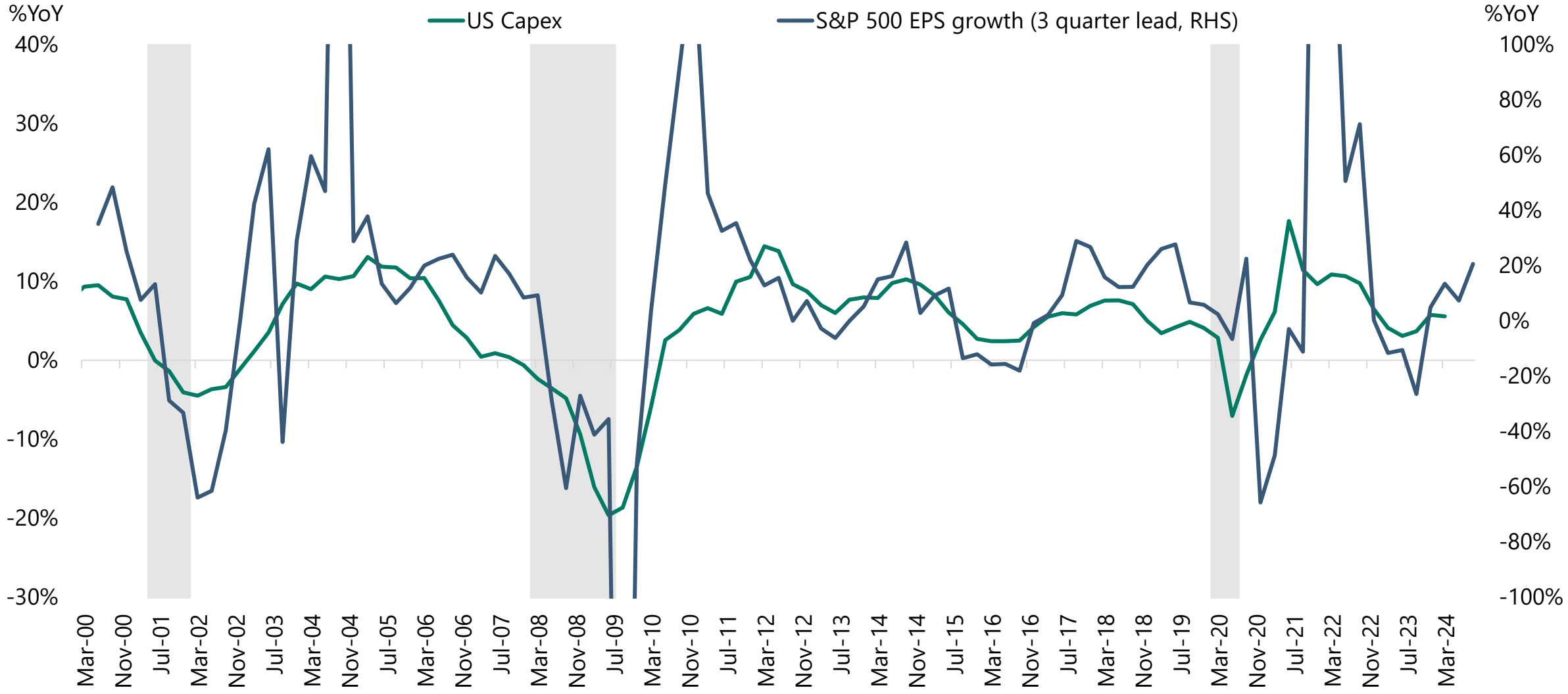
Continued strong earnings growth points to higher capex spending ahead



Source: BEA, S&P, Haver Analytics, Apollo Chief Economist