



**Yardeni  
Research**

## **Chart Collection for Morning Briefing**

**August 7, 2025**

Figure 1

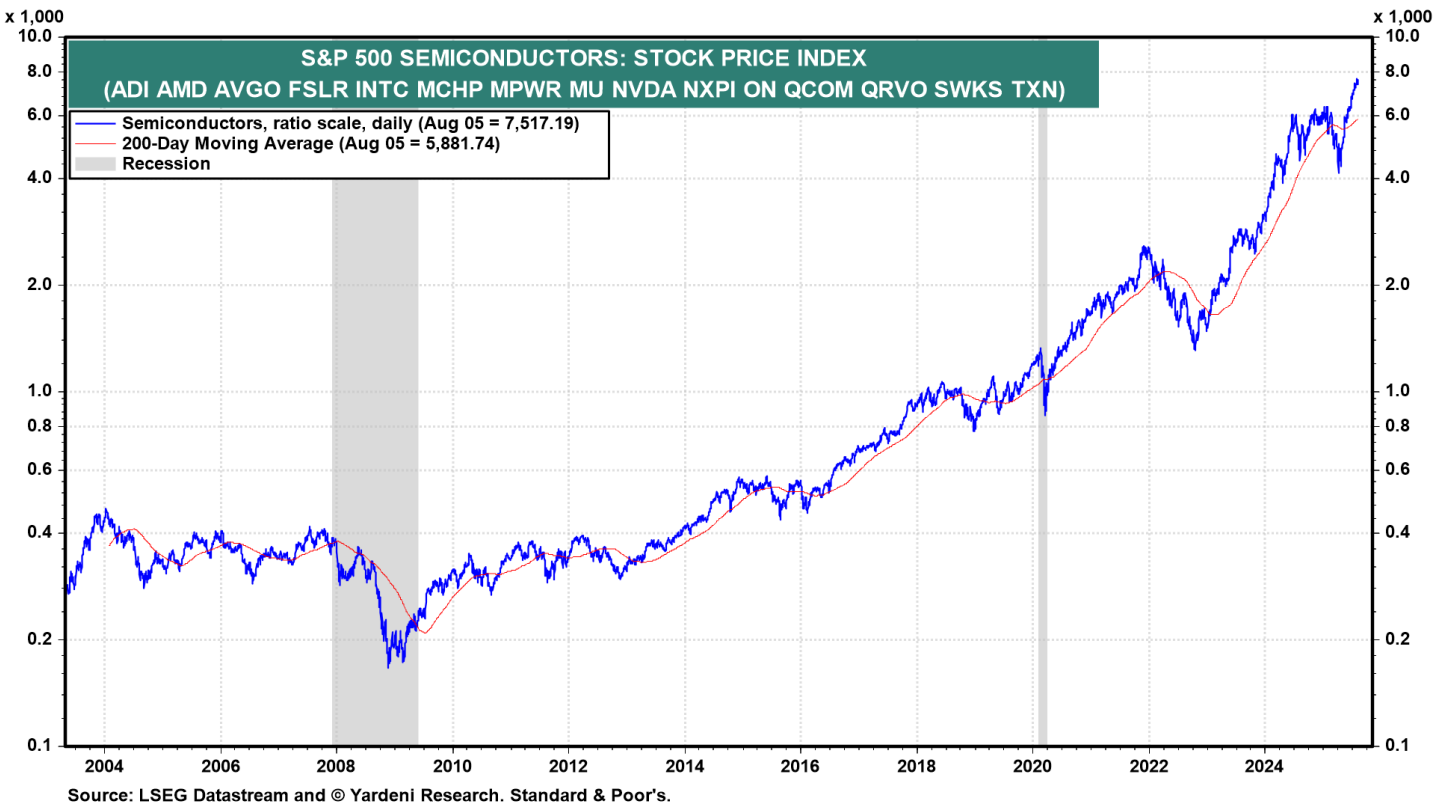


Figure 2

S&P 500 SEMICONDUCTORS' MARKET CAP* (daily, Aug 05, 2025)		
Company	Market Value (billion dollars)	Percent of Industry's Market Cap
S&P 500 Semiconductors	6,833.2	100.0
Nvidia	3,958.1	57.9
Broadcom	1,171.1	17.1
Advanced Micro Devices	240.2	3.5
Texas Instruments	141.6	2.1
Qualcomm	131.3	1.9
Micron Technology	105.0	1.5
Analog Devices	93.1	1.4
Intel	76.0	1.1
Nxp Semiconductors	41.5	0.6
Microchip Tech.	29.0	0.4
Monolithic Pwr. Sys.	28.1	0.4
First Solar	16.4	0.2
On Semiconductor	12.8	0.2
Skyworks Solutions	7.6	0.1

\* 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 3

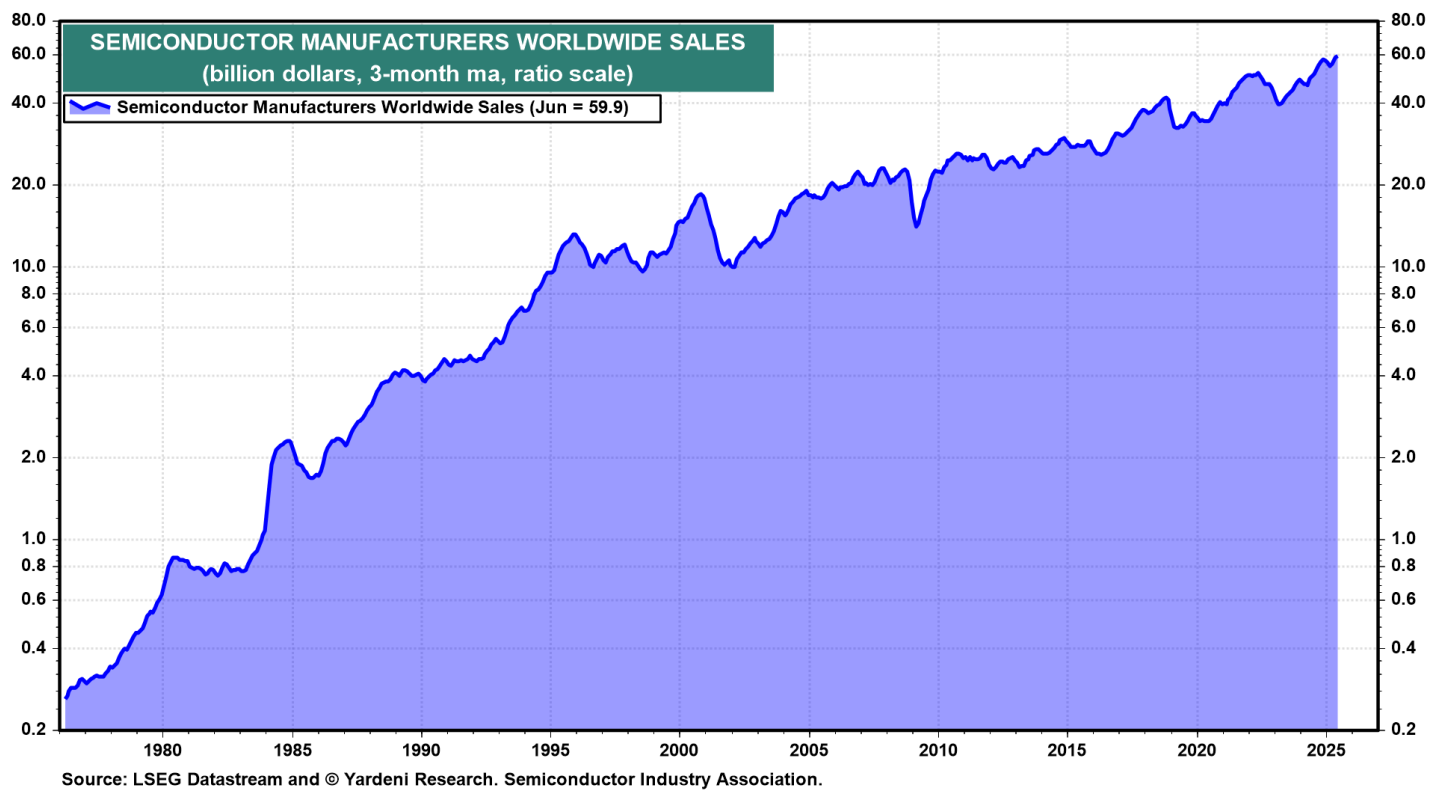


Figure 4

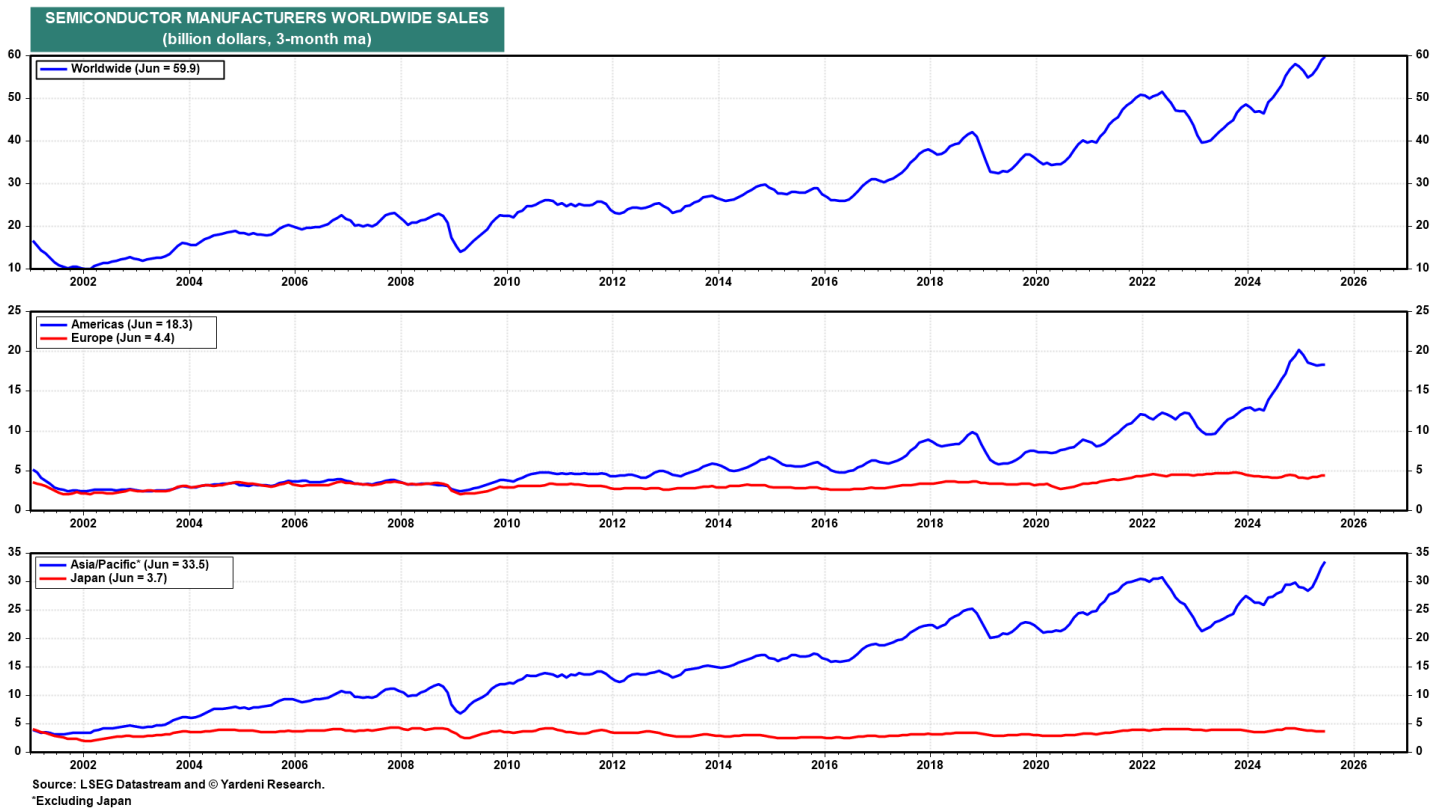


Figure 5

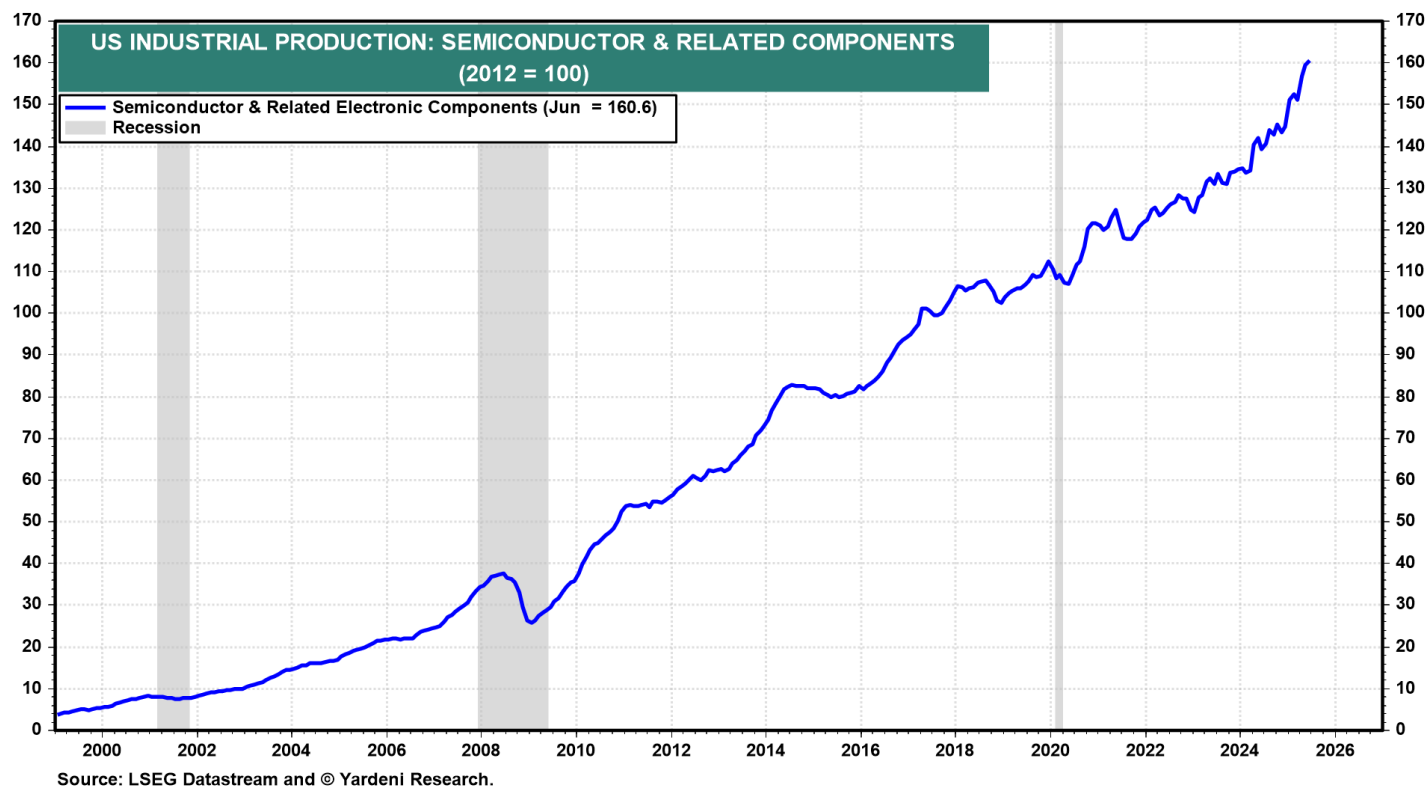


Figure 6

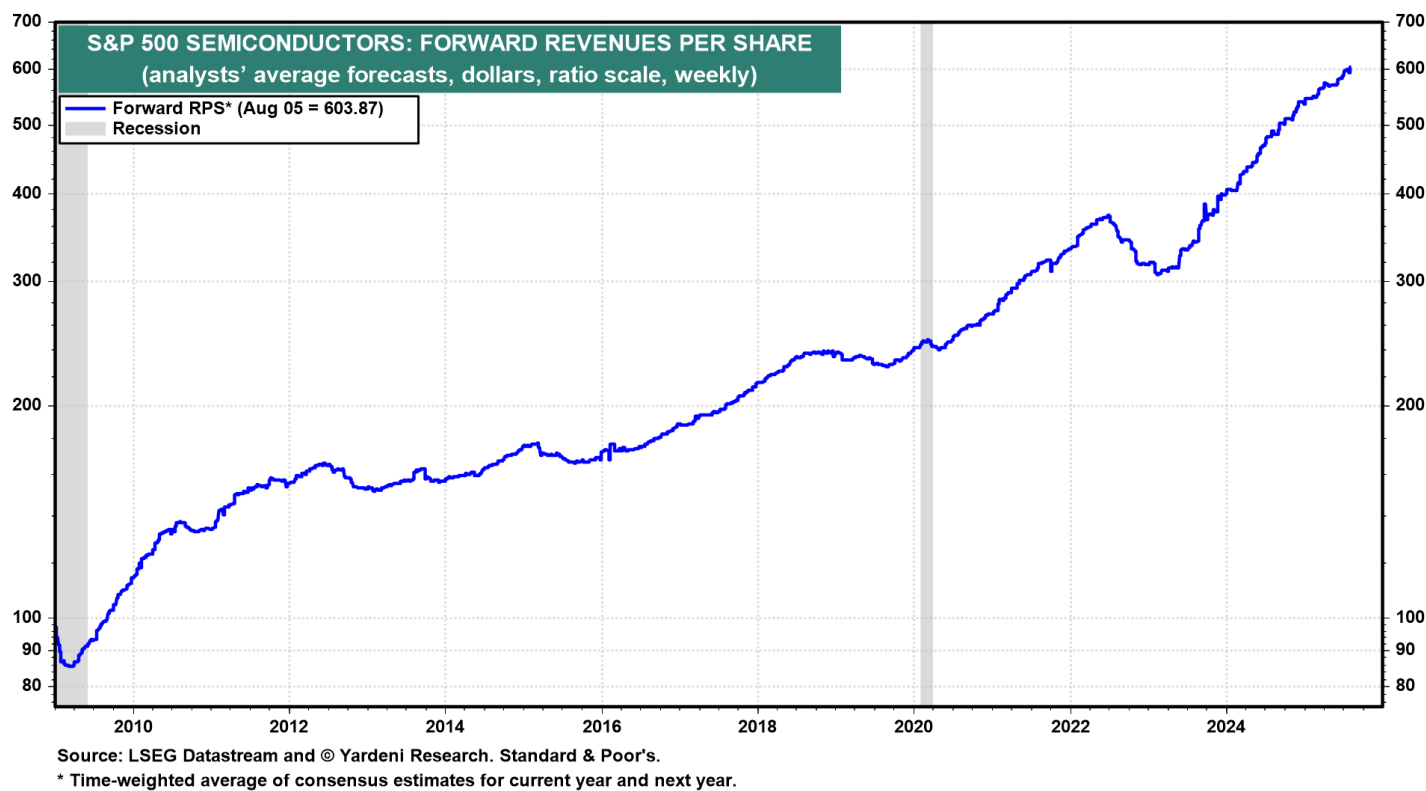


Figure 7

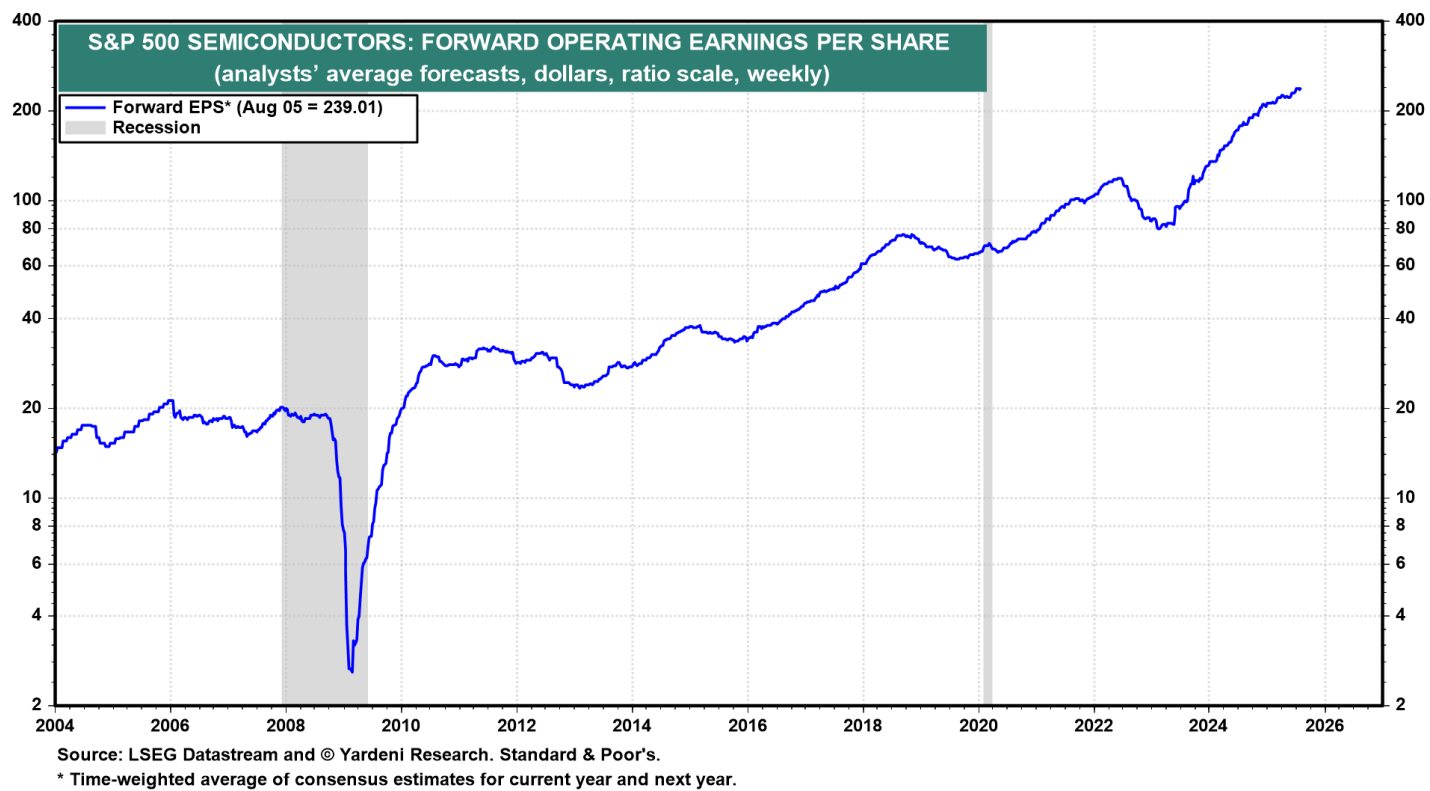


Figure 8

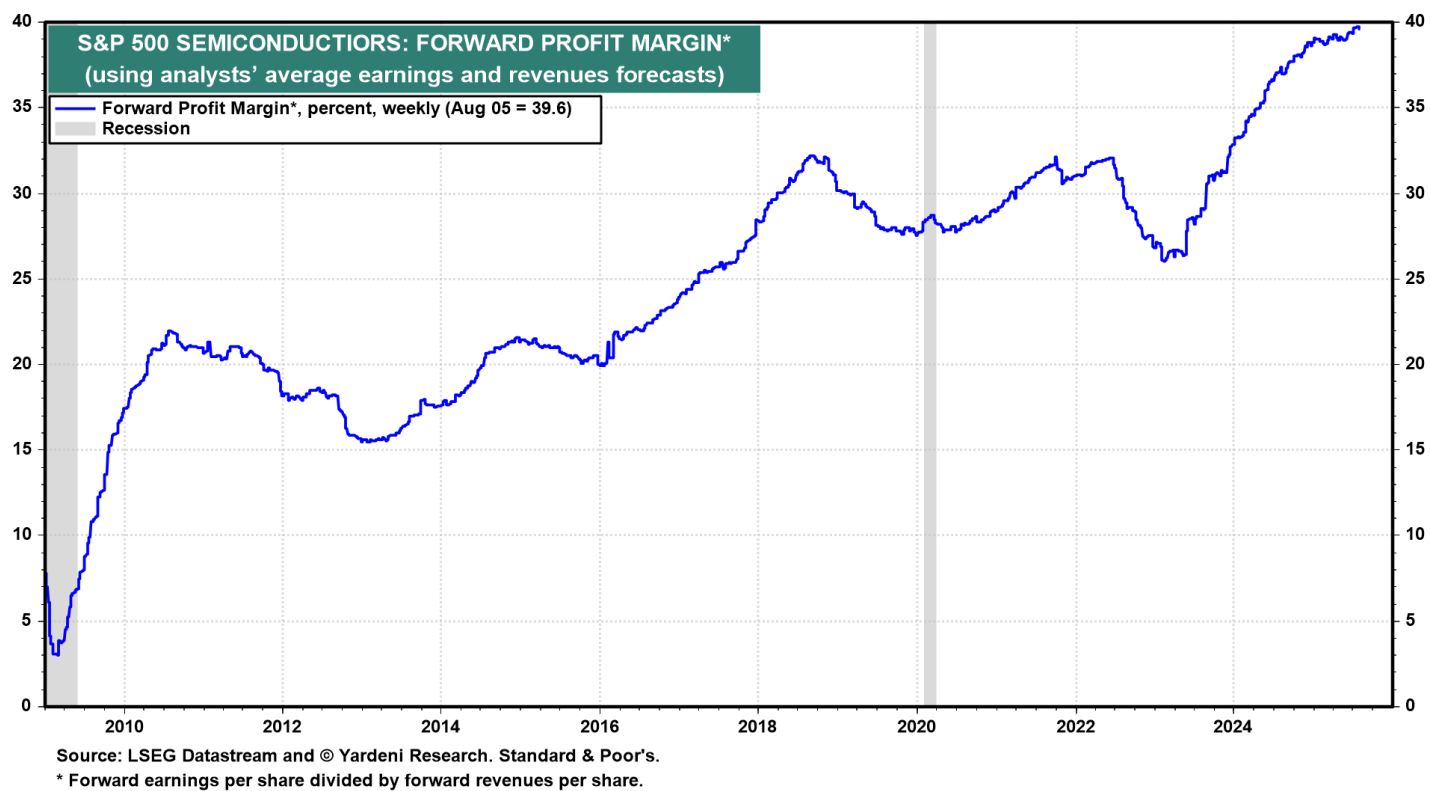


Figure 9

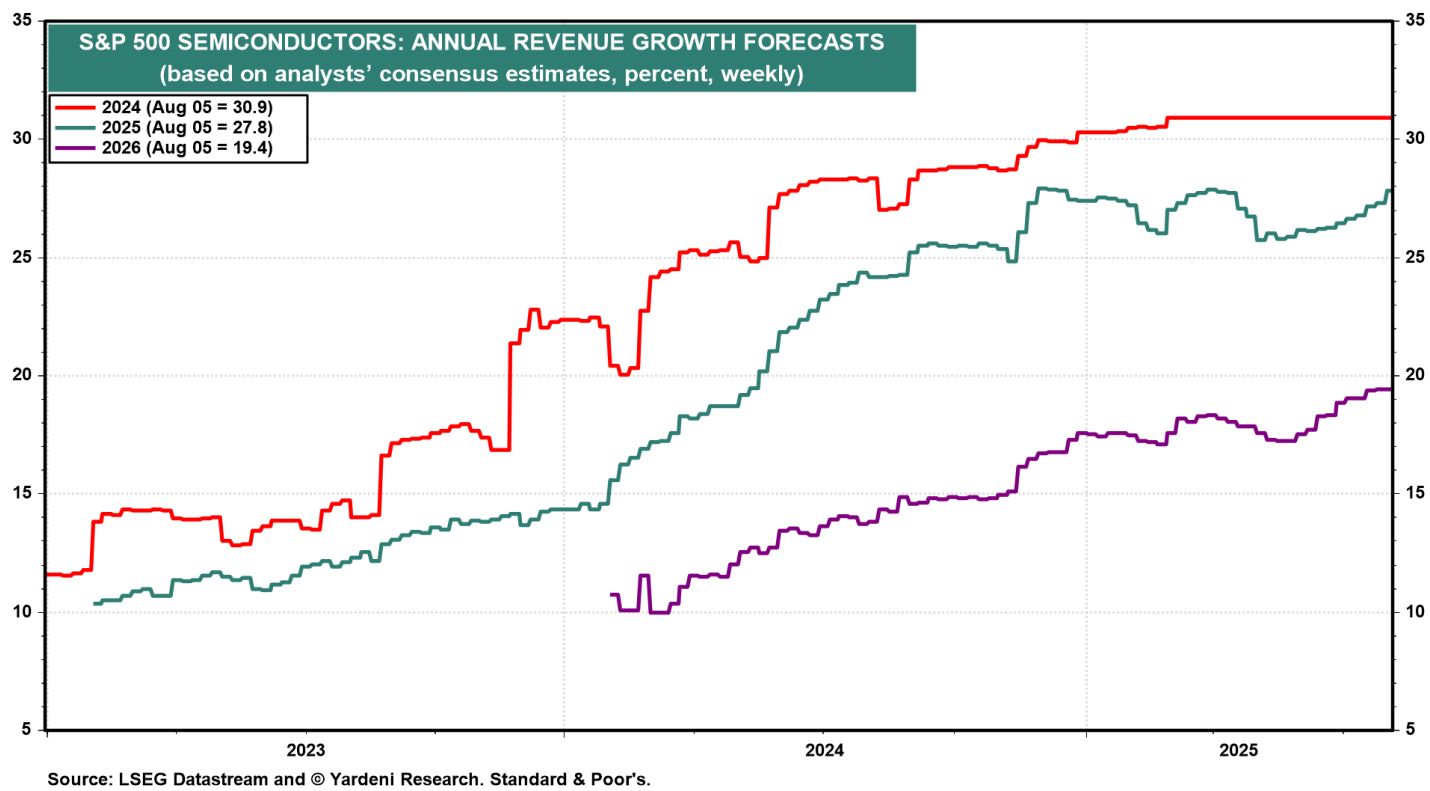


Figure 10

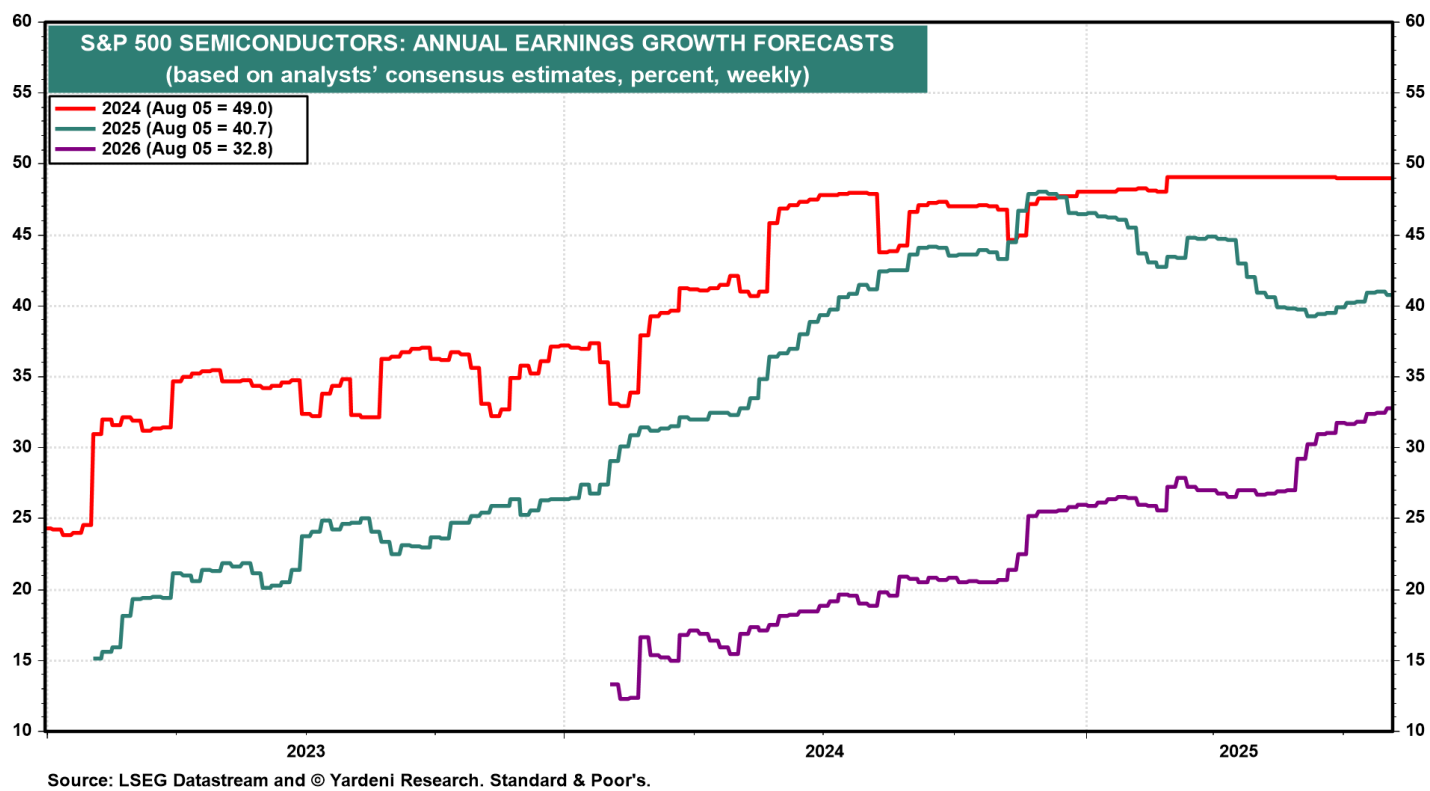
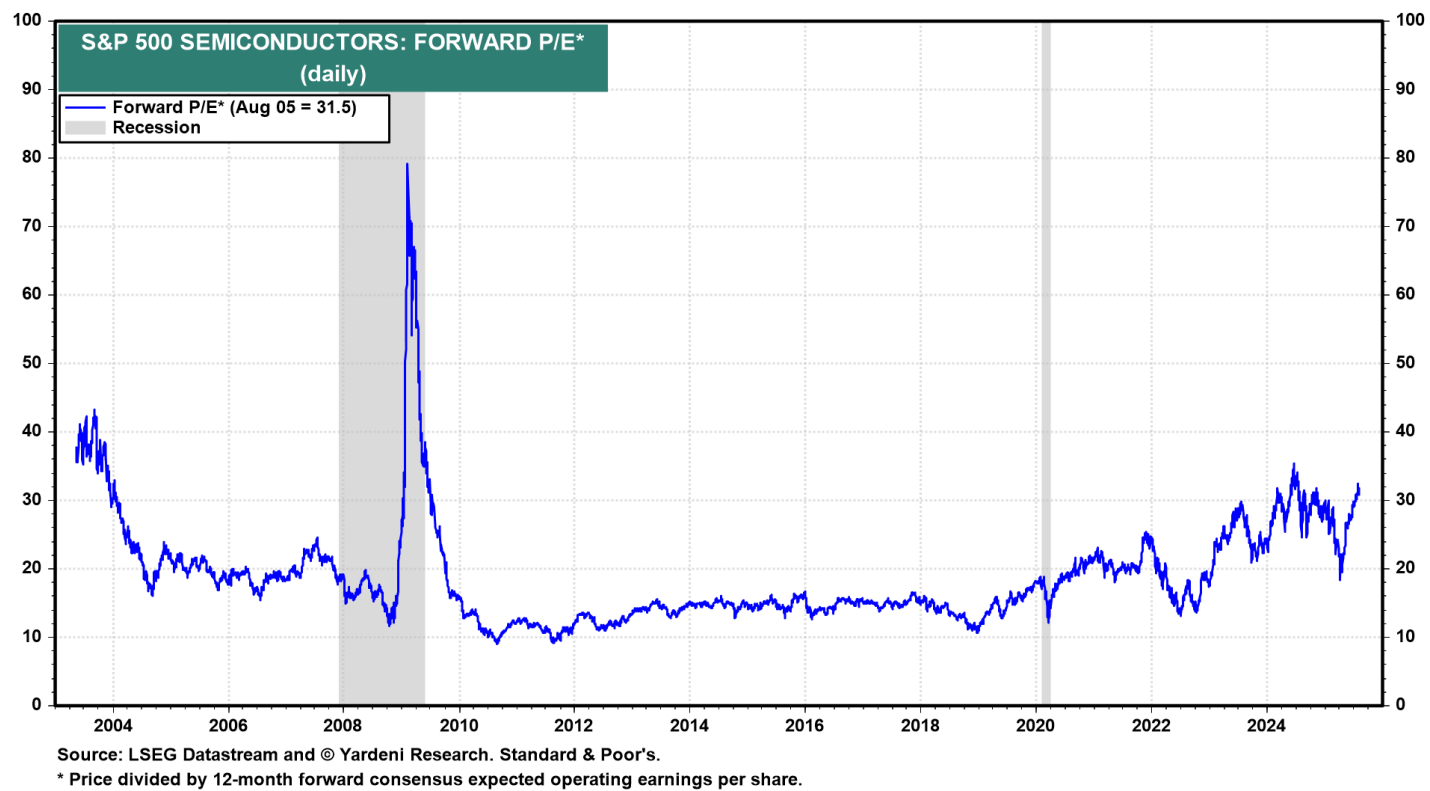


Figure 11



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