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Welcome to our networking meeting!

Delicious Heights

Today's agenda
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Insights 2026:
Stock Market and Economy

Can the S&P do it again?

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Will it be 4 in a row?

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1. The 1942-44 streak was followed by a +35.8% return in 1945.
2. The 1949-51 streak was followed by a +12.3% return in 1952.
3. The 1995-97 streak was followed by +28.6% in 1998 and +21% in 1999.
4. The 2012-14 street was followed by a +1.4% in 2015
5. The 2019-21 street was followed by a -18.1% in 2022.

Corporate earnings growing double-digits again

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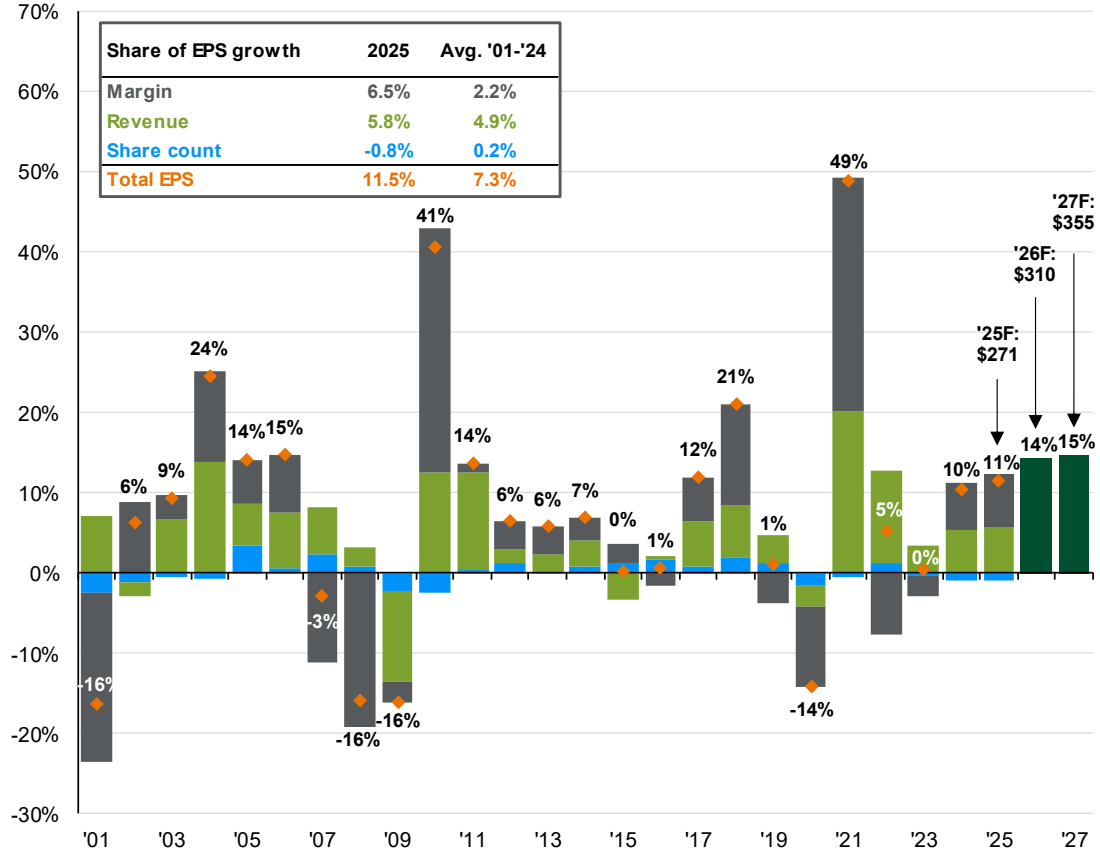
S&P 500 EPS growth

Year-over-year growth broken into changes in revenue, profit margin and share count



S&P 500 profit margins

Quarterly earnings/sales

Tax breaks in 2026

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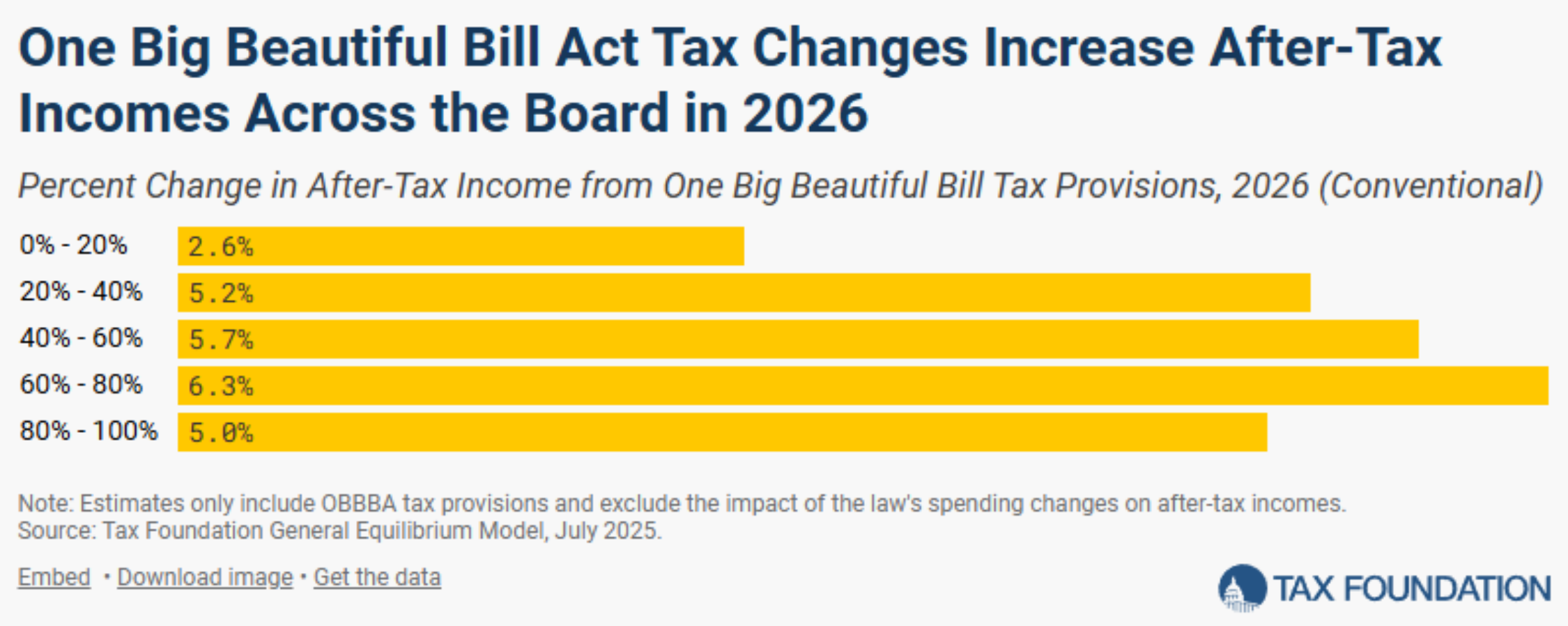

Lower prices at the pump

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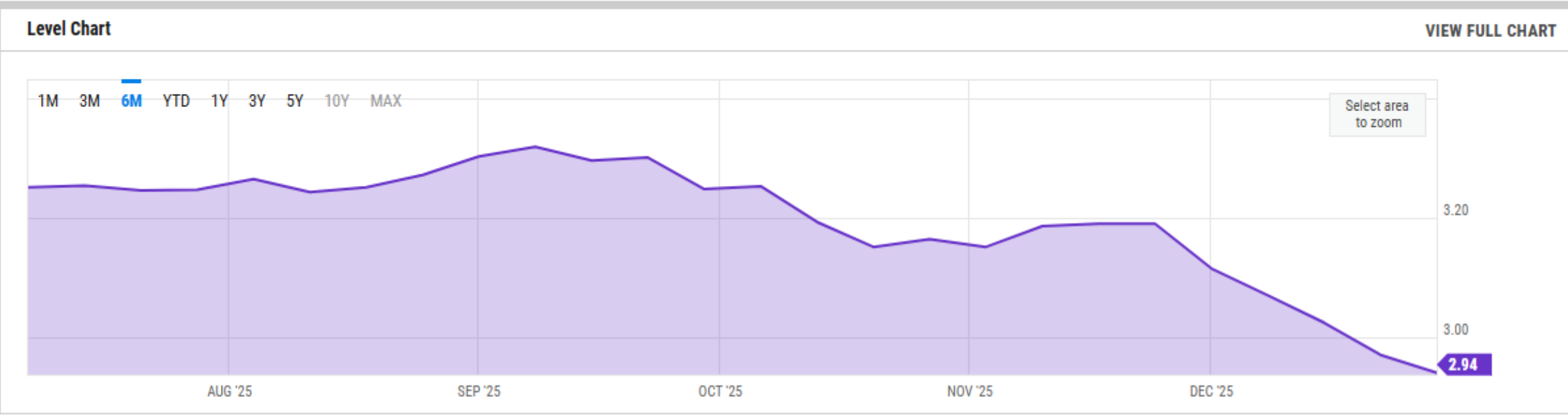
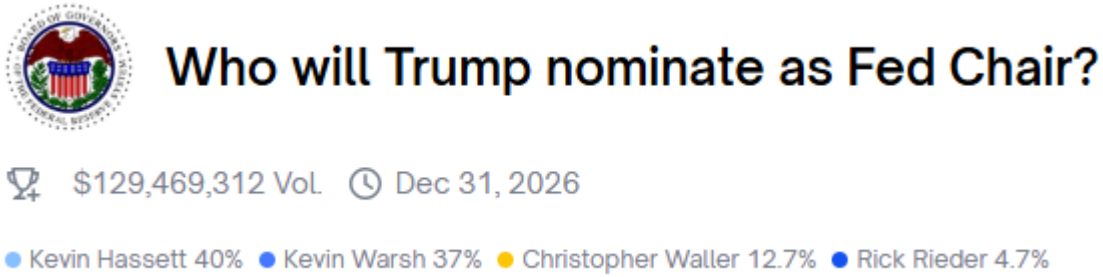
US Retail Gas Price (I:USRGP)

2.94 USD/gal for Wk of Dec 29 2025

Overview | Interactive Chart



More rate cuts to come



1. Lower borrowing costs
2. Spur housing demand
3. Push investors into stocks

Job growth stagnant – AI effect

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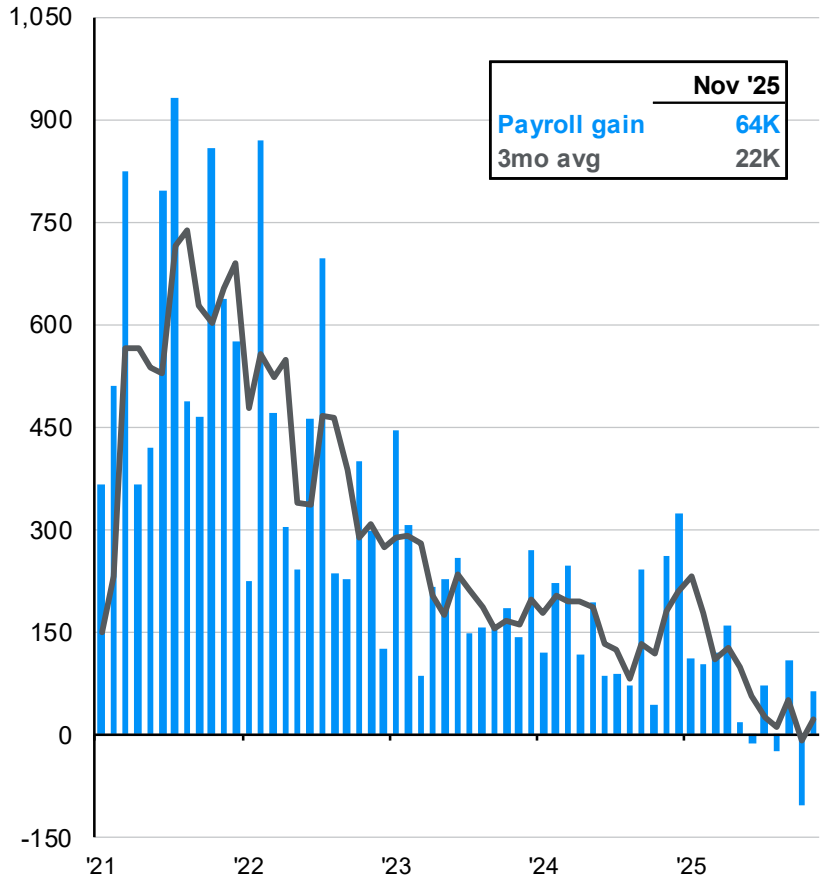
Nonfarm payroll gains

Month-over-month change and 3-month moving average, thousands, SA



Valuations are elevated

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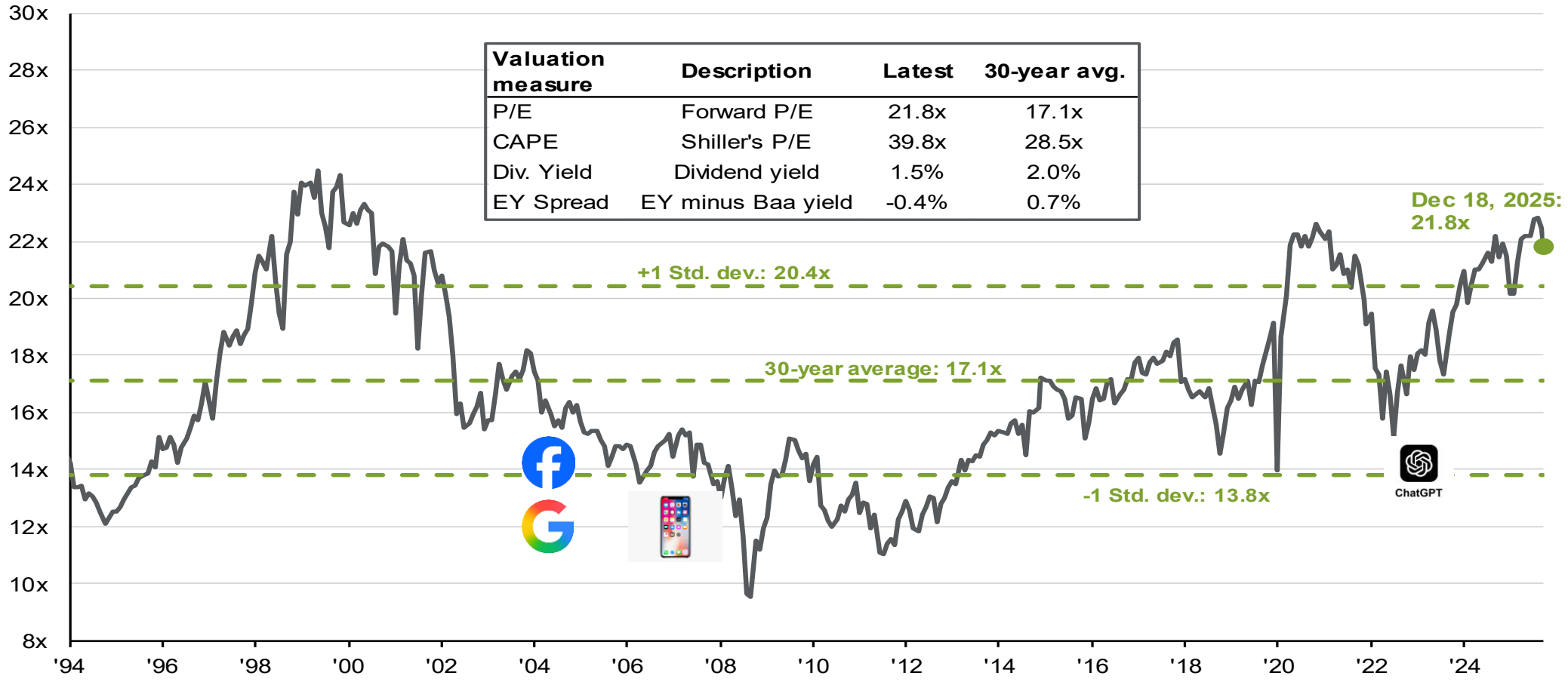
S&P 500 index: Forward P/E ratio



Valuation measure	Description	Latest	30-year avg.
P/E	Forward P/E	21.8x	17.1x
CAPE	Shiller's P/E	39.8x	28.5x
Div. Yield	Dividend yield	1.5%	2.0%
EY Spread	EY minus Baa yield	-0.4%	0.7%

Taste of Berkeley Heights

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Monday February 23rd: 6-9pm

Restaurant Trap Rock Brewery

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American Beauty AB EVENTS

Fine Indian Cuisine Neelam

Grain & Cane Bar & Table

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Sponsorship deadline is this SUNDAY

- All sponsorships come with tickets to attend
- Presenting/Gold sponsors will be featured on street banners over Springfield and Plainfield Ave

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Discounted tickets for BHBC members

Use discount code BHBC26 for $40 tickets

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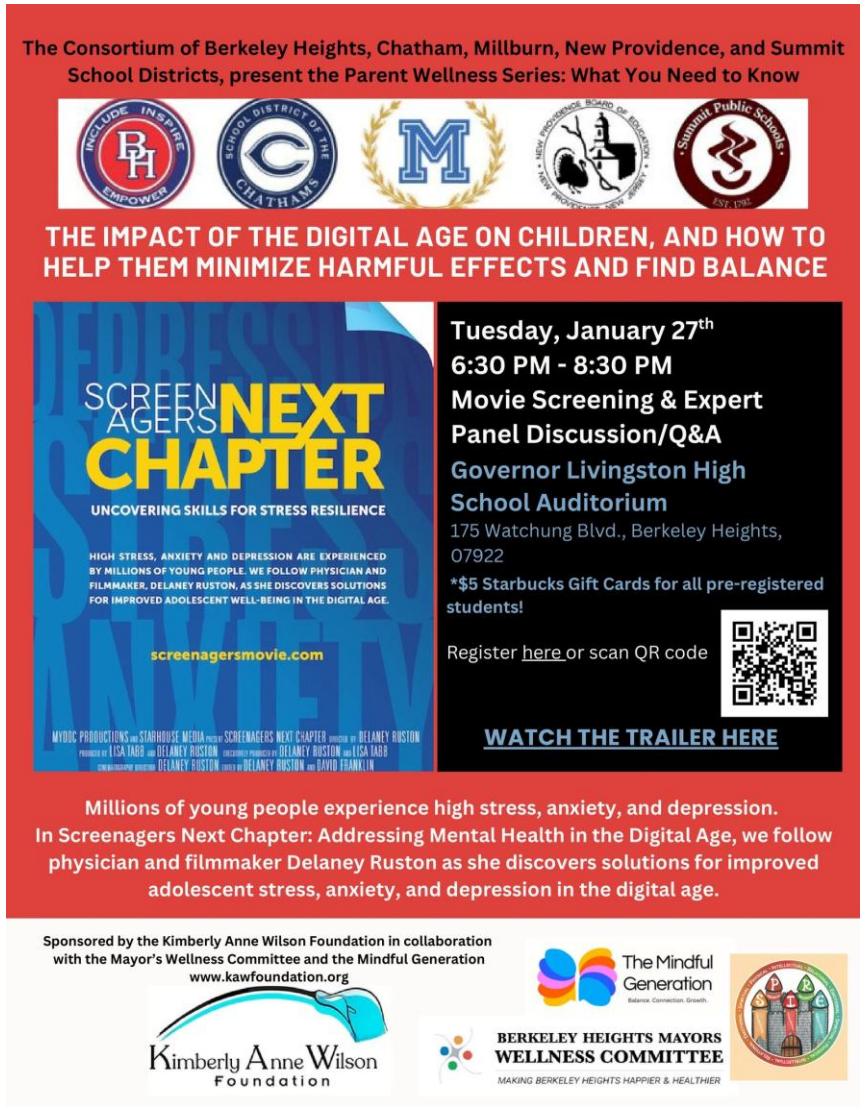

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Lunar New Year Event At The Berkeley Heights YMCA

Sunday, February 22, 2026
4:00 PM – 6:00 PM
Location: Berkeley Heights YMCA

1st Annual Men's Night Pig Roast

Saturday, February 28, 2026

07:00 PM - 11:30 PM

Mount Carmel Lower Level Hall

56 River Road, Berkeley Heights, NJ, USA

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Next morning meeting:

Friday, March 13

8-930am

Highlander Room

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