Markets

Stock Selloff Leaves Earnings Growth as Strongest Bull Pillar

By Alexandra Semenova
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A turbulent week for US stocks has shaken the bull case to its foundation. Artificial intelligence spending suddenly looks profligate. A wave of layoffs eroded confidence in the job market. The low-end consumer is starting to buckle.

What's left for bulls hoping for a year-end rally is Corporate America, where profit growth remains robust. In fact, companies in the S&P 500 Index that have reported earnings for the third quarter, about 80% of the index by market cap, have grown the bottom line by 14.6%, effectively doubling what analysts were expecting.