

**Yardeni
Research**

Chart Collection for Morning Briefing

October 9, 2025

Figure 1

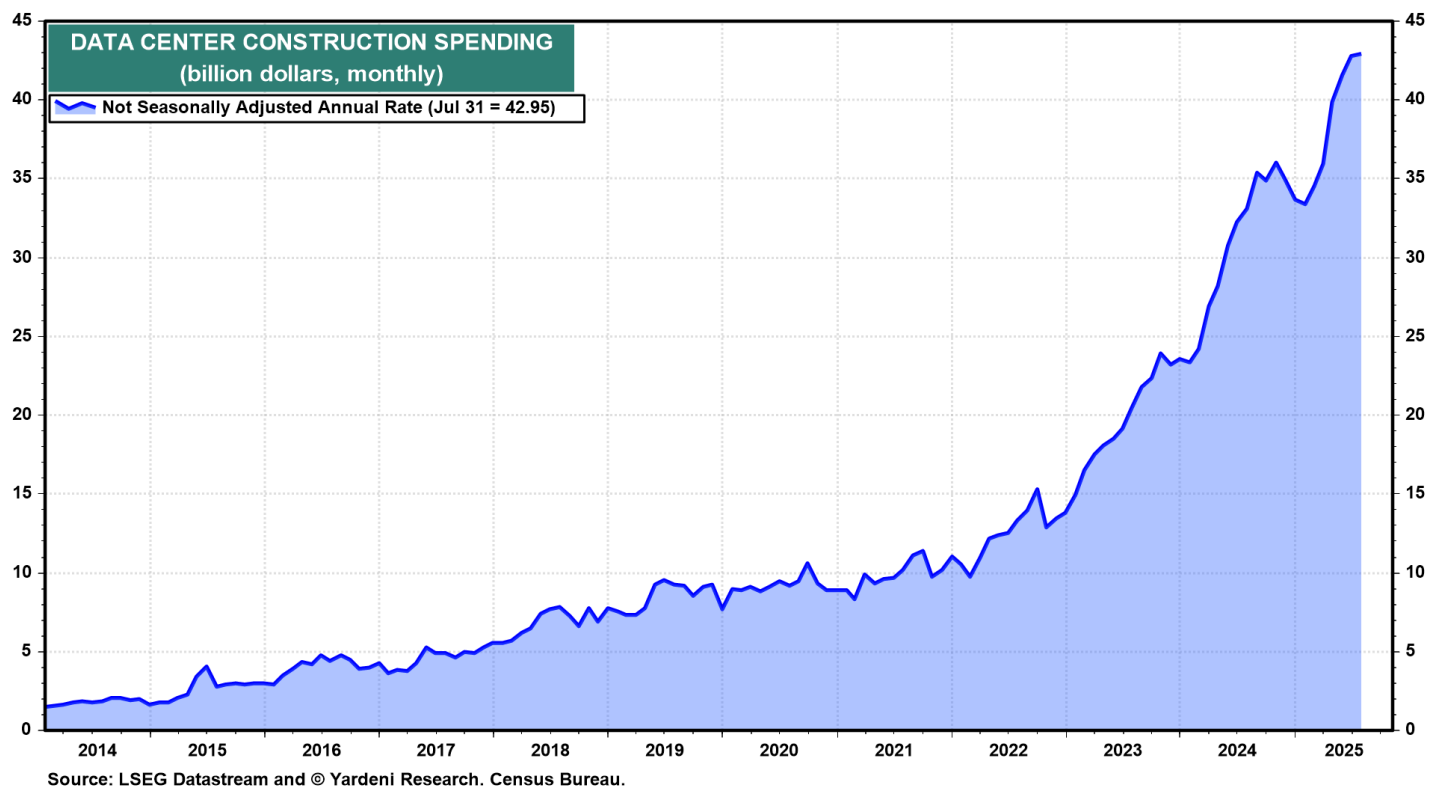


Figure 2

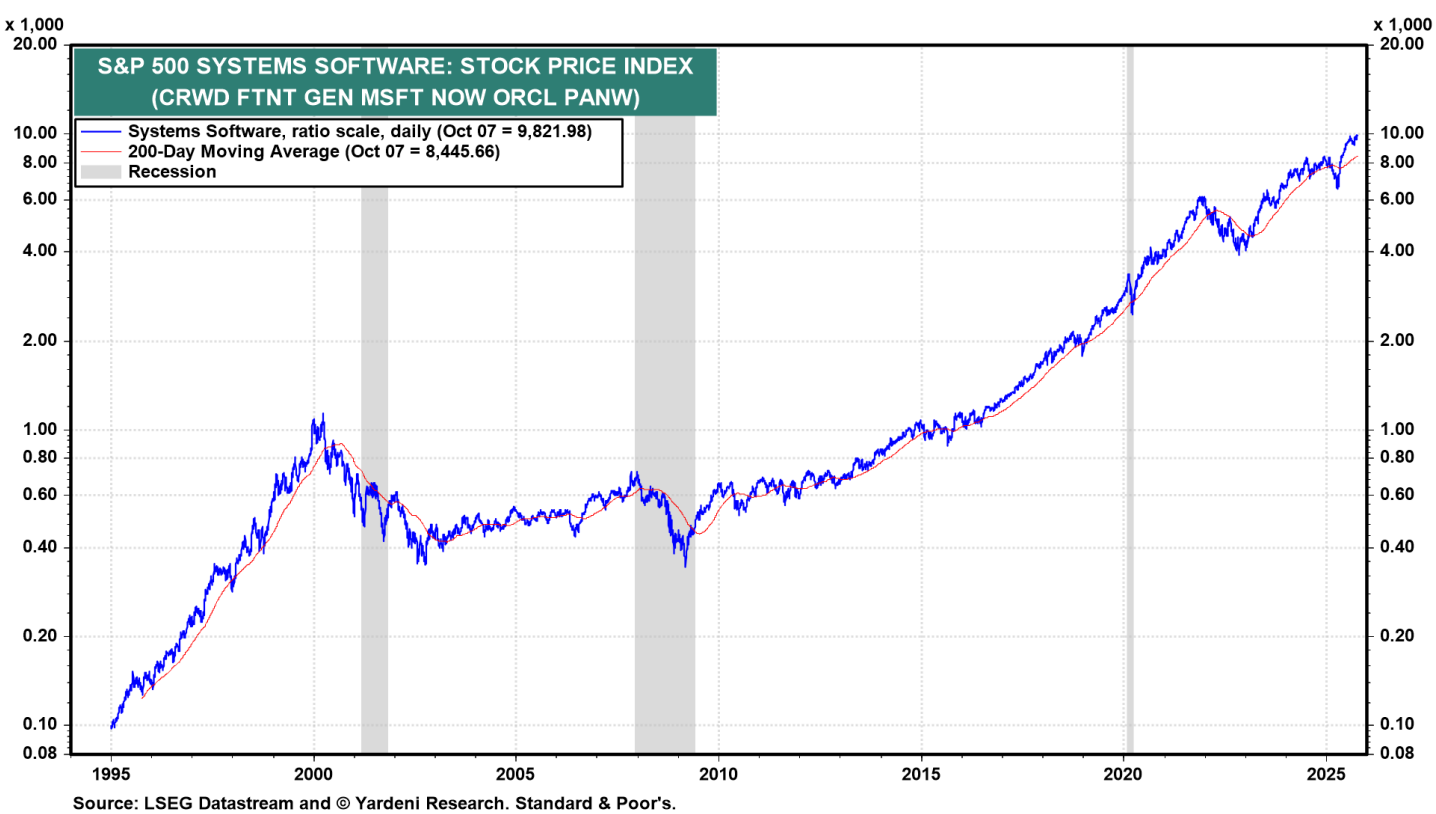


Figure 3

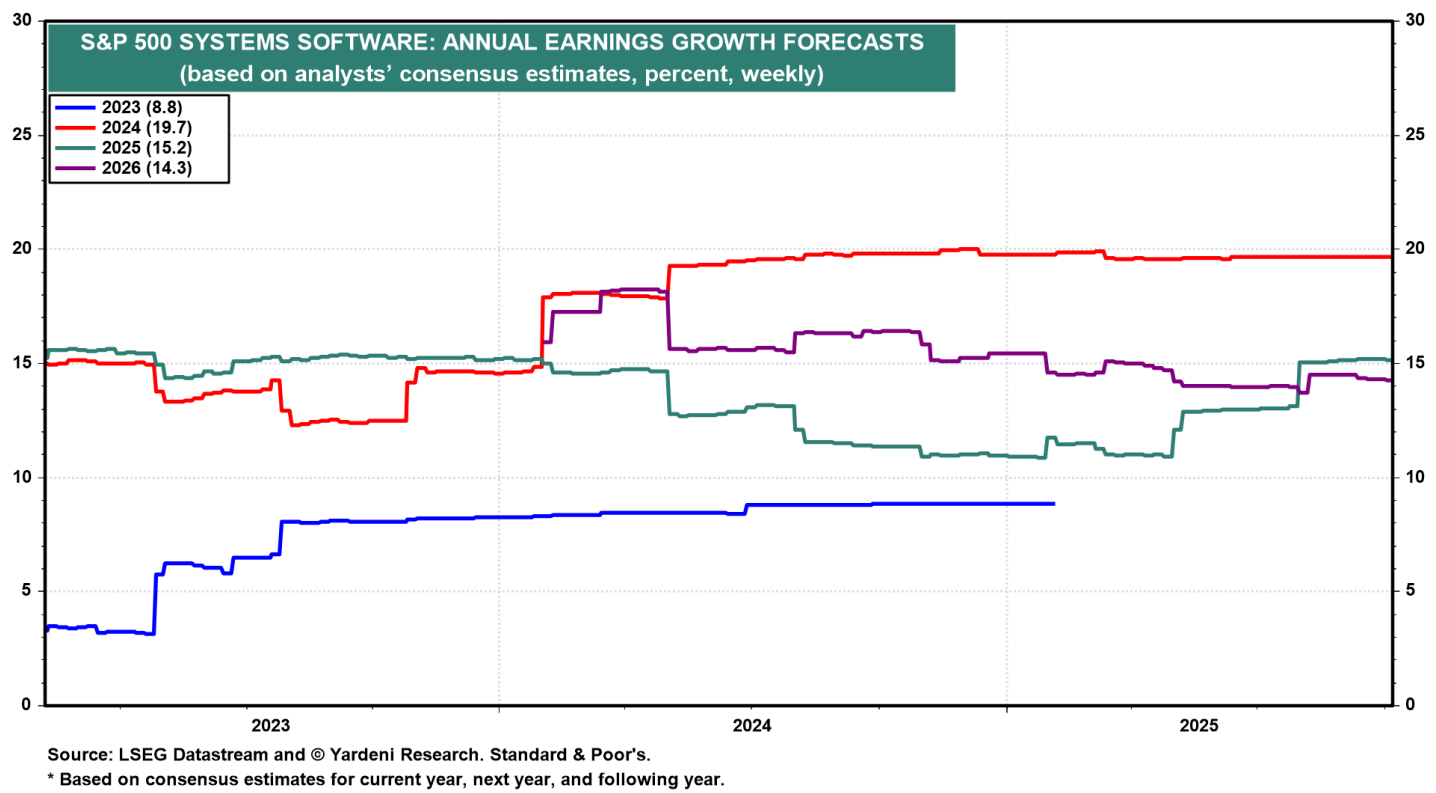


Figure 4

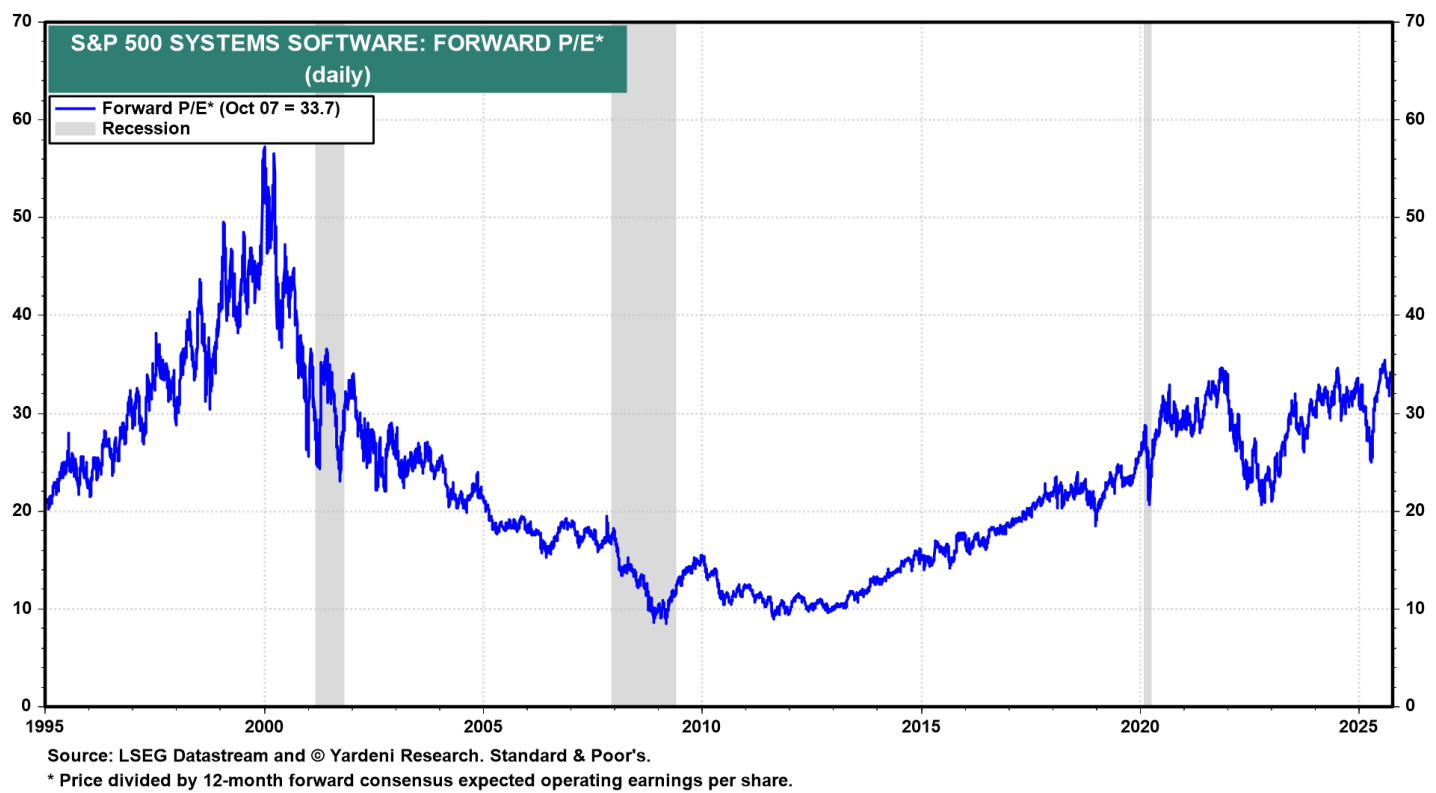


Figure 5

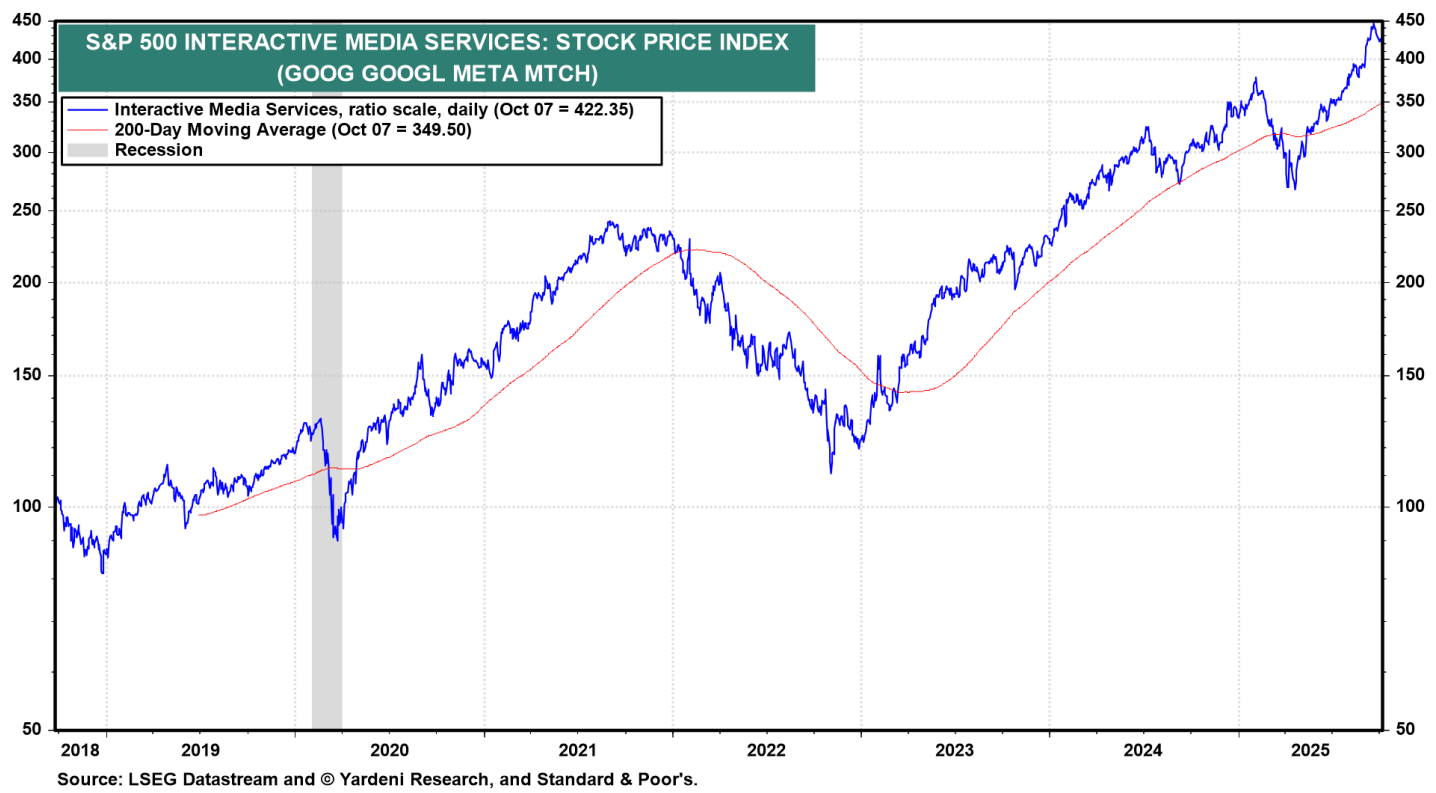


Figure 6

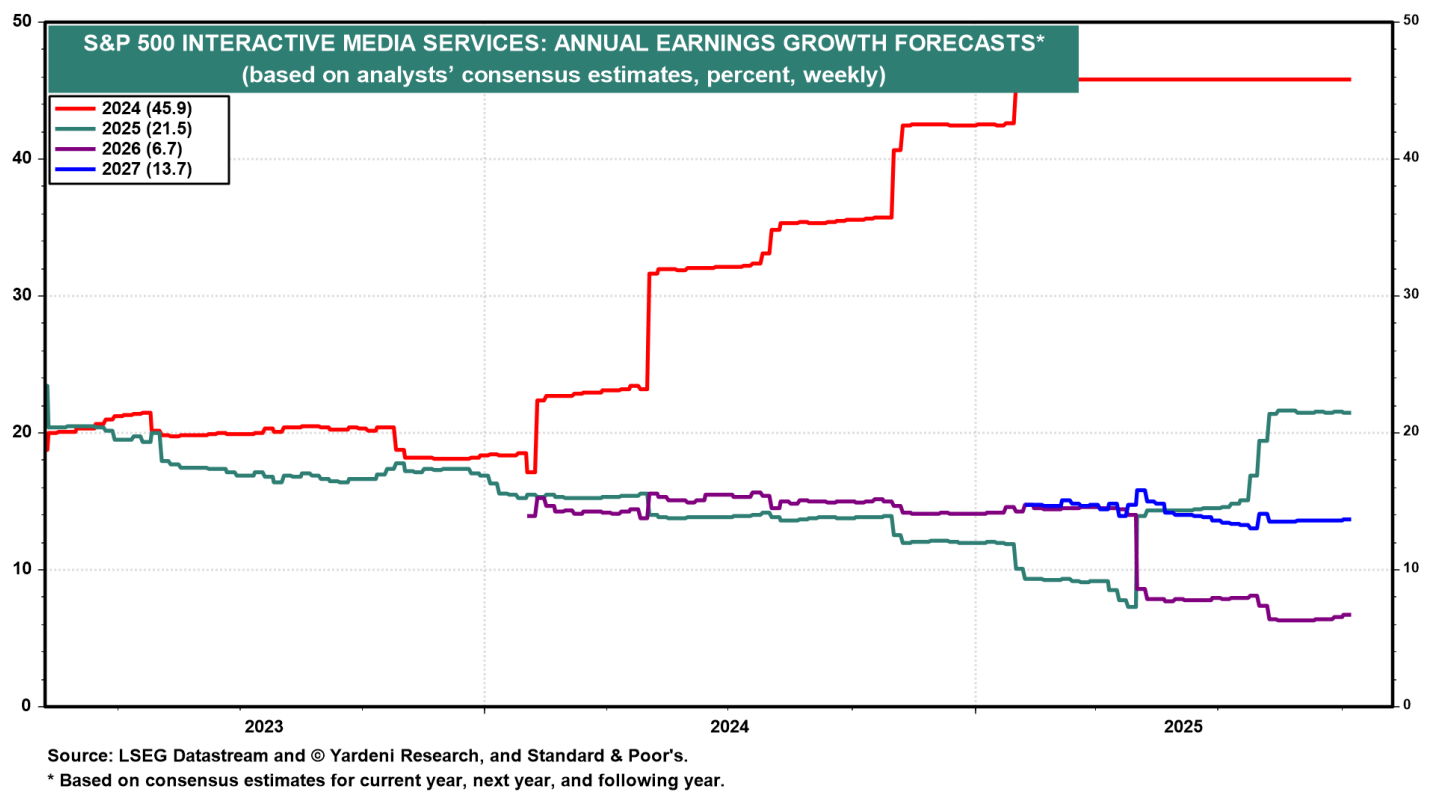


Figure 7

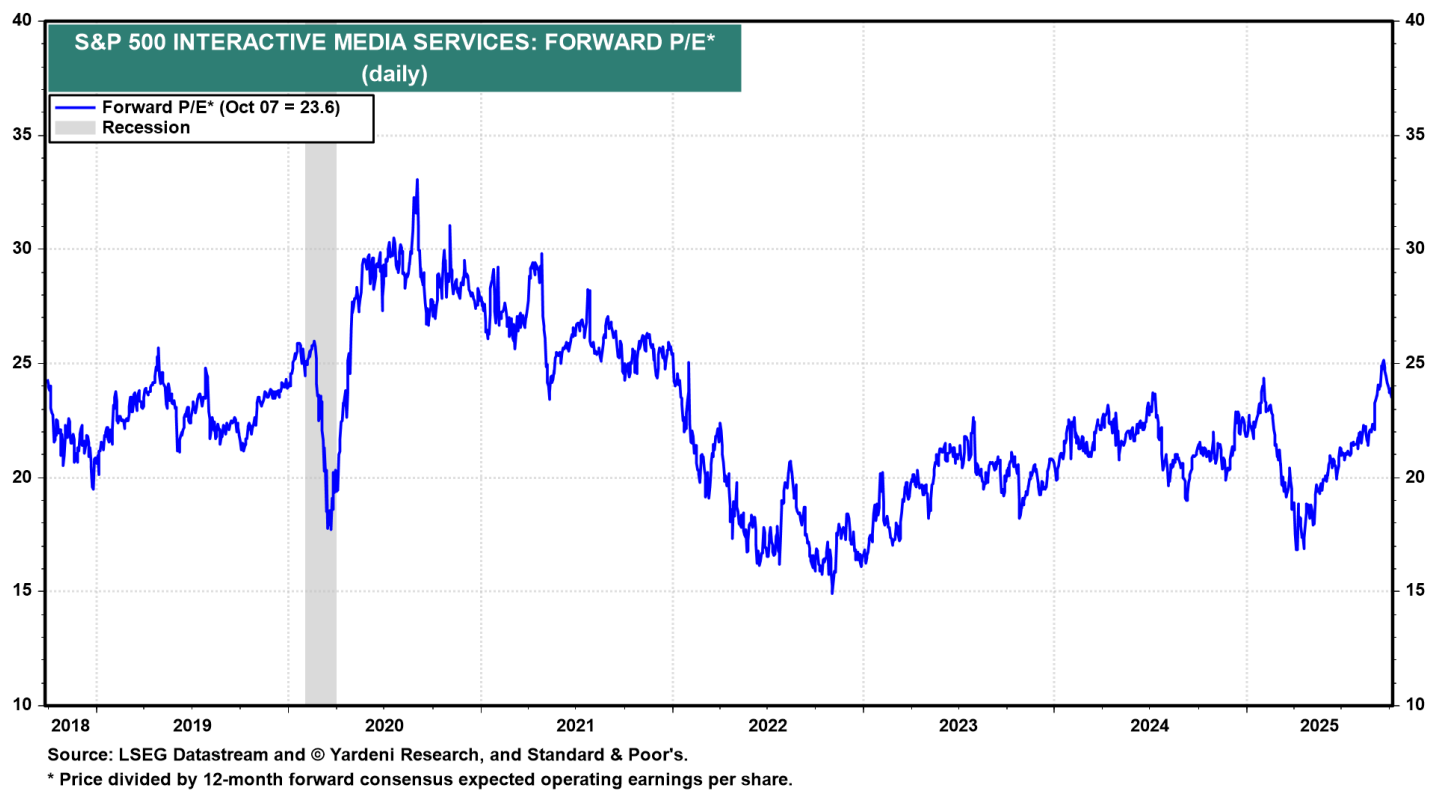


Figure 8

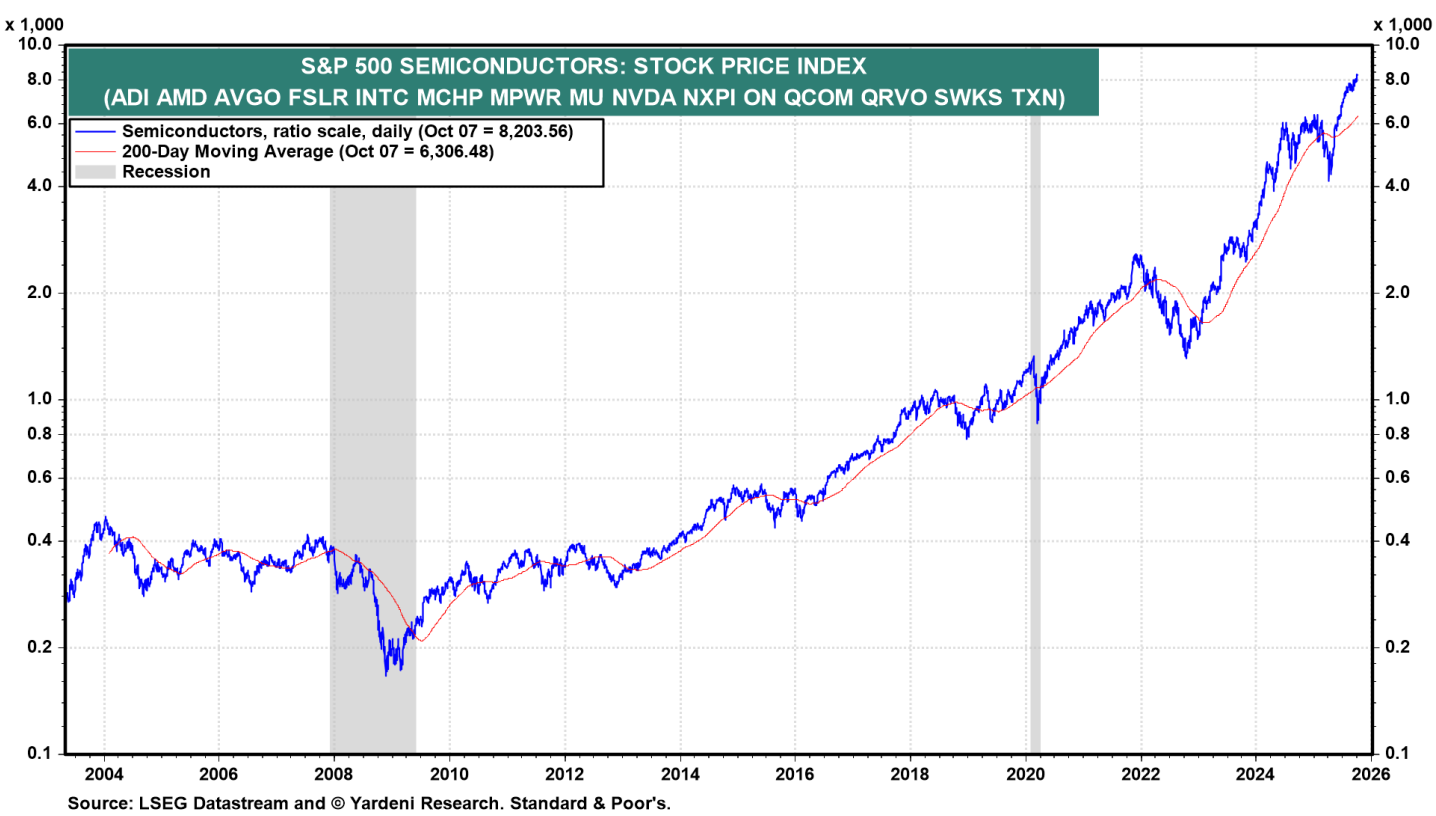


Figure 9

S&P 500 SEMICONDUCTORS' MARKET CAP* (daily, Oct 07, 2025)		
Company	Market Value (billion dollars)	Percent of Industry's Market Cap
S&P 500 Semiconductors	7,457.3	100.0
Nvidia	4,091.8	54.9
Broadcom	1,429.8	19.2
Advanced Micro Devices	291.8	3.9
Micron Technology	164.7	2.2
Intel	151.0	2.0
Qualcomm	148.0	2.0
Texas Instruments	135.2	1.8
Analog Devices	97.8	1.3
Nxp Semiconductors	43.7	0.6
Monolithic Pwr.Sys.	33.1	0.4
Microchip Tech.	28.1	0.4
First Solar	19.8	0.3
On Semiconductor	13.2	0.2
Skyworks Solutions	8.5	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 10

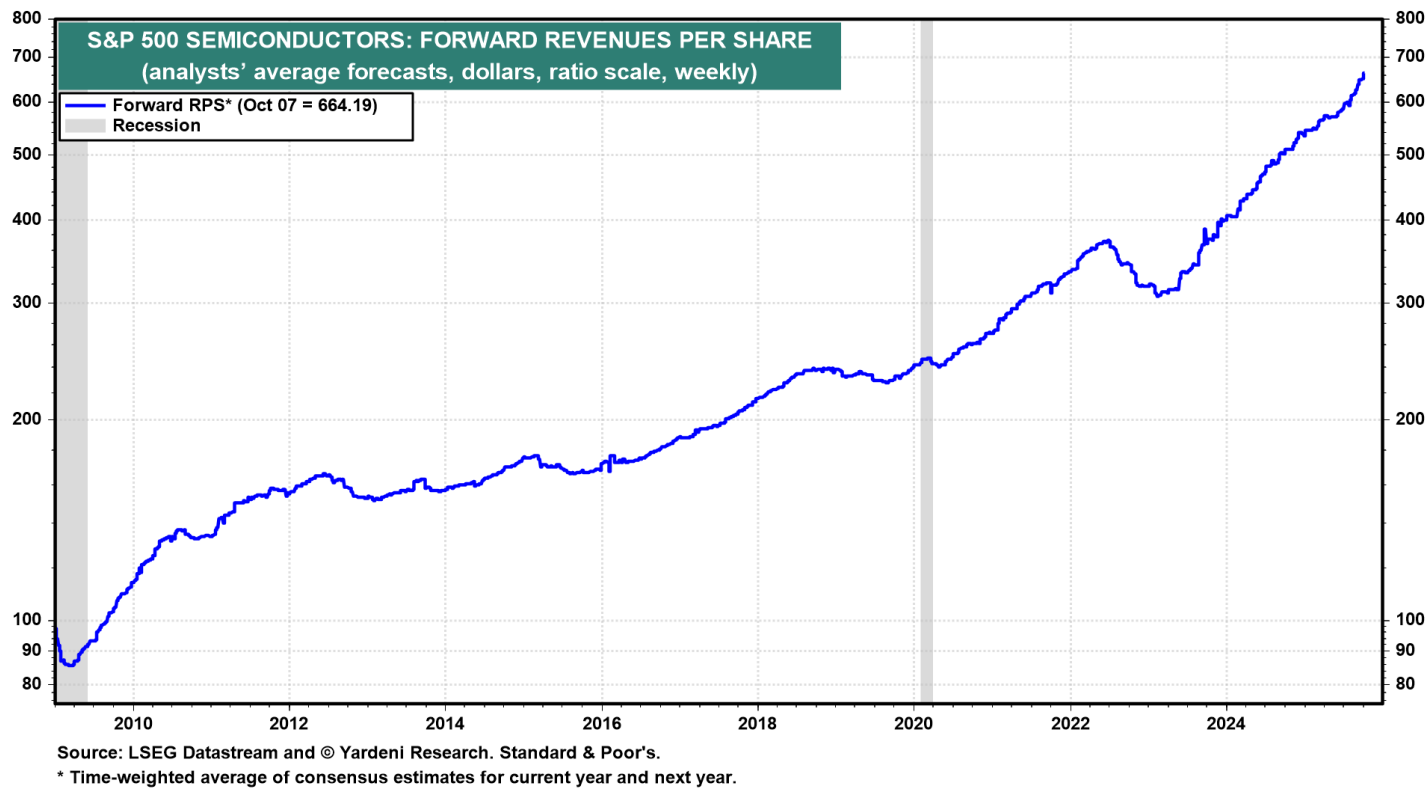


Figure 11

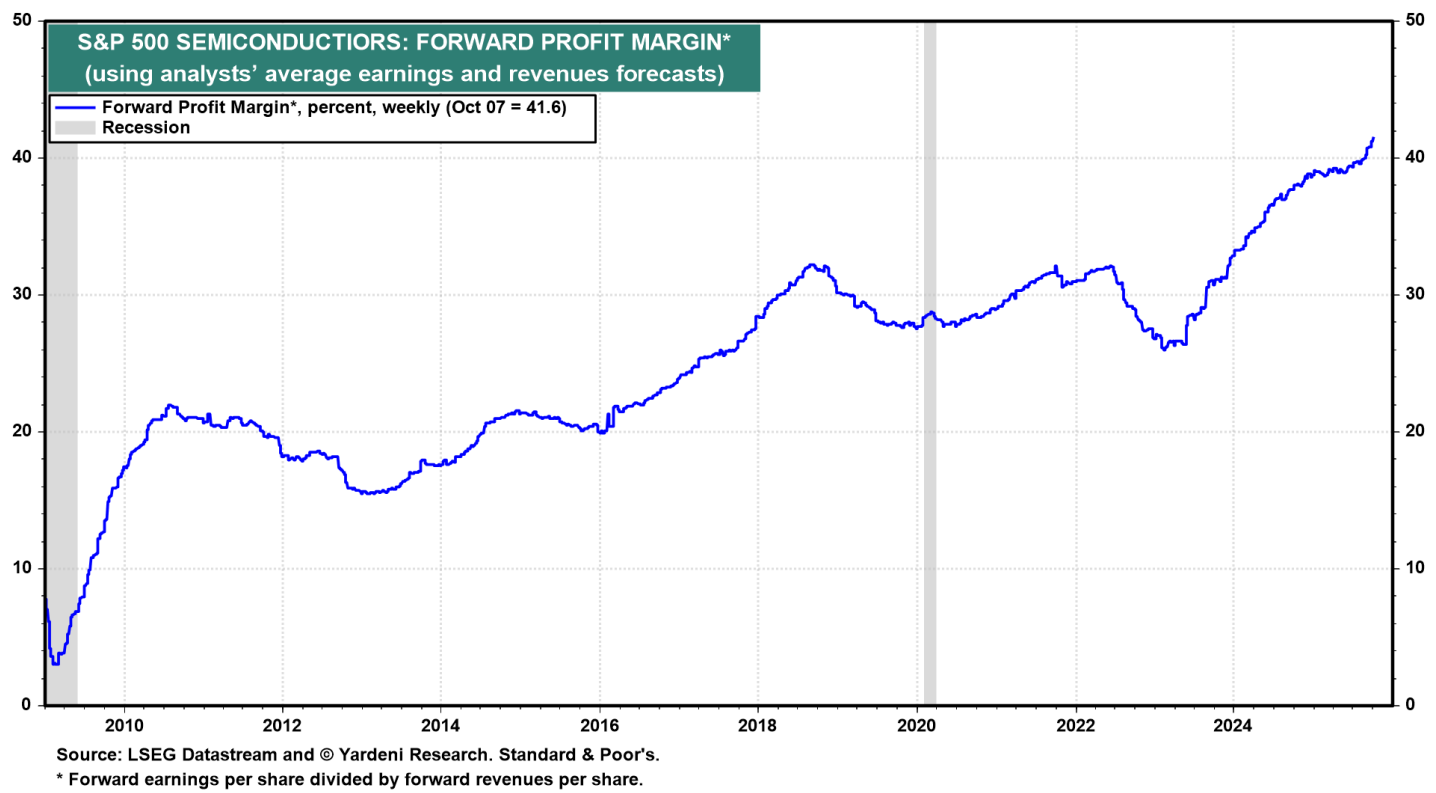


Figure 12

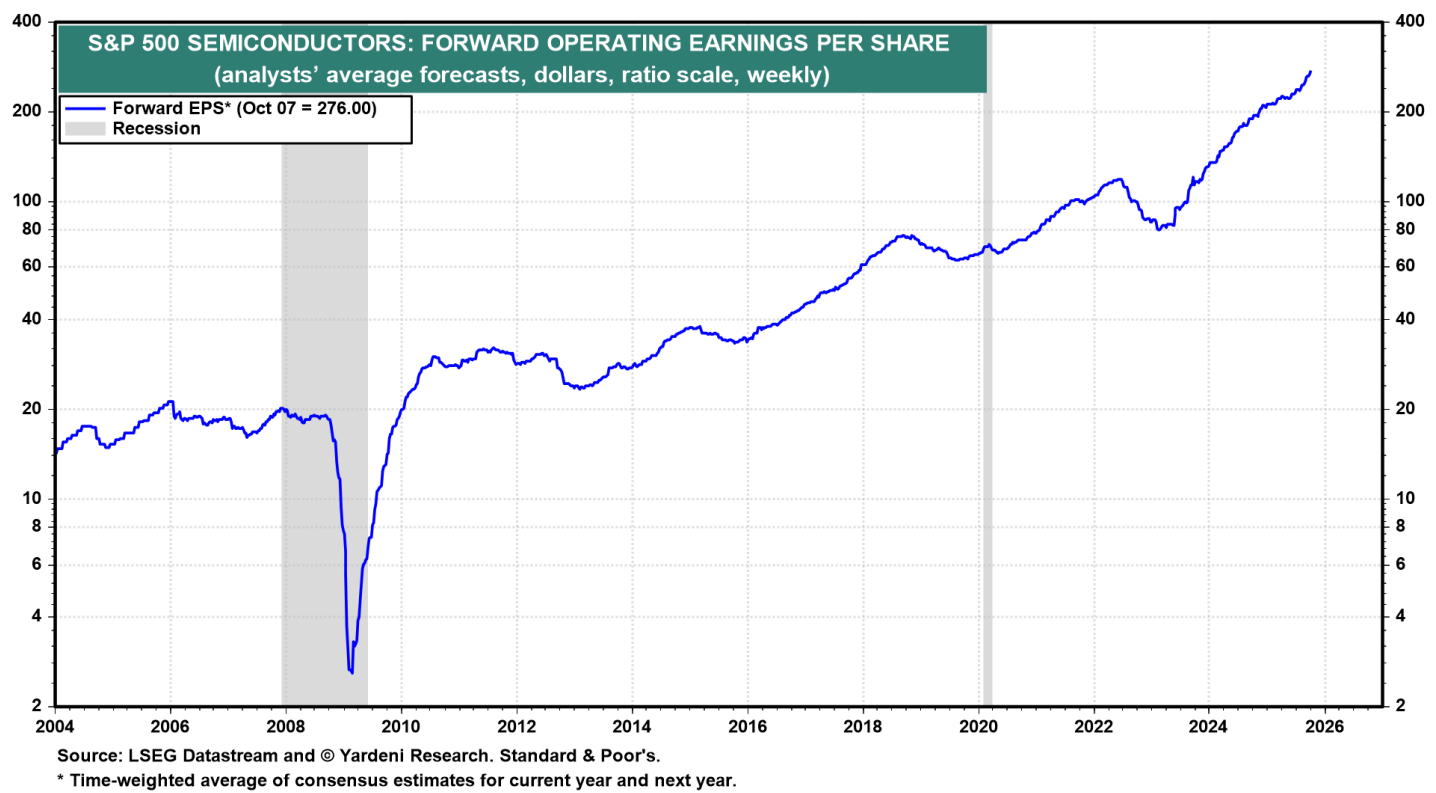


Figure 13

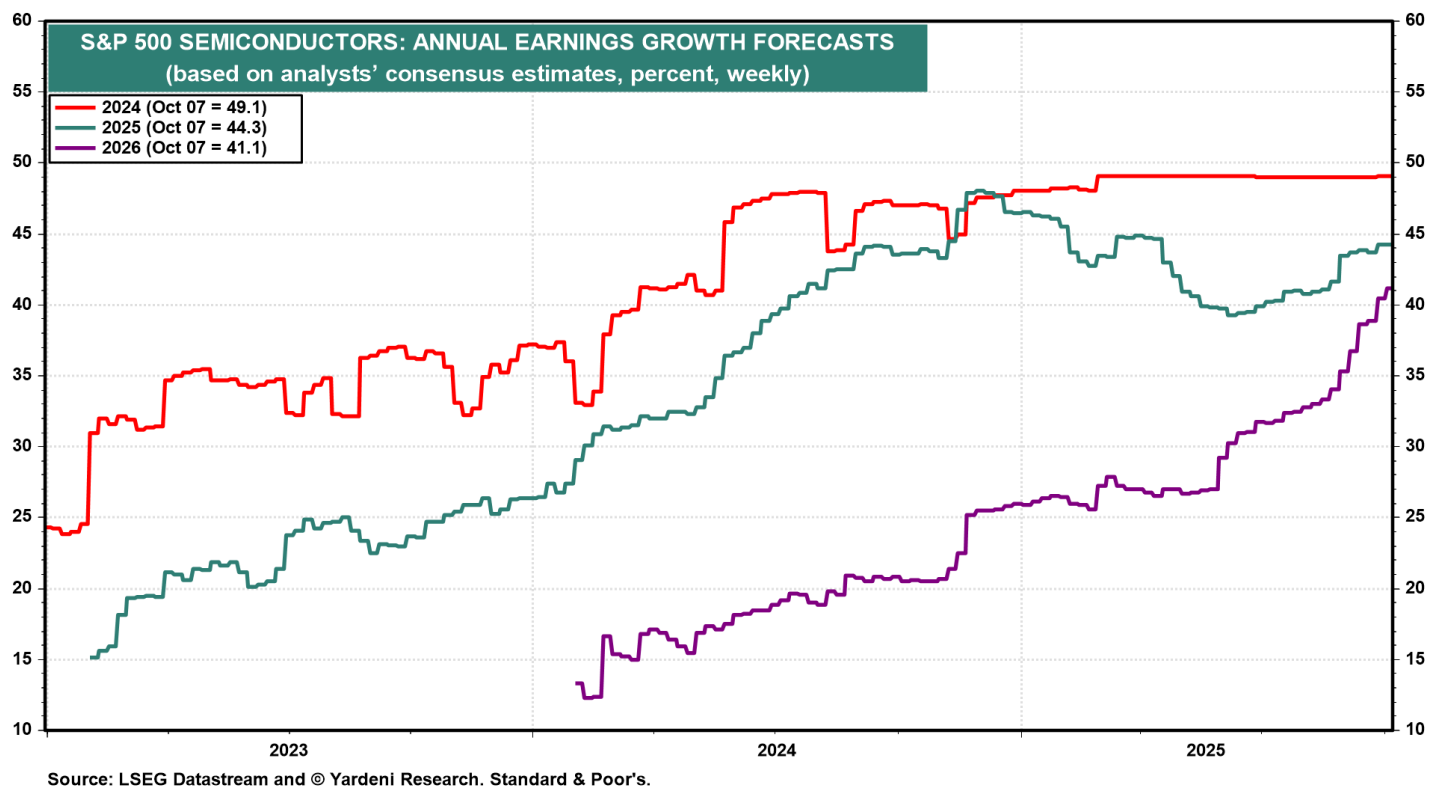


Figure 14



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