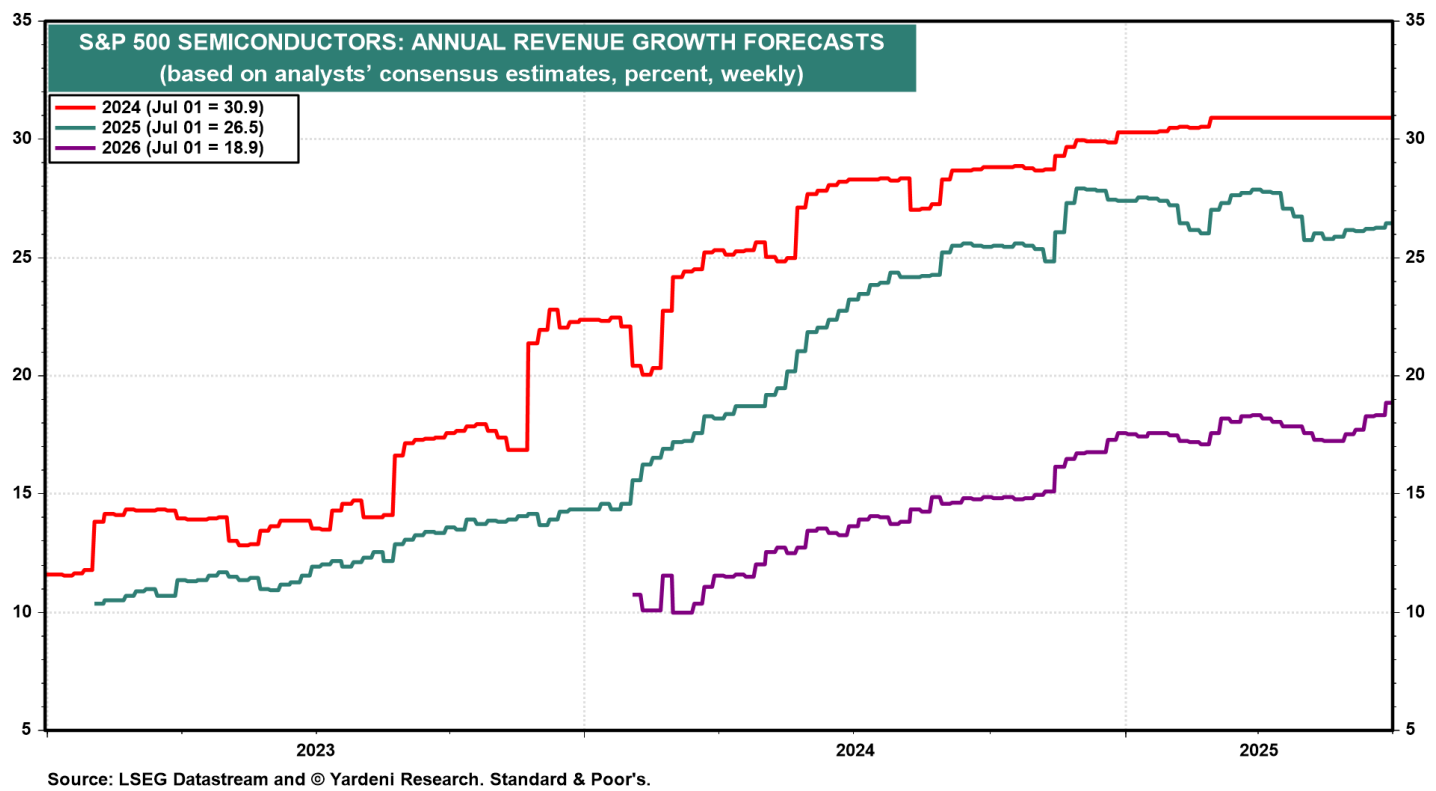


Figure 16

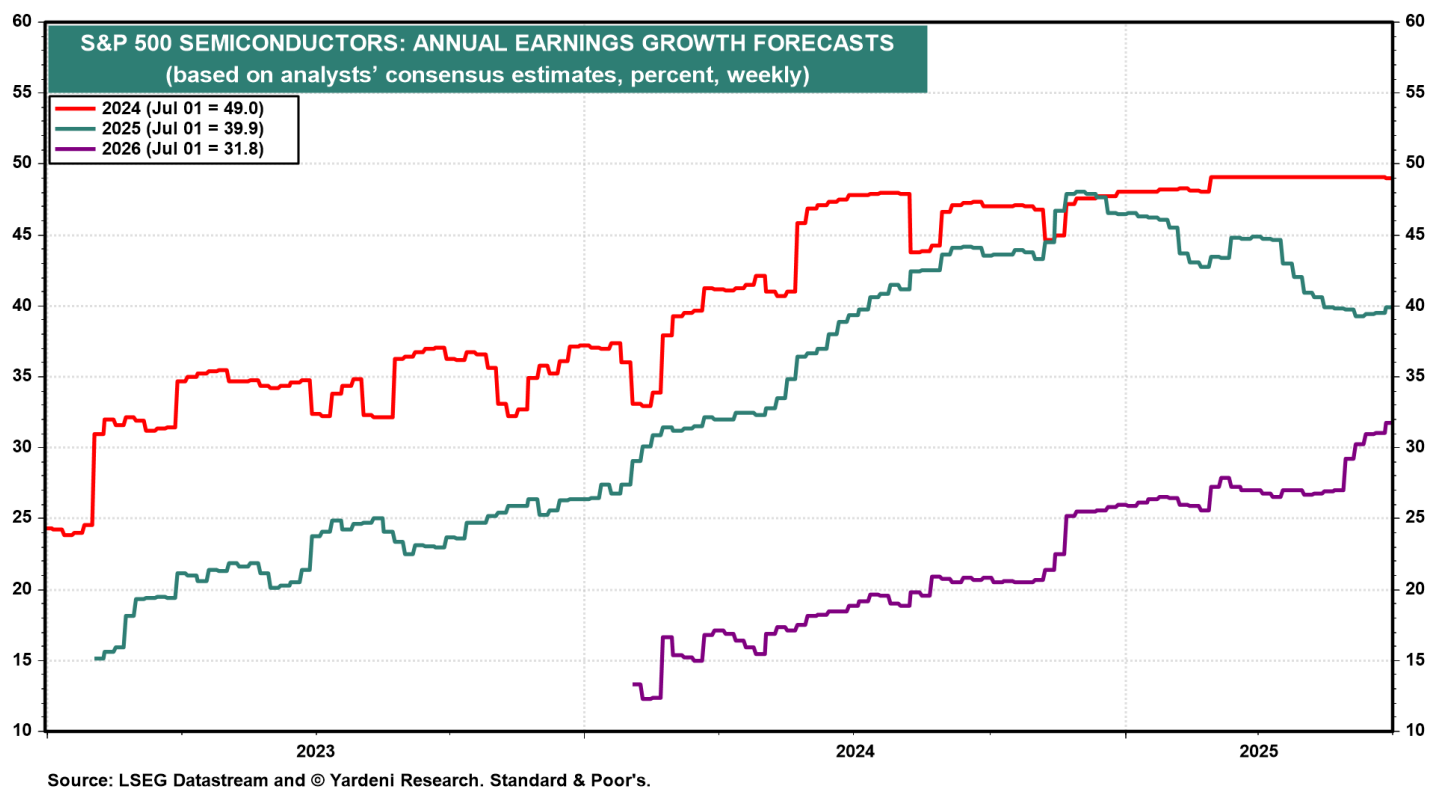
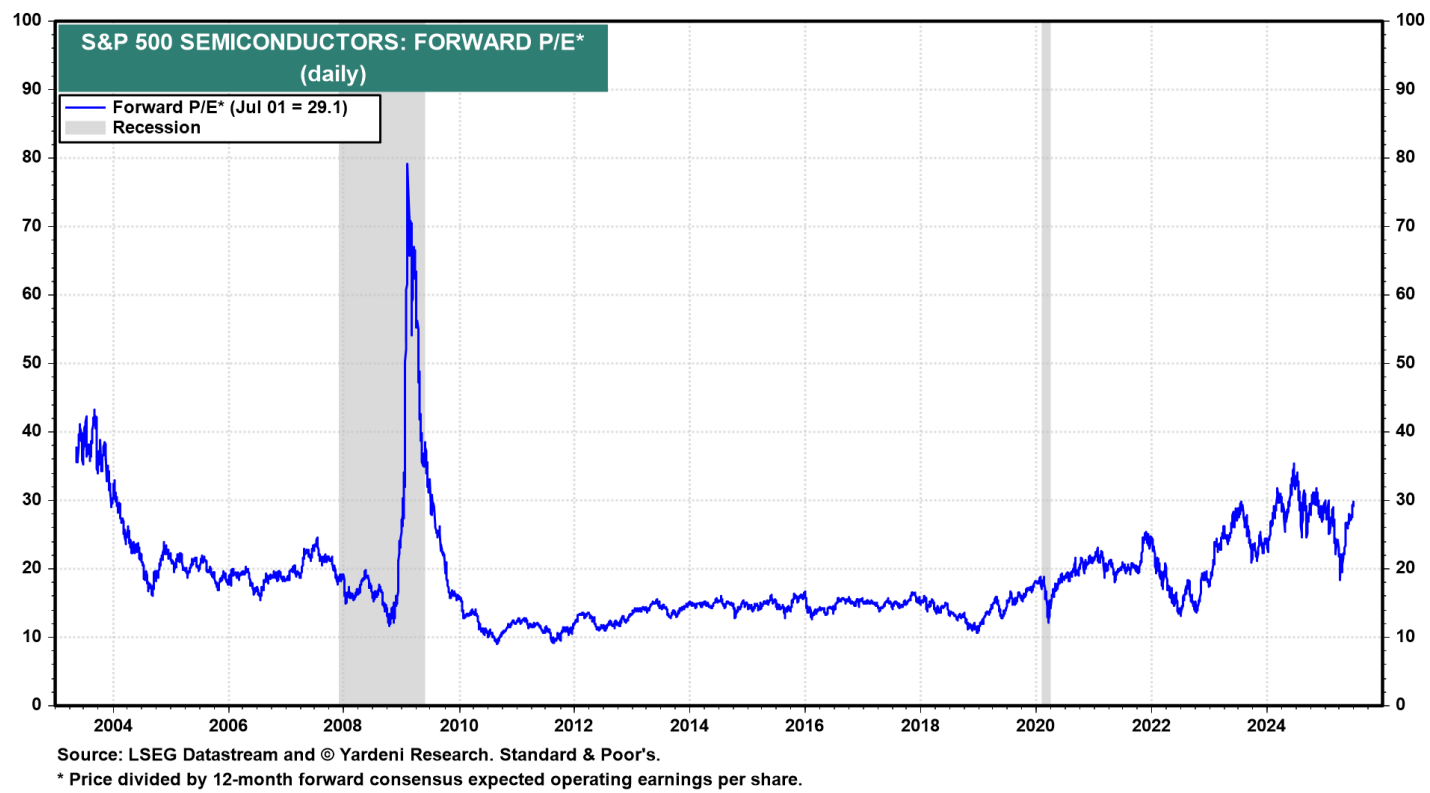


Figure 17



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