

Chart Collection for Morning Briefing

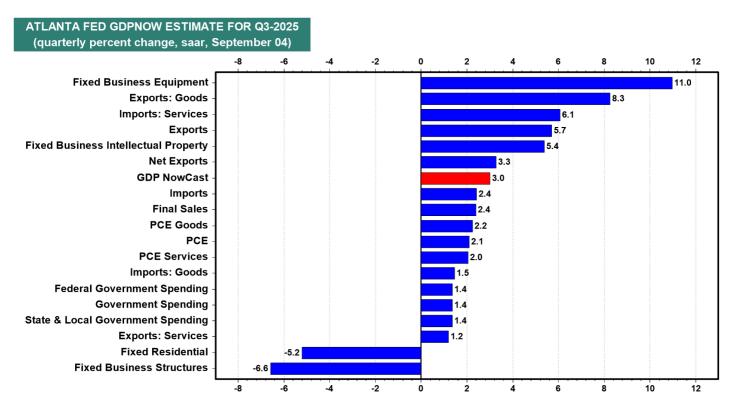
September 8, 2025

Figure 1



Source: LSEG Datastream and @ Yardeni Research. Polymarket.com.

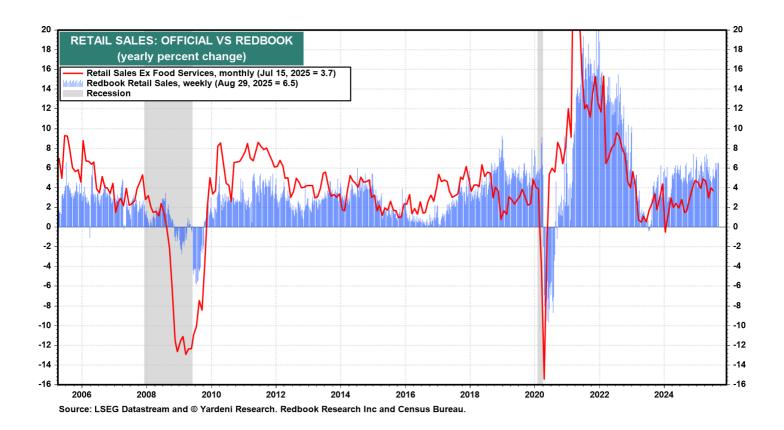
Figure 2

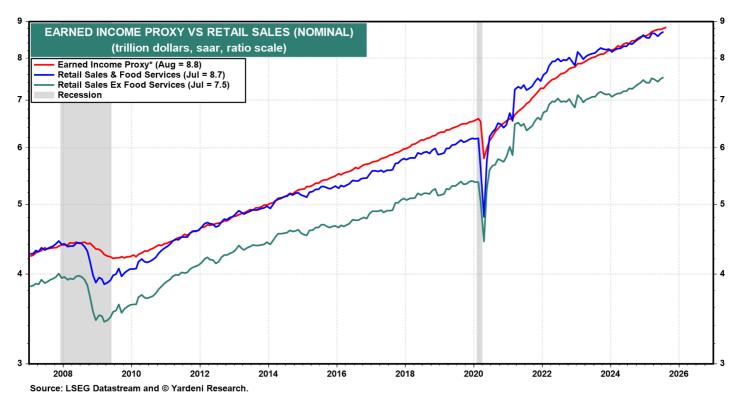


Source: LSEG Datastream and @ Yardeni Research.

^{*} Updated at 8 p.m. on business days

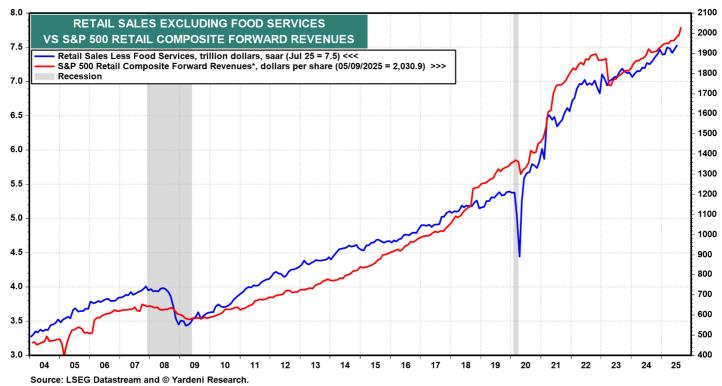
Figure 3





* Nonfarm payroll employment times average weekly hours times average hourly earnings times 52 in private industry.

Figure 5



* Time-weighted average of ananlysts' consensus estimates for current and coming years.

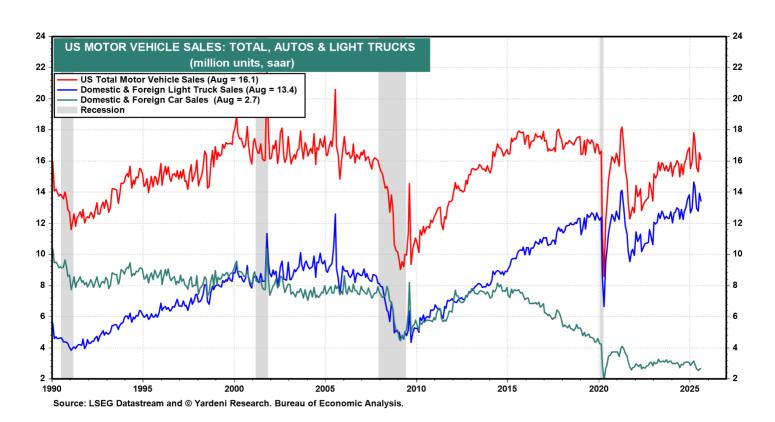
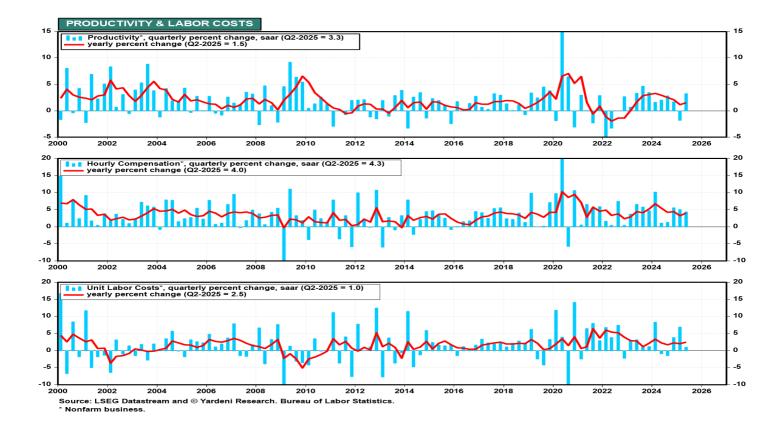


Figure 7



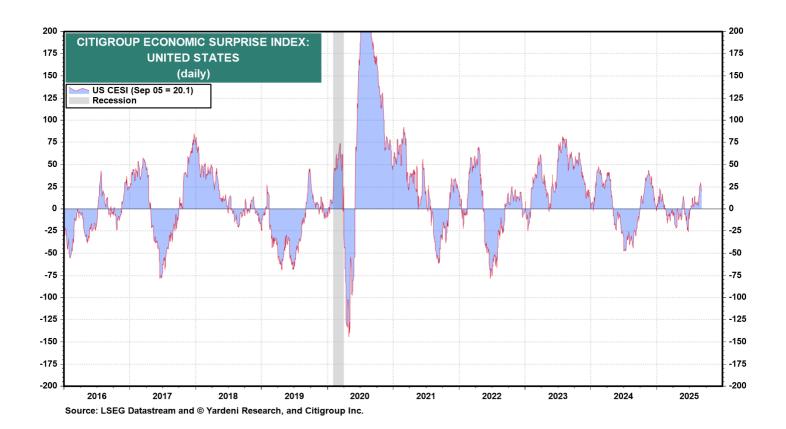
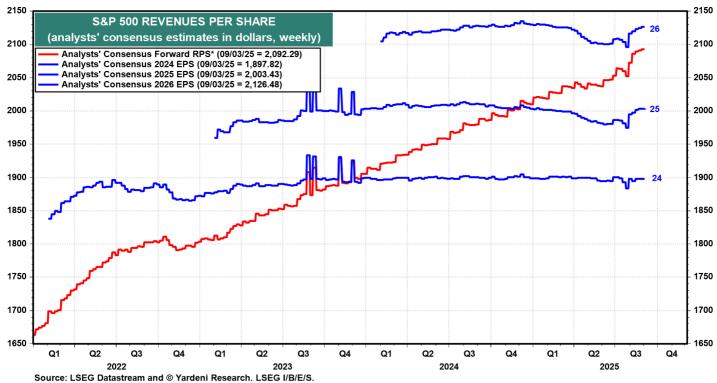


Figure 9



* Time-weighted average of analysts' consensus estimates for current and coming year.

Figure 10

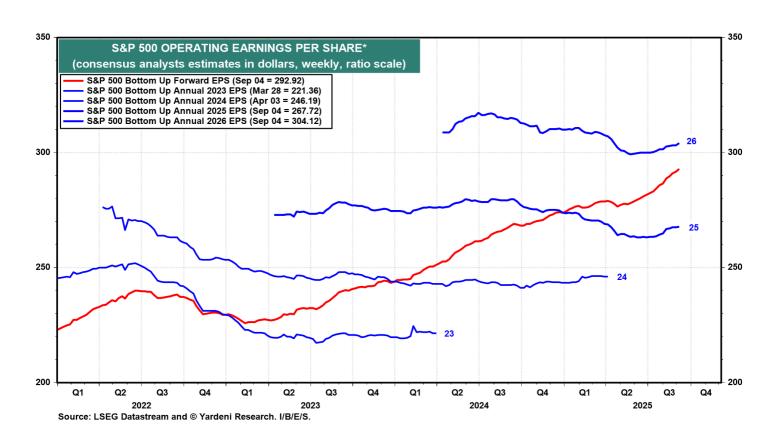
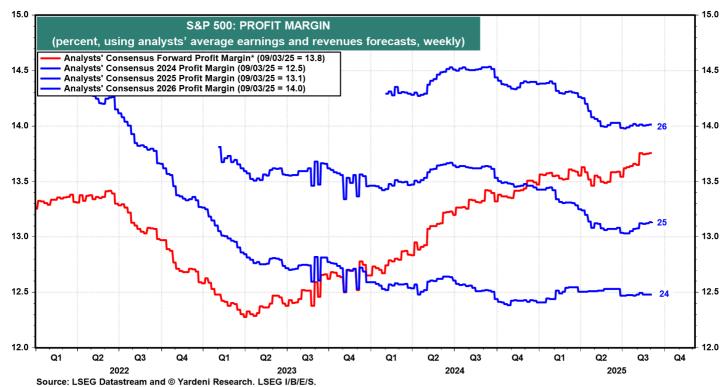
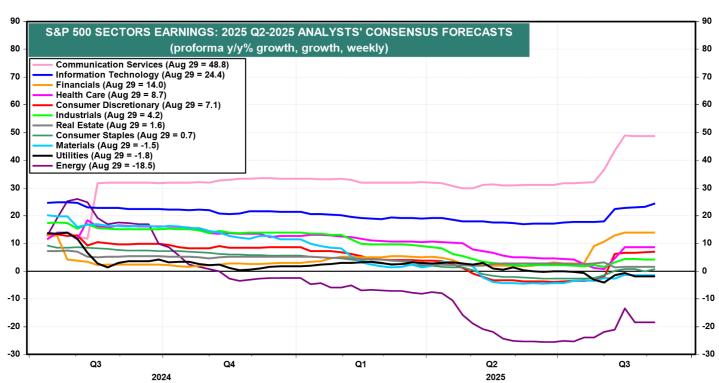


Figure 11



* Forward earnings per share divided by forward revenues per share.

Figure 12



Source: LSEG Datastream and @ Yardeni Research. LSEG I/B/E/S.

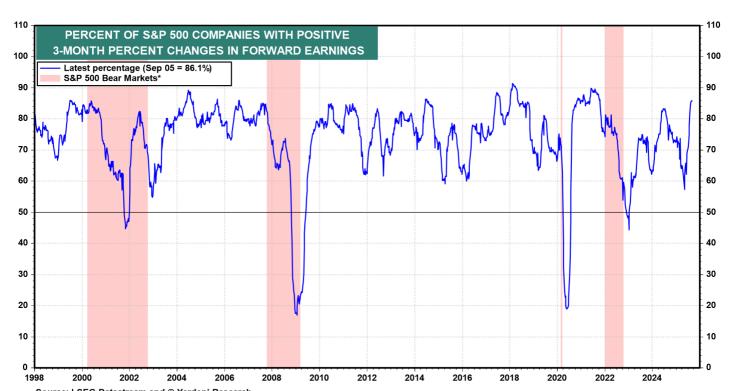
^{*} Growth rates are proforma, assumes current index members were in the index a year earlier (apples-to-apples comparisons).

Figure 13



* Shaded red areas are S&P 500 bear market declines of 20% or more.

Figure 14



Source: LSEG Datastream and © Yardeni Research.

* Shaded red areas are S&P 500 bear market declines of 20% or more.

Figure 15

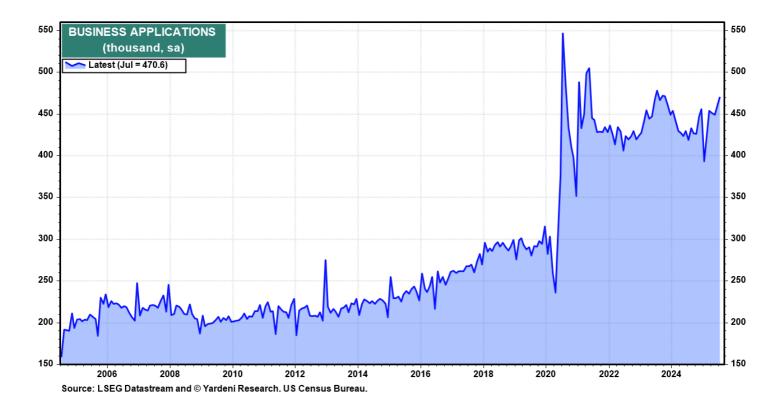


Figure 16

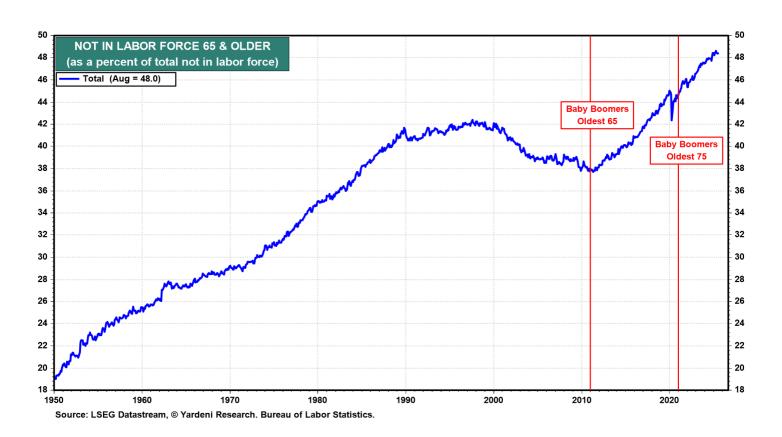
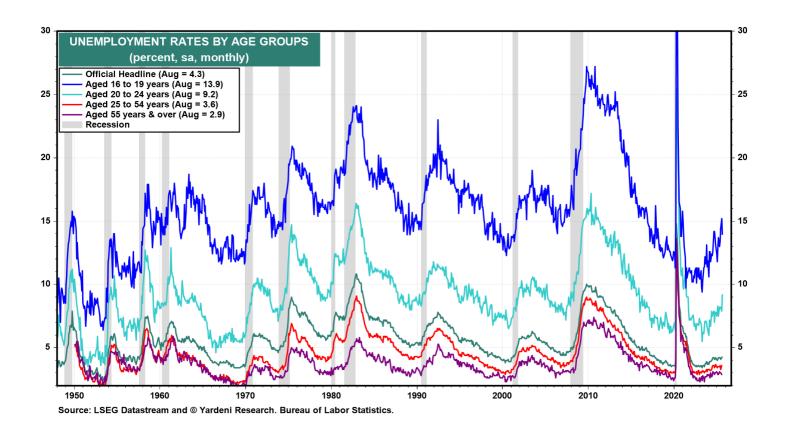


Figure 17



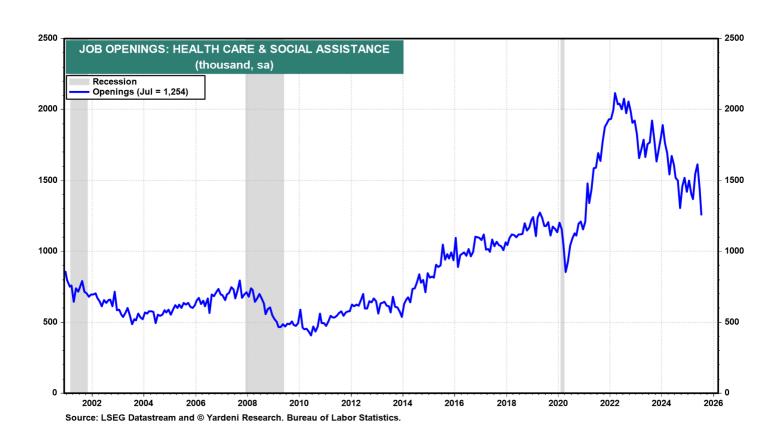
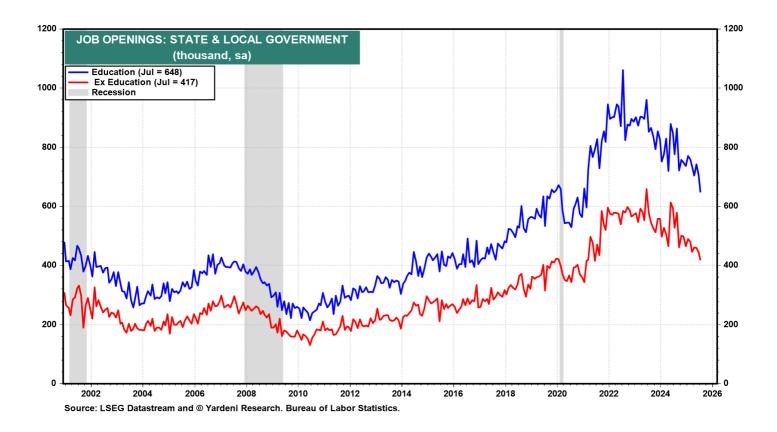


Figure 19



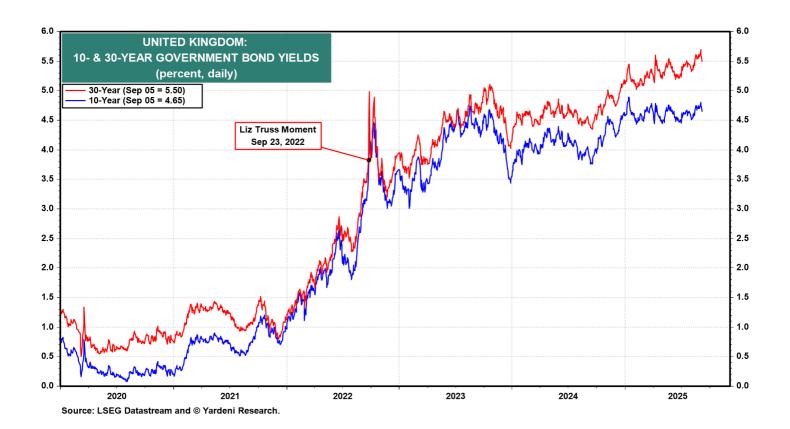


Figure 21

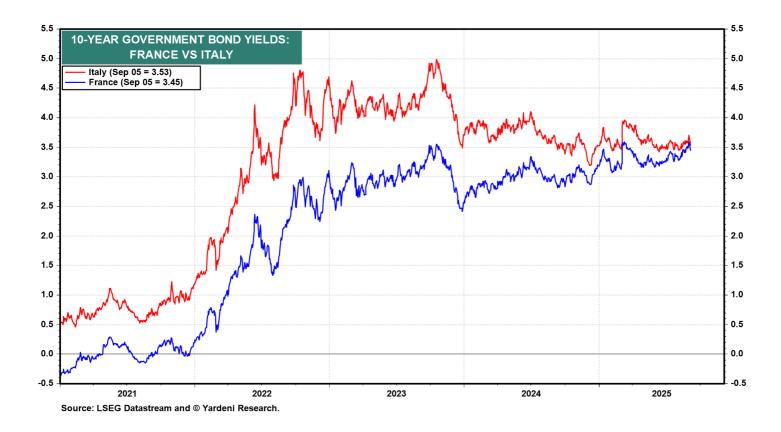
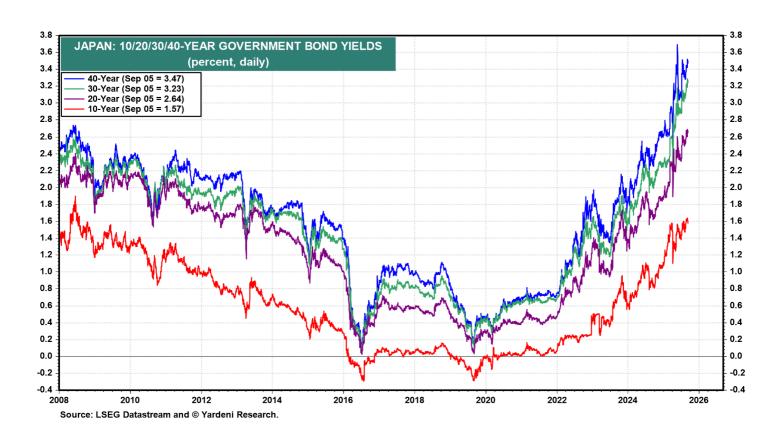


Figure 22



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