

VIDEO - Do Tariffs And Pricing Matter?



Using NLP on 2,488 earnings calls since March 2025, our research finds that 37% of companies mentioned both tariffs and pricing—most notably in Materials and Consumer sectors. Lower-quality and value stocks were more likely to raise the issue. Commentary about uncertainty or cost absorption correlated with weaker stock performance, while direct price pass-through and a “wait and see” approach fared better. [Read our research note for more.](#)

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