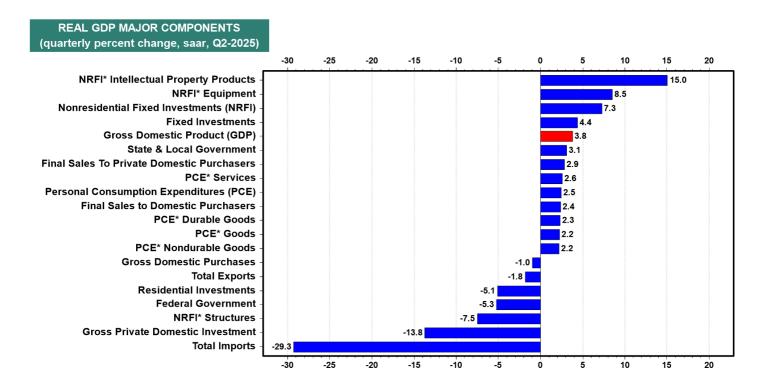


Chart Collection for Morning Briefing

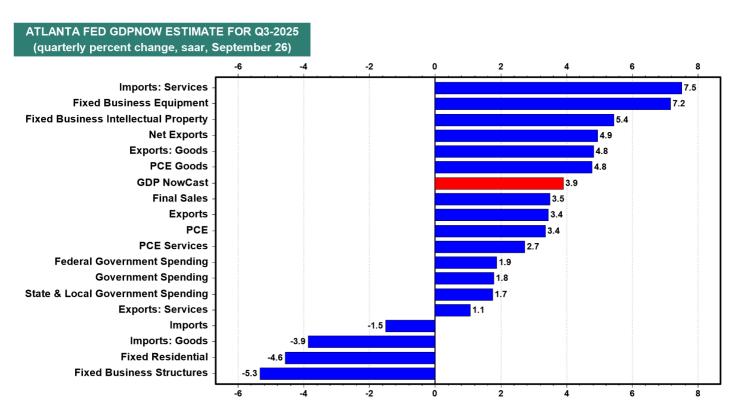
September 29, 2025

Figure 1



Source: LSEG Datastream and @ Yardeni Research. Bureau of Economic Analysis.

Figure 2



Source: LSEG Datastream and @ Yardeni Research.

-- ^

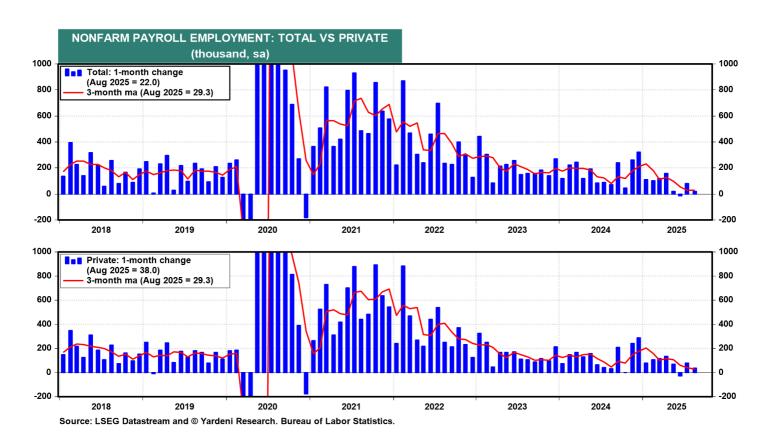
^{*} NRFI = nonresidential fixed investment. PCE = personal consumption expenditures.

Figure 3



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

Figure 4



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

Figure 5

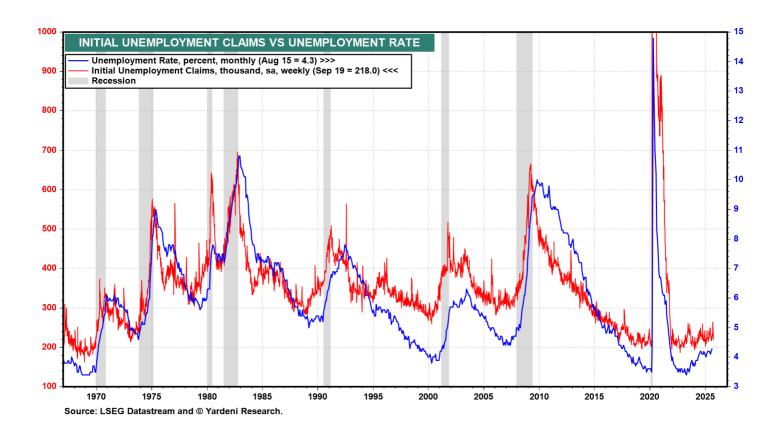
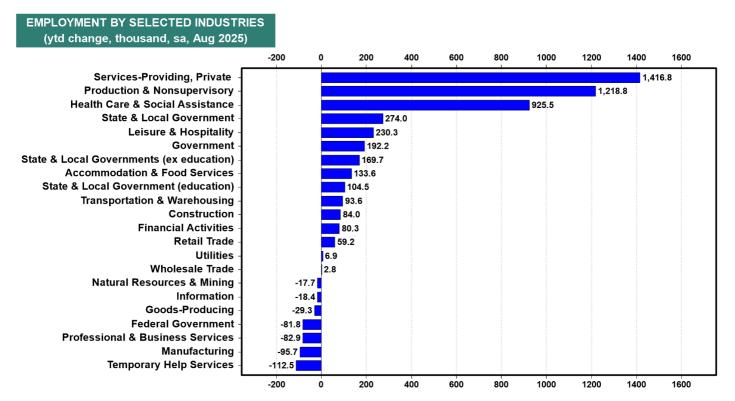


Figure 6



Source: LSEG Datastream and @ Yardeni Research, and Bureau of Labor Statistics.

Figure 7

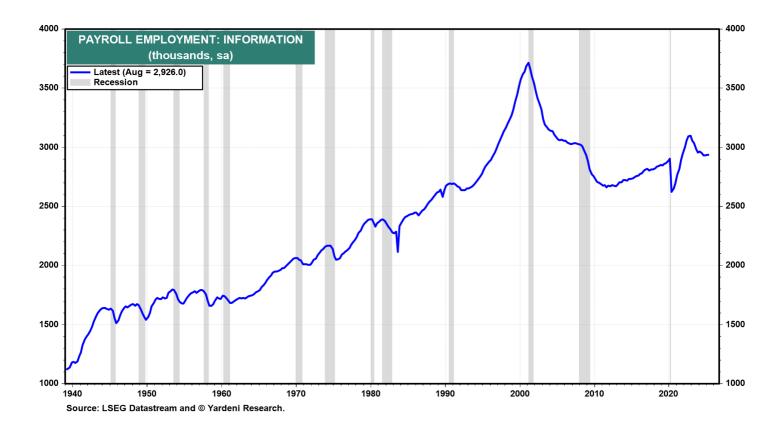


Figure 8

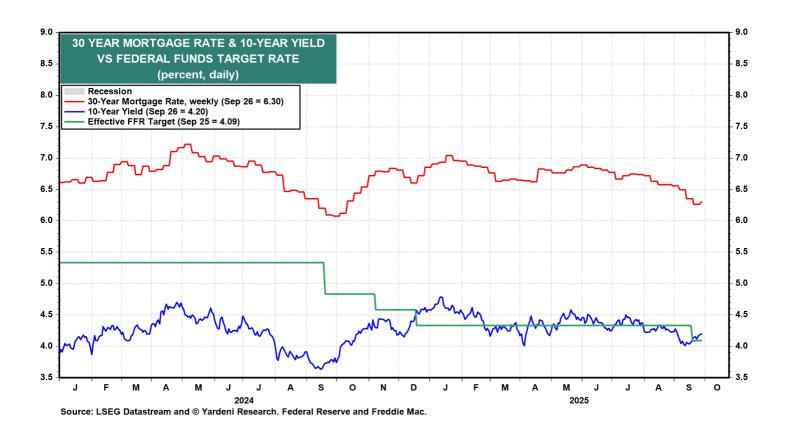


Figure 9

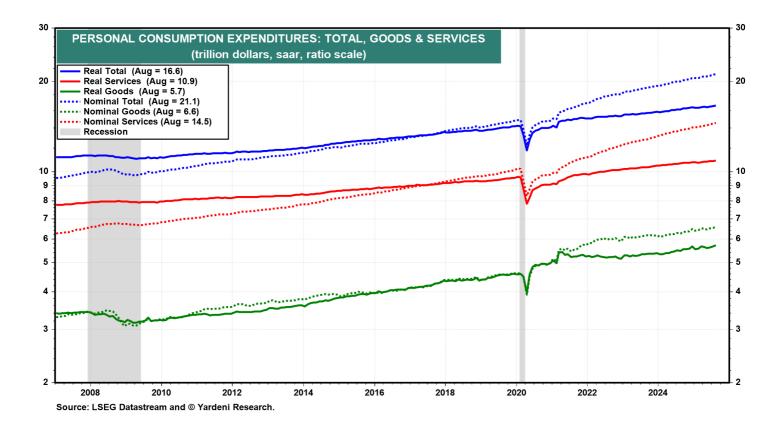
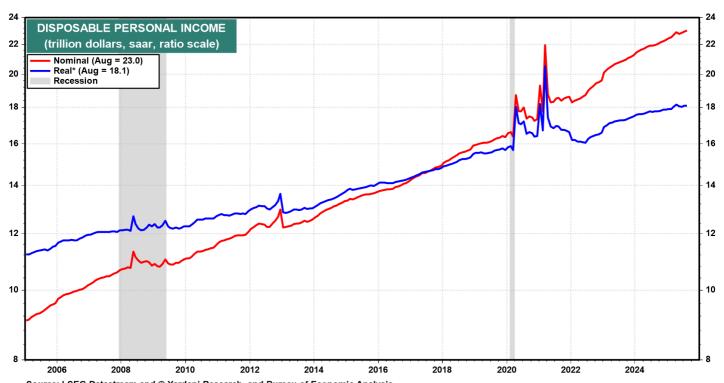


Figure 10



Source: LSEG Datastream and @ Yardeni Research, and Bureau of Economic Analysis.

^{*} Nominal disposable income divided by headline personal consumption expenditures deflator.

Figure 11

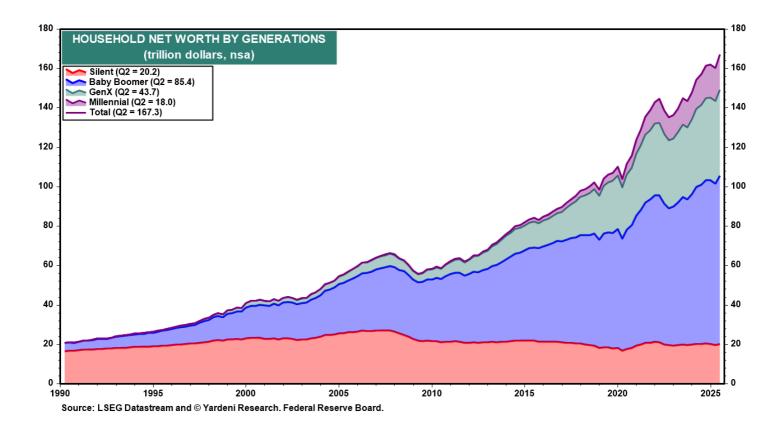
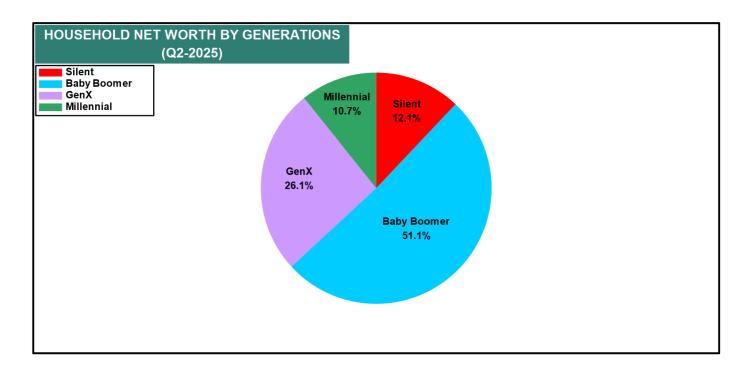


Figure 12



Source: LSEG Datastream and © Yardeni Research. Federal Reserve.

Figure 13

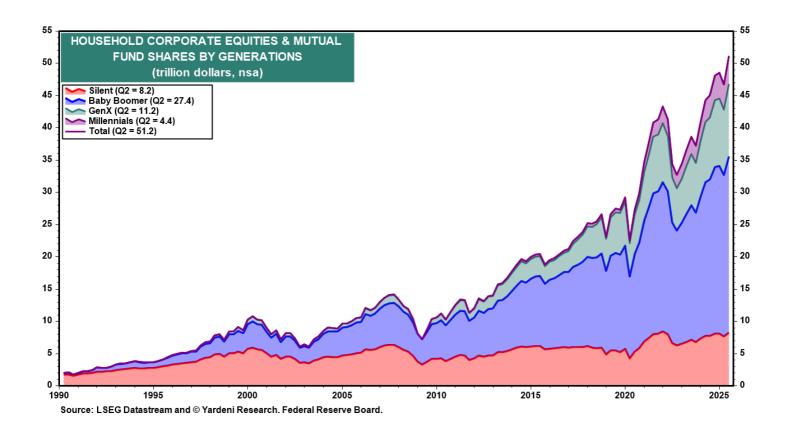
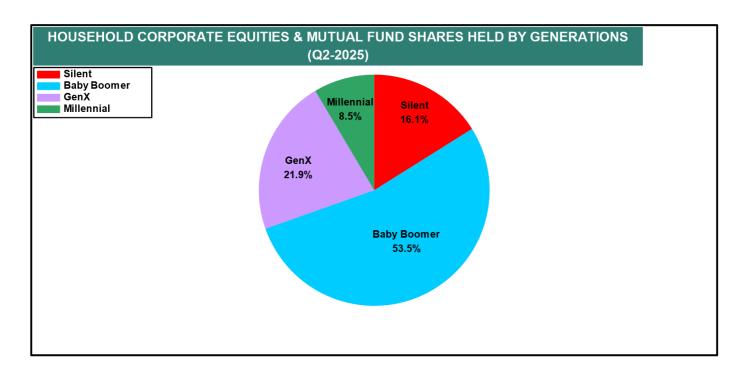
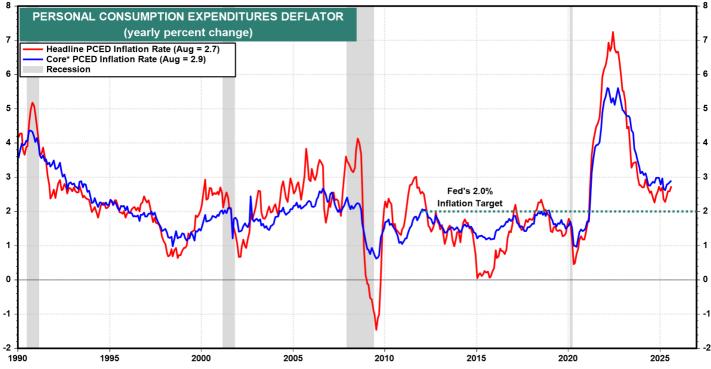


Figure 14



Source: LSEG Datastream and © Yardeni Research. Federal Reserve.

Figure 15



Source: LSEG Datastream and © Yardeni Research, and Bureau of Economic Analysis.

*Excluding food & energy prices.

Figure 16

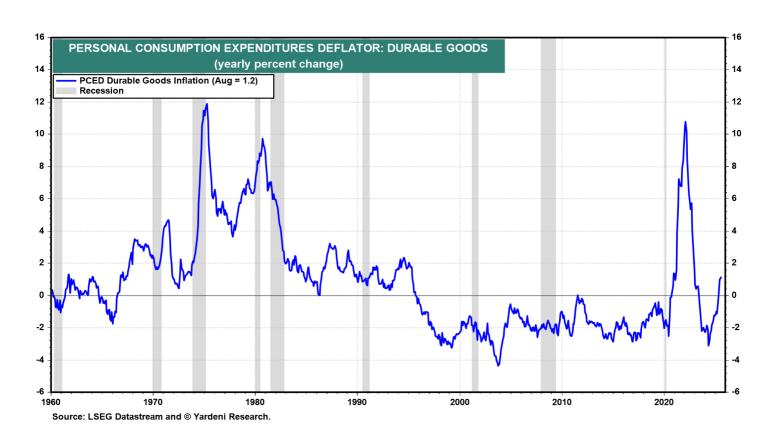


Figure 17

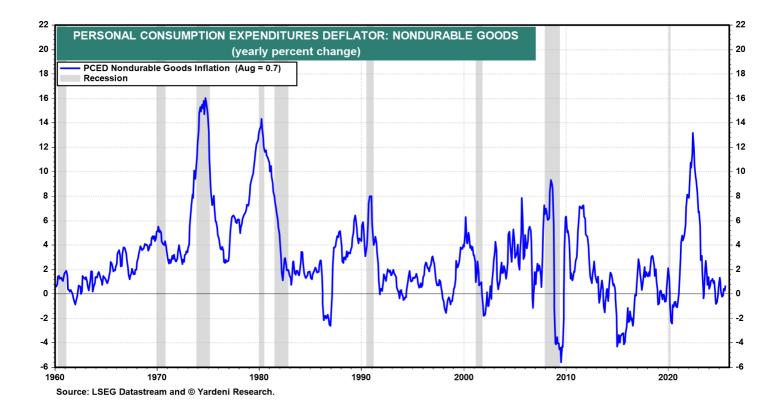


Figure 18

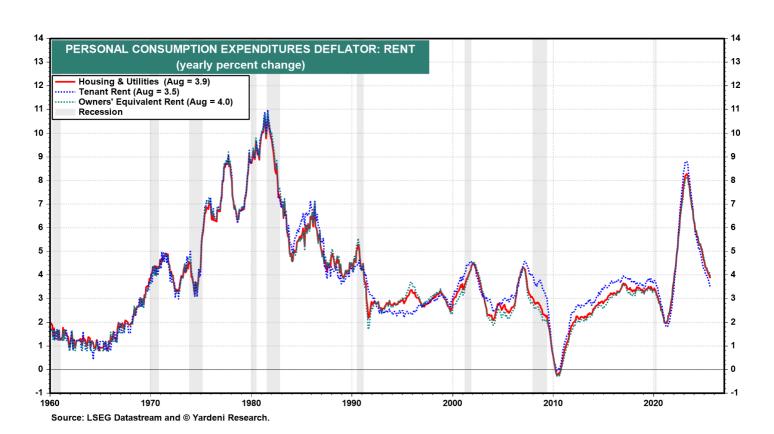
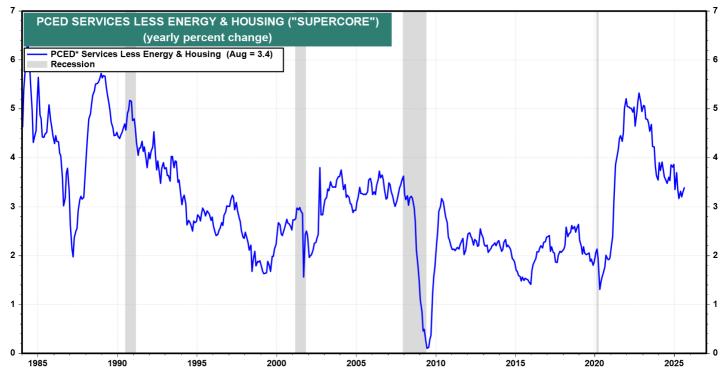


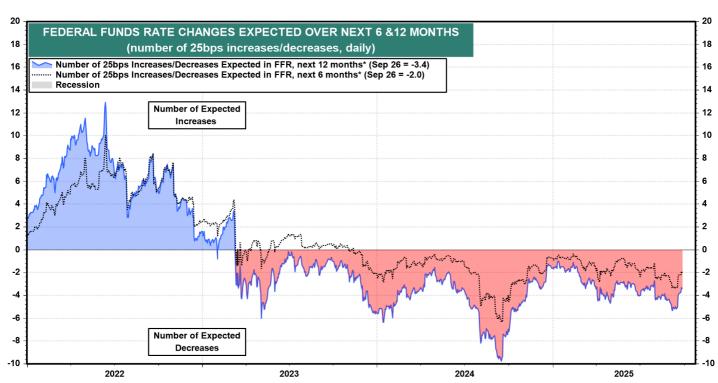
Figure 19



Source: LSEG Datastream and @ Yardeni Research.

* Personal consumption expenditures deflator.

Figure 20



Source: LSEG Datastream and @ Yardeni Research. Federal Reserve and Chicago Board of Trade.

^{* 6-}month and12-month futures FFR minus FFR all divided by 25.

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