

Analog Devices, Inc. (ADI)

Technology / Semiconductors · NASDAQ Global Select

Generated: 2026-Oct-18 · Market data through: 2026-10-16

LAST CLOSE	MARKET CAP	52-WK HIGH	TRAILING PE	GROSS MARGIN	ROE	PIOTROSKI	1-YR RETURN
\$395.44	\$191.6B	\$445.91	46.7	65.8%	12%	8/9	+65.7%
2026-10-16	VOLUME	52-WK LOW	P/S	NET MARGIN	ROIC	ALTMAN Z	5-YR RETURN
	4.8M	\$223.47	13.80	29.8%	10%	8.8	+306.8%

Analog Devices, Inc. (ADI) is a technology leader specializing in the conception, production, validation, and global marketing of integrated circuits (ICs), software solutions, and advanced subsystems. Their offerings leverage sophisticated analog, mixed-signal, and digital signal processing technologies. The company's comprehensive product lineup features data converters, which are critical for transforming real-world analog signals into digital data and subsequently converting digital data back into analog signals. They also provide power management and reference devices, essential for power conversion, driver supervision, system sequencing, and energy optimization in industries such as automotive, telecommunications, industrial applications, and premium consumer markets. These power ICs are supported by integrated performance, integration, and software design simulation tools for precise power supply development. ADI's portfolio further includes high-performance amplifiers, designed for conditioning analog signals, as well as radio frequency (RF) and microwave ICs that underpin cellular infrastructure. They also develop microelectromechanical systems (MEMS) technology, encompassing accelerometers for sensing acceleration, gyroscopes for measuring rotation, inertial measurement units (IMUs) for detecting multi-axis movement, broadband switches for radio and instrumentation systems, and isolators. Moreover, the company supplies digital signal processing (DSP) and system products engineered for rapid numeric calculations. Serving a wide array of clients across the industrial, automotive, consumer, instrumentation, aerospace, and communications sectors, Analog Devices distributes its products globally. This is accomplished via a multifaceted approach, including a direct sales force, authorized third-party distributors, independent sales representatives throughout the United States, the Americas, Europe, Japan, China, and other regions of Asia, in addition to its online platform. Analog Devices, Inc. was founded in 1965 and is headquartered in Wilmington, Massachusetts.

SECTOR Technology INDUSTRY Semiconductors EXCHANGE NASDAQ MARKET CAP \$191.6B EMPLOYEES 24,500 (SEC-filed) CEO Vincent T. Roche IPO 1980-03-17
COUNTRY US
One Analog Way, Wilmington, MA 01887 · Tel 781 935 5565 · analog.com

1 INSIDERSTREET SCORE

INSIDERSTREET SCORE

81 / 100

Street mean **\$482.56** (9 analysts, last qtr) — their number, not ours

INSIDER CONSENSUS SIGNAL

ROUTINE SELLING — LOW SIGNAL

\$71M sold / 6 mo, zero open-market buys

2 PRICE AND VOLUME

adjusted close, prod data layer

1 Year vs S&P 500 · **ADI +65.7%** · **S&P 500 +15.9%** · spread **+49.8pp**



7 Years vs S&P 500 · **ADI +306.8%** · **S&P 500 +189.9%** · spread **+117.0pp**



Both charts indexed to 100 at the start of their window and drawn on a single shared scale, so the gap to the benchmark is the gap you see. Adjusted closes throughout.

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3 INSIDERSTREET SCORE live IS factor model

INSIDERSTREET
SCORE

81

OF 100

Score Breakdown

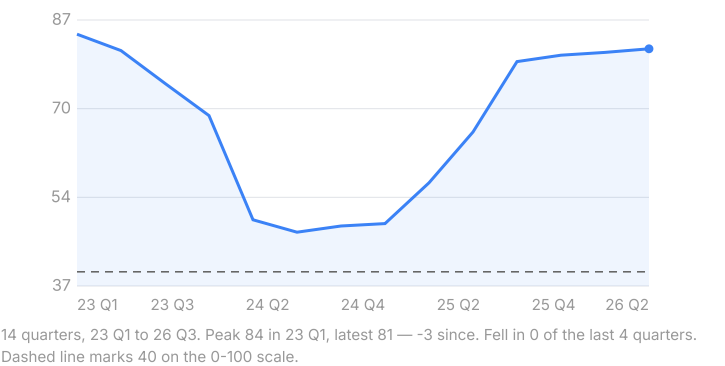
Profitability	78/100
Growth	77/100
Momentum	100/100
Quality	87/100
Earnings Quality	77/100
Balance Sheet	68/100
Value	38/100
Risk (safety)	100/100
Overall	81.4/100

Each component is a diagnostic reading on its own 0-100 scale. The overall score is computed separately from the underlying financials and is **not** the average of the rows above — components are not equally weighted and three of them (Momentum, Value, Risk) are derived partly from price rather than from the business.

Peer Comparison — IS Score

SYMBOL	IS SCORE
MRVL	67
QCOM	61
KLAC	72
ARM	80
TXN	79
AMAT	69
ADI	81

IS Score Trend — quarterly



4 TWO READINGS business vs price

BUSINESS QUALITY

81 / 100

IS Score 81.4 / 100 · -2.7 from peak of 84

Quarter	Business Quality
23 Q1	84
23 Q2	82
23 Q3	78
23 Q4	75
24 Q1	70
24 Q2	69
24 Q3	70
24 Q4	72
25 Q1	75
25 Q2	78
25 Q3	80
25 Q4	81
26 Q1	81
26 Q2	81

Fundamental factor model, quarterly. Measures how the business is doing - not where the price is going.

PRICE STRUCTURE

NEUTRAL

Technical Score 54 / 100 · Power +8 · 10 of 22 indicator votes bullish

Date	Price Structure
07-23	33
08-03	30
08-13	78
08-23	40
09-03	30
09-13	78
09-23	78
09-25	80
10-05	80
10-16	44

Vote share across trend, momentum, volume, volatility and pattern families. Describes where the price is, not where it is going.

Both readings sit above the midpoint — business quality at 81 and price structure at 54 out of 100 — so they are not in conflict. The fundamentals and the tape are saying the same thing, which is the case in which either one alone would have been enough.

5 WHAT WOULD CHANGE OUR MIND falsifiable - check us next quarter

TRIGGER	WHERE IT STANDS NOW	WHAT IT WOULD MEAN
IS Score reaches 75 and holds two consecutive quarters	now 81.4	would move us up one band
IS Score stops falling - one quarter higher than the prior	last four: 79 → 80 → 81 → 81	the direction matters more than the level
Technical vote share back above 50%	now 45%	price structure no longer broken
Institutional holder count rises two quarters running	peak 2,297 → now 2,297	fewer institutions willing to hold is our clearest warning

We publish these so the view can be shown to be wrong. If none of them move and our reading does, we owe you an explanation.

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This page is InsiderStreet's own reading, produced from the data in the rest of this document. It is not a price target and not investment advice. Analyst consensus and street price targets appear later under their own heading and are the street's numbers, not ours.

6 SMART MONEY CONFLUENCE

EDGE · disclosure sources

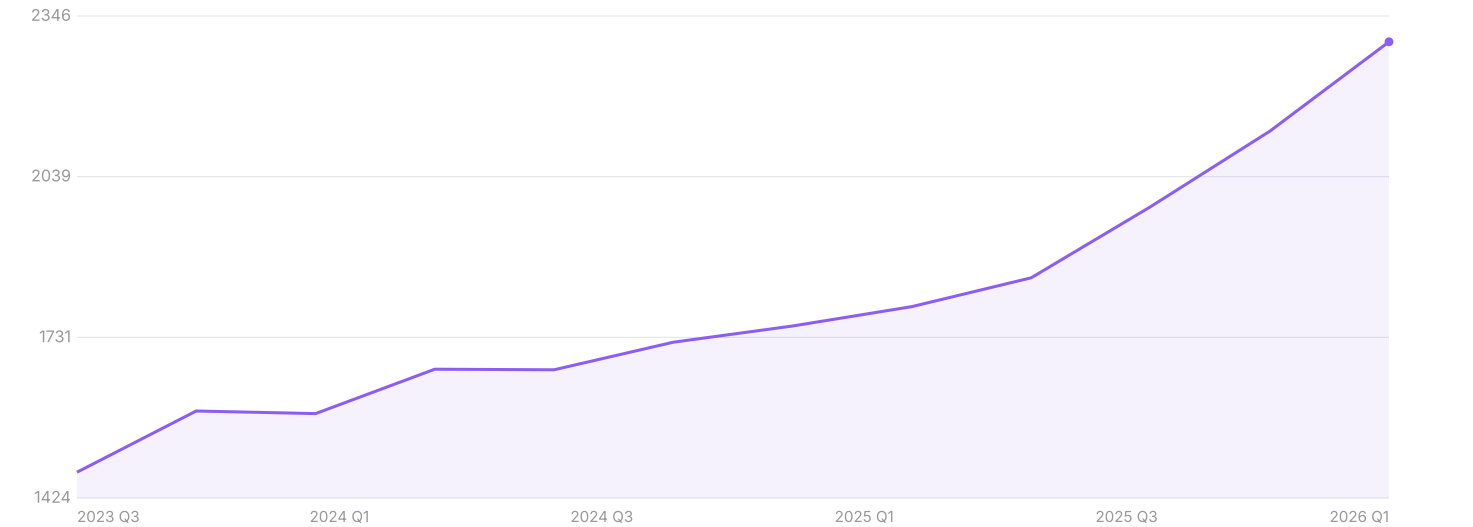
SITE CONVERGENCE SCORE 3 of 4 top 4% of 29,420 symbols	SOURCES ALIGNED — of 3 independent disclosures	CONGRESS (180D) 5 buys 2026-10-08	INSIDER BUYS (180D) 0 none disclosed
ETF FUNDS (30D) 1829 up / 1499 down net +330 funds	INSTITUTIONS ADDED (13F) 171 managers opening or increasing		

Congressional and insider figures are disclosed purchases in the trailing 180 days; ETF figures are COUNTS OF FUNDS whose holding changed in 30 days, not dollars. Coincidence of separate disclosures, not coordination. An absent source means nothing qualifying was disclosed in its window.

7 INSTITUTIONAL OWNERSHIP - 12-QUARTER TREND

13F · filed 45 days after quarter end

Institutions holding — 12 quarters



Peak 2,297 · latest 2,297 (+0 from peak).

QUARTER	HOLDERS	13F SHARES	VALUE	REPORTED OWN%
2026 Q2	2,297	445.4M	\$171.4B	91.4%
2026 Q1	2,126	428.2M	\$130.0B	87.8%
2025 Q4	1,981	437.6M	\$113.4B	89.8%
2025 Q3	1,845	428.4M	\$100.6B	87.9%
2025 Q2	1,790	446.6M	\$100.2B	91.6%
2025 Q1	1,753	436.3M	\$83.4B	89.5%
2024 Q4	1,722	437.9M	\$88.8B	89.8%
2024 Q3	1,669	433.1M	\$95.0B	88.8%
2024 Q2	1,670	439.6M	\$96.1B	90.2%
2024 Q1	1,585	433.4M	\$81.5B	88.9%
2023 Q4	1,590	433.8M	\$82.6B	89.0%
2023 Q3	1,473	435.1M	\$73.7B	89.2%

How to read ownership above 100%. A 13F reports the positions a manager has investment discretion over, and where two or more managers share discretion over the same block, each one reports it. Summed across filers, the total can therefore exceed the shares actually outstanding without anything being wrong. We publish the figure as filed rather than netting it down, and flag separately any quarter where the arithmetic is not merely high but impossible.

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8 INSIDER ACTIVITY

live Form 4 data

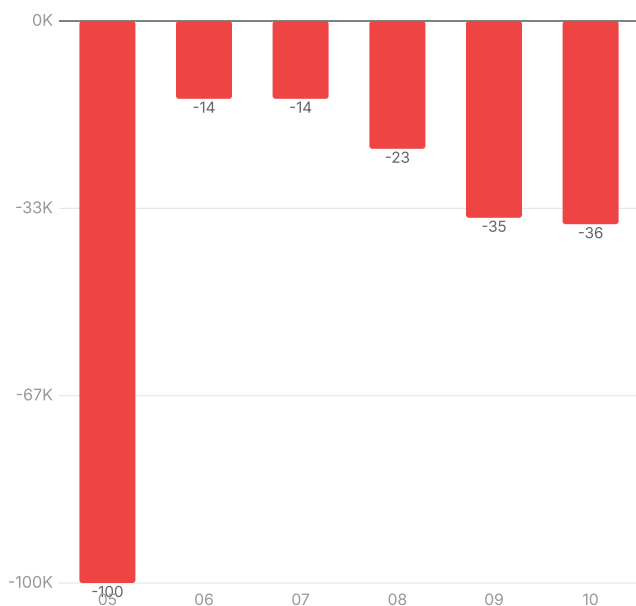
INSIDER	ROLE	DATE	TYPE	SHARES	VALUE	POST-TXN OWNED
Roche Vincent	director, Chair & CEO	2026-10-12	GIFT	13,305	—	0
Jain Vivek	Chief Operations/Tech Officer	2026-10-08	SELL	3,305	\$1.34M	40,428
Jain Vivek	Chief Operations/Tech Officer	2026-10-07	SELL	2,000	\$0.82M	43,733
Stata Ray	director	2026-10-07	SELL	333	\$0.14M	108,514
Stata Ray	director	2026-10-07	SELL	482	\$0.20M	108,032
Stata Ray	director	2026-10-07	SELL	228	\$0.09M	107,804
Stata Ray	director	2026-10-07	SELL	48	\$0.02M	107,756
Stata Ray	director	2026-10-07	SELL	234	\$0.10M	107,522

9 SELL DECOMPOSITION — ROUTINE VS. DISCRETIONARY

EDGE

6-MO DECOMPOSITION (FORM 4)	TXNS	SHARES	VALUE	SIGNAL WEIGHT
S — Open-market sales	136	184,539	\$71.0M	Counted
M — Exercises (paired A/D)	10	117,640	\$13.0M	None — mechanics
F — Tax withholding	18	81,306	\$25.5M	None — compensation
G — Gifts	2	32,505	—	None
P — Open-market purchases	0	0	\$0	Counted — none occurred

Monthly Net Insider Flow (000 shares)



Net of acquisitions minus dispositions, all Form 4 types.

Signal Summary

SIGNAL	OPEN-MARKET SELLS	OPEN-MARKET BUYS	CLUSTER
Routine Selling — Low Signal	\$71.0M 136 txns / 6 mo	\$0.0M 0 txns / 6 mo	None active 3+ insiders / 21 days

10 FORM 144 PLANNED-SALE PIPELINE

live EDGAR data

FILED	FILER	SHARES REGISTERED	EST. PROCEEDS
2026-10-08	Jain Vivek	3,306	\$1.3M
2026-10-07	Jain Vivek	2,000	\$0.8M
2026-10-06	Puccio Richard C Jr	1,500	\$0.6M
2026-10-02	Nakamura Katsufumi	1,200	\$0.5M
Trailing 12 mo	43 filings	354,847	\$119M

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11 13D / 13G STAKES					COND
FILED	FORM	REPORTING PERSON	% OF CLASS	SHARES	
2026-03-26	SCHEDULE 13G/A	The Vanguard Group	—	exit/reporting change	
2025-08-05	SCHEDULE 13G/A	JPMORGAN CHASE & CO.	4.40%	21.9M sh	
2025-07-30	SCHEDULE 13G	JPMORGAN CHASE & CO.	5.00%	25.1M sh	
2025-03-06	SCHEDULE 13G/A	JPMORGAN CHASE & CO.	4.30%	21.8M sh	

12 CONGRESSIONAL TRADING					EDGE · STOCK Act
MEMBER	CHAMBER	TRADE	SIZE BAND	TRADED	DISCLOSED
Rick Larsen	House	BUY	\$1,001 - \$15,000	2026-10-08	2026-10-13
Ro Khanna	House	BUY	\$1,001 - \$15,000	2026-09-04	2026-10-09
Rich McCormick	House	SELL	\$1,001 - \$15,000	2026-07-30	2026-08-17
Sheldon Whitehouse	Senate	SELL	\$1,001 - \$15,000	2026-09-04	2026-10-01
Sheldon Whitehouse	Senate	SELL	\$1,001 - \$15,000	2026-09-04	2026-10-01
Sheldon Whitehouse	Senate	SELL	\$1,001 - \$15,000	2026-09-04	2026-09-30
HOUSE 12-MO 31 trades 9 purchases		SENATE 12-MO 5 trades 0 purchases		COVERAGE STOCK Act filings 30-45 day disclosure lag	

13 INSTITUTIONAL OWNERSHIP & 13F FLOW				live 13F data
13F FILERS (LAST COMPLETE Q) 2,126	13F SHARES 428M 87.8% of shares out	NEW / CLOSED 282 / 100 positions, QoQ	INCREASED / REDUCED 770 / 793 positions, QoQ	
PUT/CALL (13F) 1.02 option positions	FREE FLOAT 99.7% 483M sh			

2.8 · Largest Reporting 13F Managers

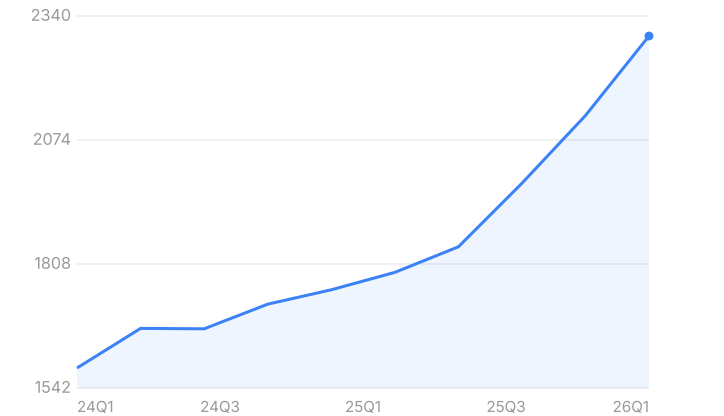
MANAGER	SHARES	VALUE
Assenagon Asset Management S.A.	932,897	\$370M
Pinestone Asset Management Inc.	878,833	\$349M
Fenimore Asset Management Inc	464,537	\$184M
Davenport & Co Llc	438,695	\$174M
Confluence Investment Management L	282,267	\$112M
Wealth Enhancement Advisory Servic	273,265	\$76M

EDGAR 13F holdings as of 2026-09-30; filer values normalized to dollars.

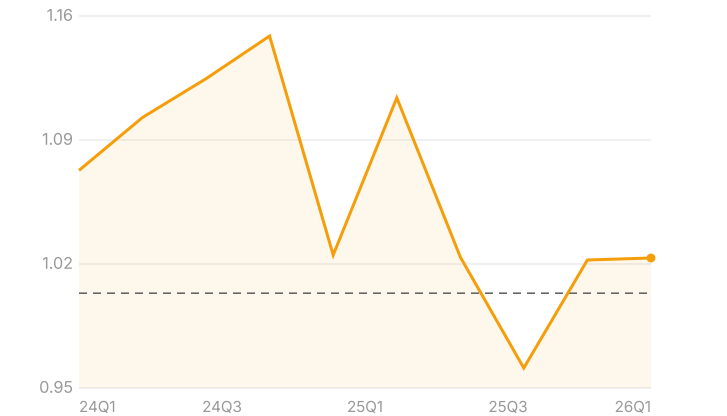
2.9 · Top ETF & Fund Ownership

FUND	WEIGHT	POSITION
VITSX	0.3%	\$6.1B
VTSAX	0.3%	\$6.1B
VSMPX	0.3%	\$6.1B
VTI	0.3%	\$6.1B
VOO	0.3%	\$5.1B
VFFSX	0.3%	\$5.1B

13F Filers Holding ADI — quarterly



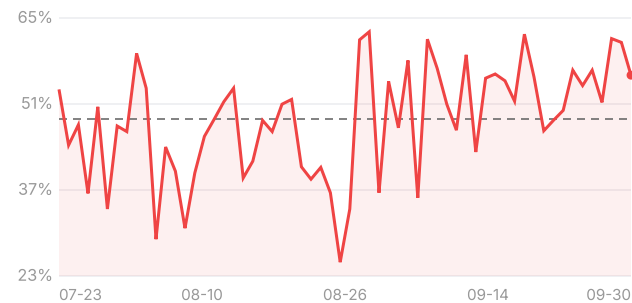
Institutional Put/Call — quarterly



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14 SHORT VOLUME — DAILY, 60 SESSIONS

EDGE · live FINRA feed



LATEST SESSION
55.4%
2026-10-15

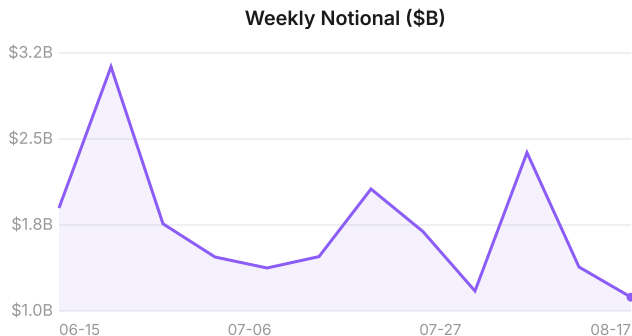
20-DAY AVG
53.5%
50-day 48.3%

TREND
Rising
20d vs 50d

BY MARKET CENTER
Q: 55% · N: 63% · B: 54%
latest session

15 DARK POOL ACTIVITY

EDGE · live ATS data

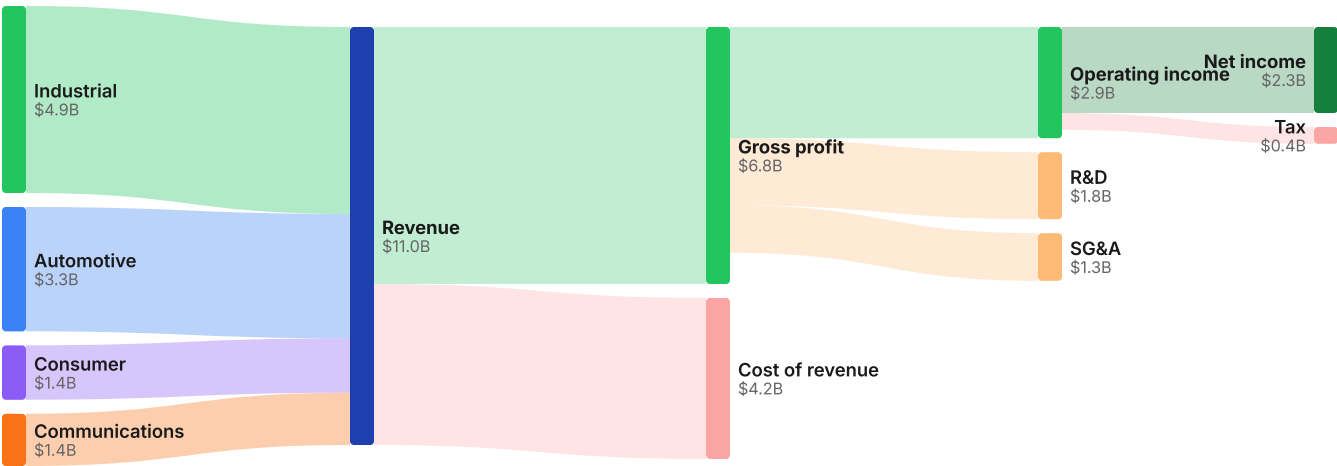


Where ADI Trades in the Dark

ATS VENUE (4-WK)	SHARES	AVG TRADE
Incr Intelligent Cross Llc	4.7M	43 sh
Ubsa Ubs Ats	4.2M	50 sh
Sgmt Sigma X2	2.7M	46 sh
Ebxl Level Ats	2.2M	26 sh
Pure Purestream	1.9M	32 sh
Mspl Ms Pool (Ats- 4)	1.7M	157 sh

16 REVENUE FLOW — FY2025

live segmentation + income data



Where a dollar of Analog Devices, Inc. revenue goes. All values FY2025 filings, live.

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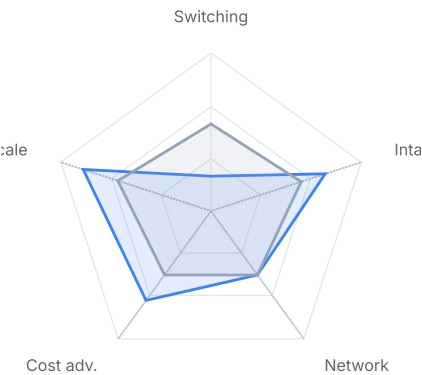
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17 GEOGRAPHIC REVENUE live segmentation

REGION	REVENUE	SHARE
Non-US	\$7.8B	41%
UNITED STATES	\$3.2B	17%
CHINA	\$2.9B	15%
Europe	\$2.3B	12%
Rest of Asia	\$1.5B	8%
JAPAN	\$990M	5%
Rest of North and South America	\$162M	1%

18 MOAT & COMPETITIVE POSITION LIVE MODEL · 59/100 NARROW

Moat score 59/100 — Narrow; primary source Efficient Scale.

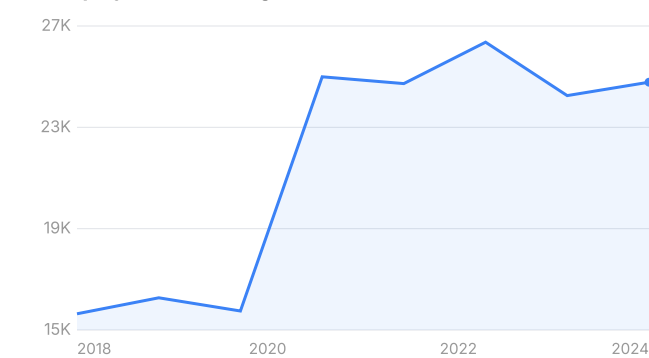


■ ADI (live moat model)

■ Peer median: MRVL · QCOM · KLAC · ARM · TXN

Component scores from the live moat model. Peer median illustrative.

3.8 · Employees (SEC filings)



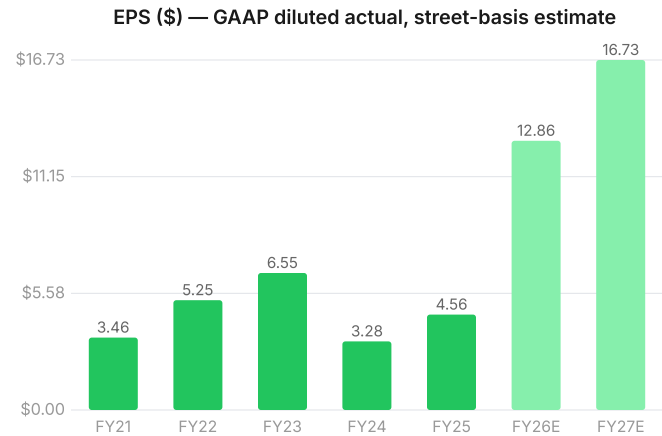
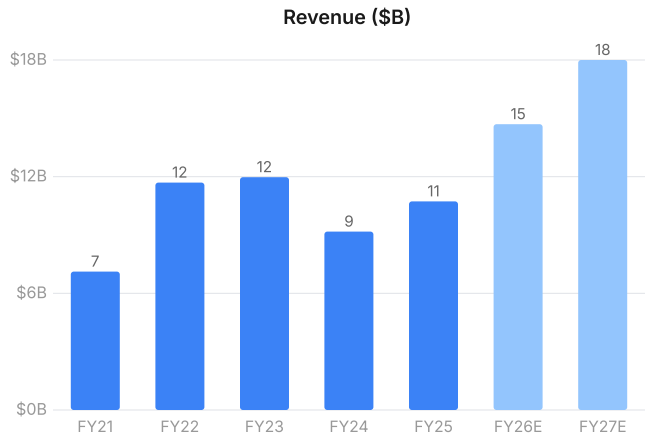
19 CORPORATE INFORMATION — KEY OFFICERS 24,500 employees

OFFICER	TITLE
Vincent T. Roche	Chief Executive Officer & Chair of the Board of Directors
Richard C. Puccio Jr.	Chief Financial Officer
Vivek Jain	Chief Operations & Technology Officer
Katsufumi Nakamura	Chief Customer Officer

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20 REVENUE & EPS — HISTORY AND ESTIMATES

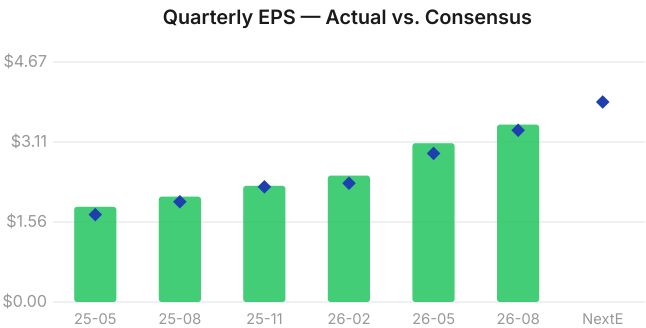
live consensus



Actual bars are GAAP diluted EPS from the filed income statement; the lighter forward bars are street-basis consensus. The two are different measures and are not comparable quarter to quarter.

21 ESTIMATE VS. ACTUAL & SURPRISES

live data



BEATS (>2%) 5 of 6 recent quarters	AVG SURPRISE +5.3%	NEXT REPORT 2026-11-24	INCOME QUALITY 1.34 OCF + net income
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22 REPORTED VS. CONSENSUS — FULL HISTORY

0 quarters · live data

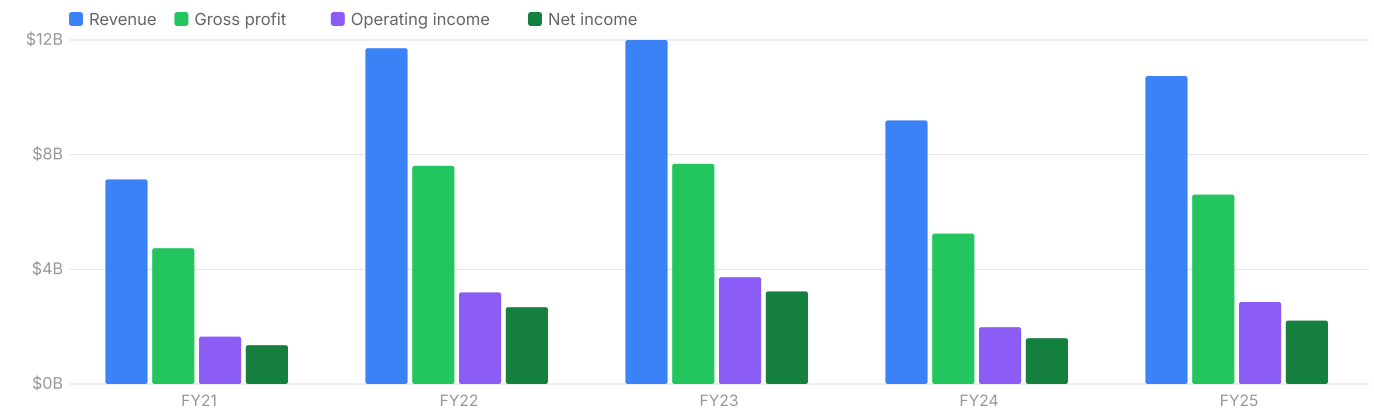
BEAT RATE —% 0 of 0 quarters	CURRENT STREAK 0 longest 0	AVG EPS SURPRISE —% median —%	SURPRISE TREND — last 4 vs prior 4
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PERIOD	EPS EST.	EPS ACTUAL	EPS SURPRISE	REV EST. (\$M)	REV ACTUAL (\$M)	REV SURPRISE
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Announcement dates to . Consensus as it stood at each report. Revenue surprise shown where both estimate and actual are filed. A beat record is history, not a forecast.

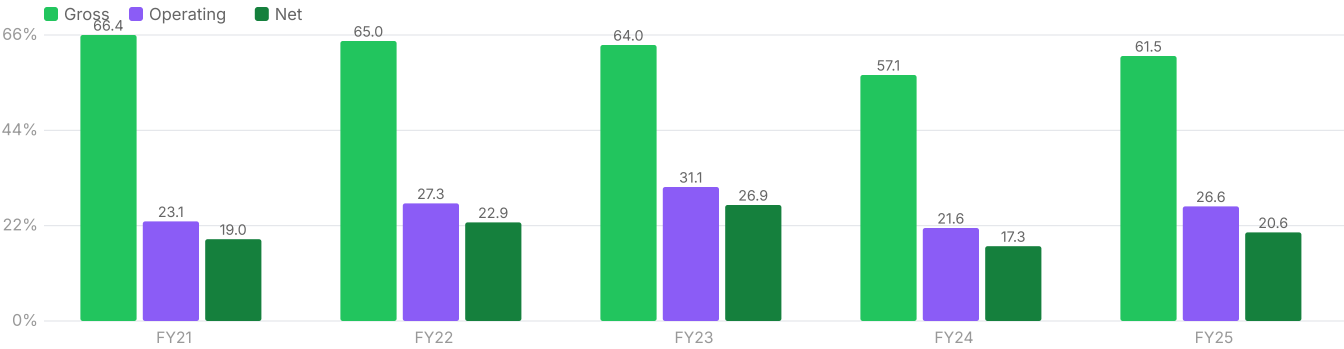
INCOME TRENDS — 5 YEAR

live financials

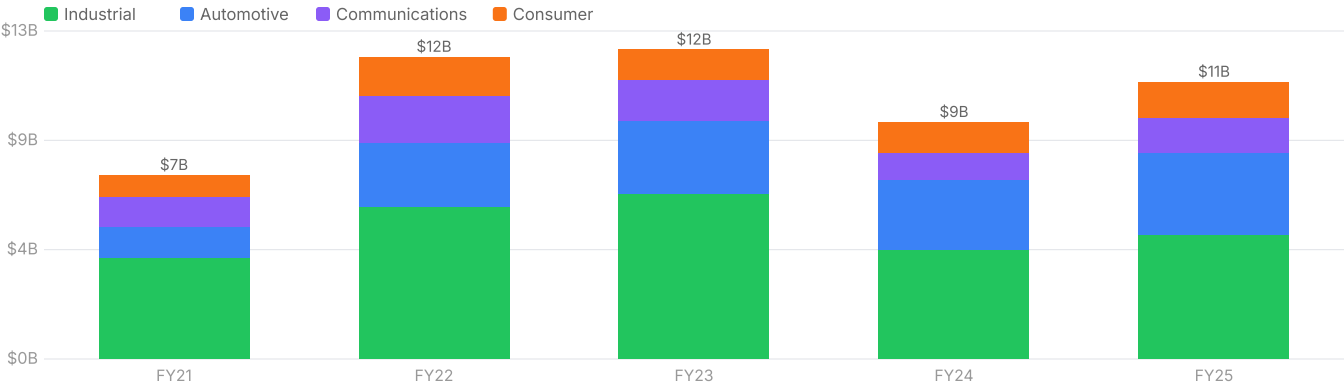


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Profit Margins (%)



Revenue by Segment — Stacked



Live segmentation data.

YoY Growth Heatmap — Income Lines

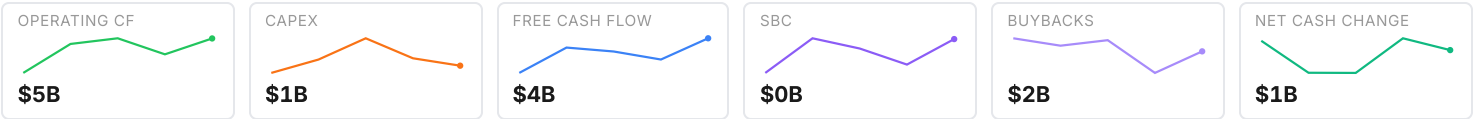
YOY GROWTH	FY21	FY22	FY23	FY24	FY25
Revenue	+30.6%	+64.2%	+2.4%	-23.4%	+16.9%
Gross profit	+31.6%	+60.7%	+0.9%	-31.7%	+25.9%
Operating income	+12.9%	+93.8%	+16.6%	-46.8%	+44.3%
Net income	+13.9%	+97.7%	+20.6%	-50.7%	+38.7%

23 INCOME STATEMENT — FULL						live financials
\$B · FY ENDS	FY21	FY22	FY23	FY24	FY25	TREND
Revenue	7.3	12.0	12.3	9.4	11.0	
Cost of revenue	2.5	4.2	4.4	4.0	4.2	
Gross profit	4.9	7.8	7.9	5.4	6.8	
R&D expense	1.3	1.7	1.7	1.5	1.8	
SG&A expense	0.9	1.3	1.3	1.1	1.3	
Operating income	1.7	3.3	3.8	2.0	2.9	
EBITDA	2.6	5.6	6.2	4.2	5.0	
D&A	1.1	2.3	2.3	2.1	2.0	
Pretax income	1.3	3.1	3.6	1.8	2.7	
Income tax	-0.1	0.4	0.3	0.1	0.4	
Net income	1.4	2.7	3.3	1.6	2.3	
Diluted EPS (\$)	3.46	5.25	6.55	3.28	4.56	
Diluted shares (M)	401	523	506	499	497	

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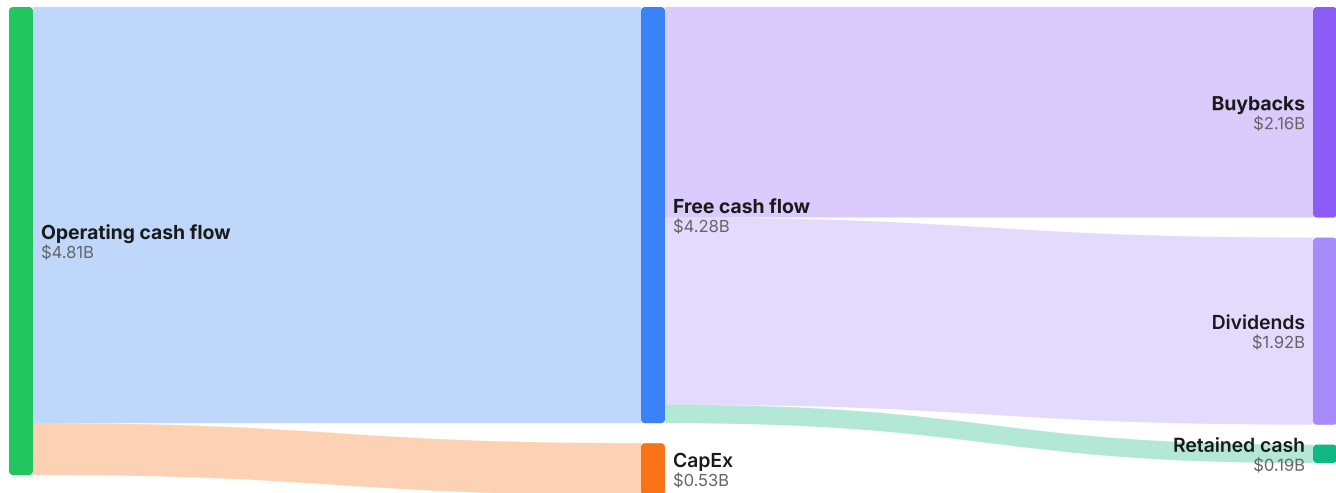
CASH FLOW TRENDS

live data



WHERE THE CASH WENT — FY2025

cash Sankey, live data



Balance Sheet — Full

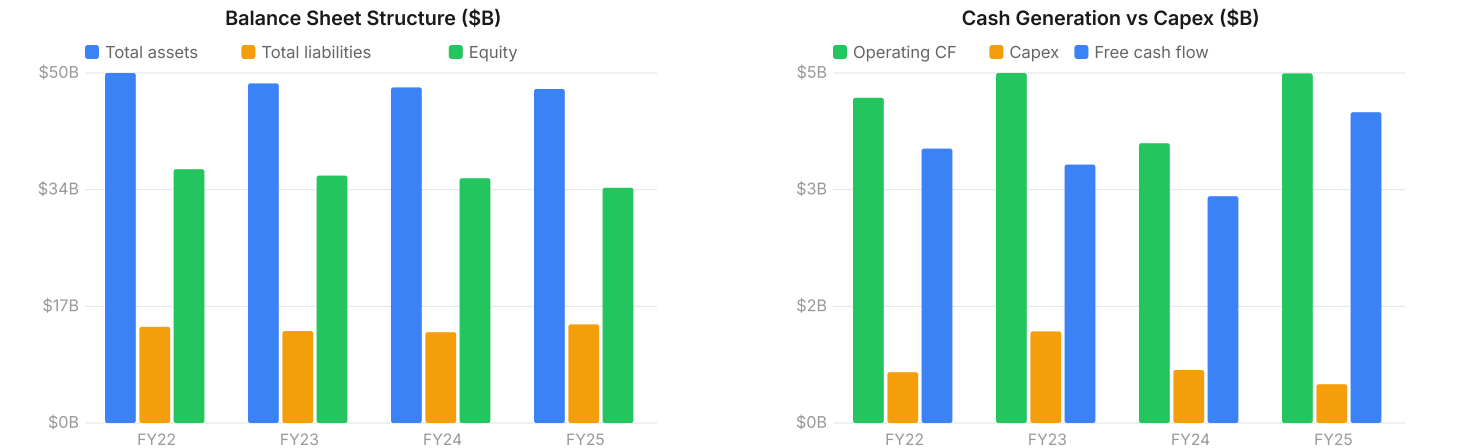
\$B	FY22	FY23	FY24	FY25	
Cash & equivalents	1.5	1.0	2.0	2.5	
ST investments	0.0	0.0	0.4	1.2	
Receivables (net)	1.8	1.5	1.3	1.4	
Total current assets	4.9	4.4	5.5	7.1	
PP&E (net)	2.4	3.2	3.4	3.3	
Goodwill + intangibles	40.2	38.2	36.5	35.0	
Total assets	50.3	48.8	48.2	48.0	
Accounts payable	0.6	0.5	0.5	0.5	
Short-term debt	0.0	1.0	0.9	0.4	
Deferred revenue	0.0	0.0	0.0	0.0	
Total current liabilities	2.4	3.2	3.0	3.2	
Long-term debt	6.5	5.9	6.6	8.1	
Total liabilities	13.8	13.2	13.1	14.2	
Shareholders' equity	36.5	35.6	35.2	33.8	

Cash Flow Statement — Full

\$B	FY22	FY23	FY24	FY25	
Net income	2.7	3.3	1.6	2.3	
D&A	2.3	2.3	2.1	2.0	
Stock-based compensation	0.3	0.3	0.3	0.3	
Working capital change	(0.9)	(0.6)	0.2	0.5	
Operating cash flow	4.5	4.8	3.9	4.8	
Capital expenditures	(0.7)	(1.3)	(0.7)	(0.5)	
Investing cash flow	(0.7)	(1.3)	(1.1)	(1.3)	
Buybacks	(2.6)	(3.0)	(0.6)	(2.2)	
Dividends paid	(1.5)	(1.7)	(1.8)	(1.9)	
Debt issuance / (repay)	(0.2)	0.5	0.6	1.0	
Financing cash flow	(4.3)	(4.1)	(1.7)	(3.0)	
Free cash flow	3.8	3.6	3.1	4.3	

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Left: what the balance sheet is made of — the gap between the assets bar and the liabilities bar is book equity. Right: whether the capex bar is covered by the operating-cash bar; where it is not, the difference was funded externally and free cash flow goes negative.

24 EXPANDED RATIO ANALYSIS (I)						live ratio engine · profitability · valuation
RATIO	FY21	FY22	FY24	FY25	TTM	TREND
PROFITABILITY						
ROE	5.6%	7.4%	4.6%	6.6%	12%	
ROA	3.8%	5.4%	3.4%	4.7%	8.5%	
ROIC	4.1%	7.0%	4.6%	6.3%	9.6%	
Gross margin	66.4%	65.0%	57.1%	61.5%	65.8%	
Operating margin	23.1%	27.3%	21.6%	26.6%	35.5%	
Net margin	19.0%	22.9%	17.3%	20.6%	29.8%	
EBITDA margin	35.4%	46.6%	44.6%	45.6%	50.6%	
FCF margin	32.7%	31.4%	33.1%	38.8%	—	
VALUATION						
P/E	56.49	25.69	67.36	50.75	46.7	
P/B	2.07	1.94	3.13	3.40	5.7	
P/S	10.73	5.88	11.69	10.44	13.80	
P/FCF	32.84	18.70	35.28	26.90	38.8	
EV/EBITDA	32.22	13.53	27.46	23.88	28.3	
EV/Revenue	11.39	6.31	12.25	10.90	14.3	
Earnings yield	1.8%	3.9%	1.5%	2.0%	2.14%	
FCF yield	3.0%	5.3%	2.8%	3.7%	2.58%	

EXPANDED RATIO ANALYSIS (II)						leverage · solvency
RATIO	FY21	FY22	FY24	FY25	TTM	TREND
LEVERAGE & SOLVENCY						
Current ratio	1.94	2.02	1.84	2.19	1.25	
Quick ratio	1.51	1.45	1.35	1.68	0.91	
Debt / equity	0.18	0.18	0.22	0.26	0.27	
Debt / assets	13.0%	13.1%	15.9%	18.1%	18.8%	
Net debt / EBITDA	1.87	0.92	1.26	1.00	0.99	
Interest coverage	8.19	16.46	6.52	9.54	—	

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EXPANDED RATIO ANALYSIS (III)						efficiency · growth · per-share · scores
RATIO	FY21	FY22	FY24	FY25	TTM	TREND
EFFICIENCY						
Asset turnover	0.20	0.23	0.19	0.23	0.29	
Receivables turnover	6.66	7.37	6.39	7.95	5.8	
DSO (days)	55	50	57	46	63	
DPO (days)	50	44	48	44	52	
Cash conversion cycle	139	118	151	135	159	
GROWTH (YoY)						
Revenue growth	30.6%	64.2%	-26.6%	16.9%	—	
Net income growth	13.9%	97.7%	-56.4%	38.7%	—	
EPS growth	-13.1%	87.0%	-56.0%	40.2%	—	
FCF growth	29.8%	57.9%	-15.4%	37.0%	—	
PER SHARE (\$)						
EPS (diluted, TTM)	2.85	5.33	3.28	4.60	8.48	
Book value / share	77.89	70.70	70.53	68.56	68.82	
Revenue / share	15.00	23.29	18.90	22.34	28.48	
FCF / share	4.90	7.32	6.26	8.67	10.13	
Cash / share	4.06	2.85	4.74	7.40	4.77	
SHAREHOLDER RETURN & SCORES						
Buyback yield	4.0%	3.6%	0.6%	1.9%	1.74%	
Altman Z-Score	3.78	3.82	5.76	5.71	8.8	
Piotroski F-Score	5	7	5	8	8/9	
Beneish M-Score	-1.65	-2.40	-2.82	-2.69	-2.19	

25 EARNINGS QUALITY PANEL				live scores
MODEL	SCORE	ZONE	NOTE	
Piotroski F-Score	8 / 9	Strong		
Altman Z-Score	8.8	Safe (>2.99)	Safe	
Income quality	1.34	Cash-backed	OCF ÷ net income	
Beneish M-Score	-2.19	Elevated	vs -2.22 threshold	

26 DUPONT & GROWTH QUALITY				live analysis engine
DUPONT DECOMPOSITION (TTM)		VALUE	GROWTH QUALITY (LIVE)	VALUE
Tax burden		0.88	Revenue stability	0.57
Interest burden		0.93	Earnings stability	0.35
Operating margin		36.4%	Earnings persistence	0.50
Asset turnover		0.29×	Revenue CAGR 3y	2.6%
Financial leverage		1.43×	EPS CAGR 3y	5.8%
= ROE		12%	FCF CAGR 3y	7.7%

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SHAREHOLDER RETURN PROFILE live

BUYBACK YIELD 1.74%	DIVIDEND YIELD 1.08%	TOTAL SHAREHOLDER RETURN 2.80% cash yield	SBC / REVENUE 2.5% dilution pressure
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27 MULTIPLE HISTORY — FY SNAPSHOTS + TTM live ratio engine



28 PEER COMPARISON live peer engine

COMPANY	MKT CAP	P/E	ROE	NET MARGIN	REV GROWTH	PIOTROSKI	1-YR RET
MRVL	\$199.5B	74.7	17%	11.2%	+30.6%	7/9	+158.2%
QCOM	\$183.8B	19.6	34%	20.1%	+1.9%	5/9	+7.1%
KLAC	\$216.3B	45.0	87%	37.3%	+11.7%	7/9	+51.7%
ARM	\$243.3B	234.8	13%	20.9%	+25.1%	7/9	+33.1%
TXN	\$252.5B	41.8	35%	36.2%	+16.7%	7/9	—
AMAT	\$324.8B	35.1	41%	27.8%	+7.8%	6/9	—
LRCX	\$330.3B	45.6	65%	33.9%	+26.0%	8/9	—
INTC	\$475.0B	-42.6	-12%	-68.4%	+7.5%	7/9	—

1-yr returns computed from adjusted price history; peers without a tracked series show —.

29 ANALYST CONSENSUS & ESTIMATES live consensus

Buy

54 Analysts

MEAN TARGET (QTR)
\$482.56
9 targets

TARGET VS. PRICE
+22.0%
last-quarter mean

NEXT REPORT
2026-11-24
street \$3.89

CONSENSUS ESTIMATES	REVENUE MEAN	HIGH / LOW	EPS MEAN	HIGH / LOW	# EPS EST.
FY2026	\$15.11B	\$15.14B / \$15.10B	\$12.86	\$14.05 / \$12.72	19
FY2027	\$18.50B	\$21.02B / \$17.76B	\$16.73	\$17.33 / \$14.98	19
FY2028	\$20.64B	\$26.68B / \$18.71B	\$19.74	\$21.86 / \$16.56	9

30 STREET TARGETS & THIRD-PARTY RATING live targets + composite

Street Price Target — Trajectory

WINDOW	AVG TARGET	VS. PRICE	# TARGETS
Last Quarter	\$482.56	+22.0%	9
Last Year	\$400.80	+1.4%	71
All Time	\$319.67	-19.2%	129

Rolling mean of published targets vs. last close \$395.44. Aggregated from StreetInsider, Benzinga, Pulse 2.0.

Third-Party Composite Rating

B

DCF 3/5

ROE 3/5

ROA 4/5

DEBT/EQ 2/5

P/E 2/5

P/B 2/5

Independent quant composite as of 2026-10-16; components scored 1-5 (5 best). Shown for contrast with the InsiderStreet Score — methodologies differ.

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31 PRICE PERFORMANCE — INDEXED, 12 MO

live prices · benchmark + sector + peer set

ADI +65.7% vs S&P 500 +15.9% — spread +49.8pp



All series indexed to 100 at the start of the window, adjusted closes.

TECHNICAL CHART — 6-MONTH DAILY CANDLES, INDICATORS ON

site chart, print edition

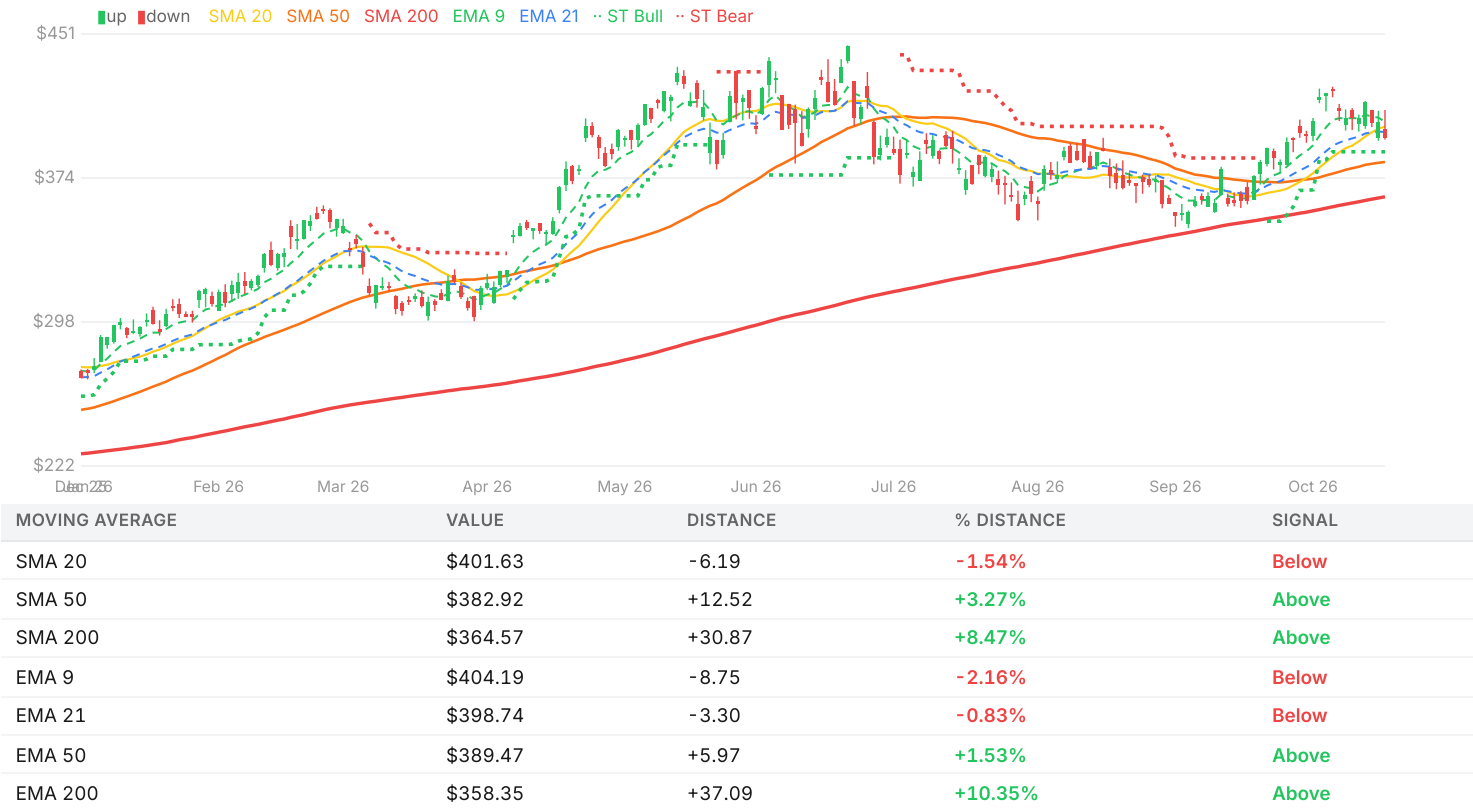


Candlesticks with SMA 20/50 overlay, Bollinger (20,2σ) band, volume, and Wilder RSI(14) — computed from live daily OHLCV.

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MOVING AVERAGE RIBBON & TREND

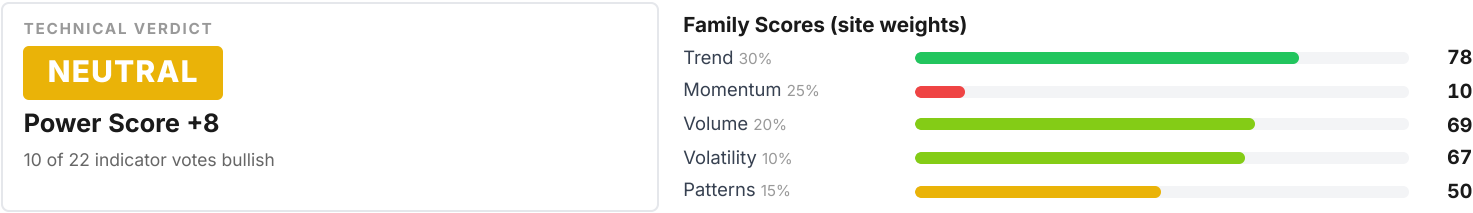
site technicals-tab chart, live indicator history



Series and readings from the nightly technical-indicator history — identical data to the site's ribbon chart. Supertrend segments colored by direction.

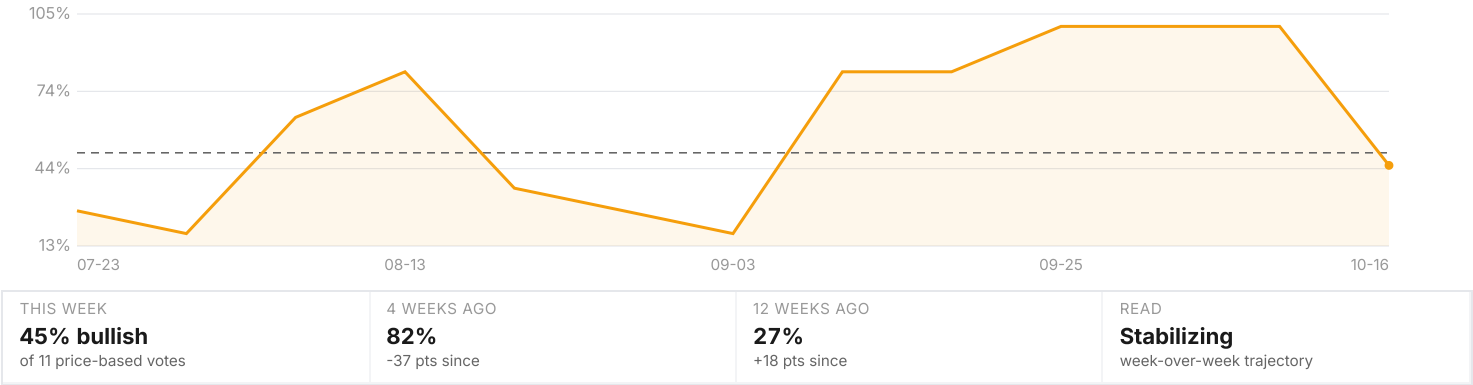
32 TECHNICAL POWER SCORE

EDGE · site engine · 54/100 composite



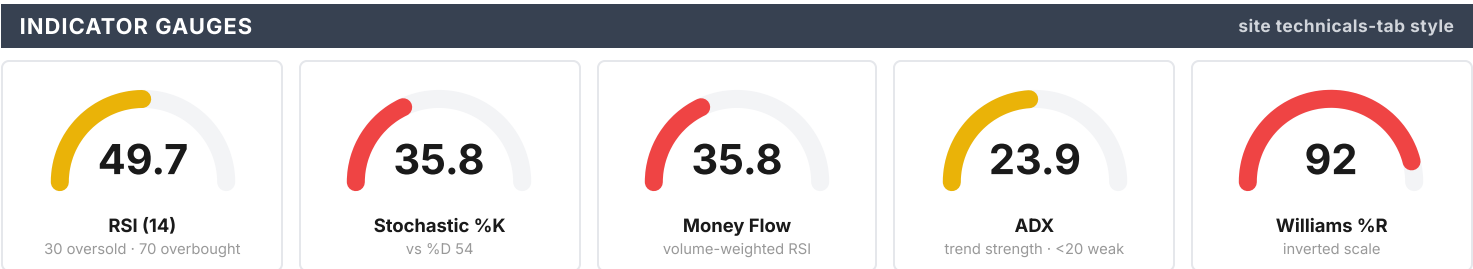
NEUTRAL — BUT WHICH WAY IS IT TRENDING?

vote share recomputed weekly, 13 weeks



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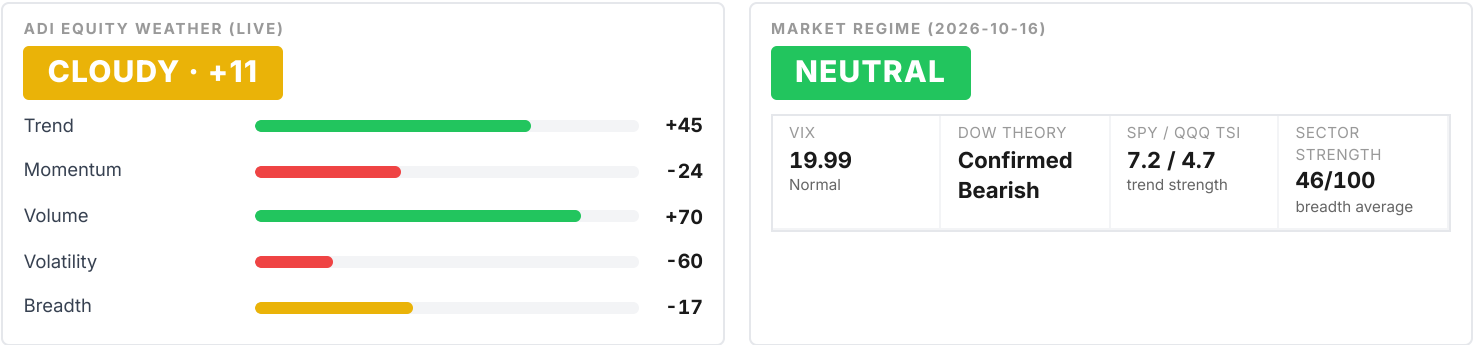
INDICATOR VOTE GRID				10 bull / 12 bear	
● Price vs SMA 20	\$401.63	● Price vs SMA 50	\$382.92	● Price vs SMA 200	\$364.57
● EMA 9/21 Cross	404.2/398.7	● SMA 50/200	Golden	● ADX Direction	ADX 24
● Supertrend	\$388	● Parabolic SAR	\$415	● SMA Slope	0.990
● RSI	49.7	● Stochastic K/D	36/54	● StochRSI K/D	0/14
● Williams %R	-92	● CCI	-2	● TSI vs Signal	19.7
● CMO	-0.5	● ROC	-5.20%	● OBV Signal	Accum
● Chaikin MF	0.250	● MFI	36	● Force Index	-8M
● Elder Ray Bull	11.67				



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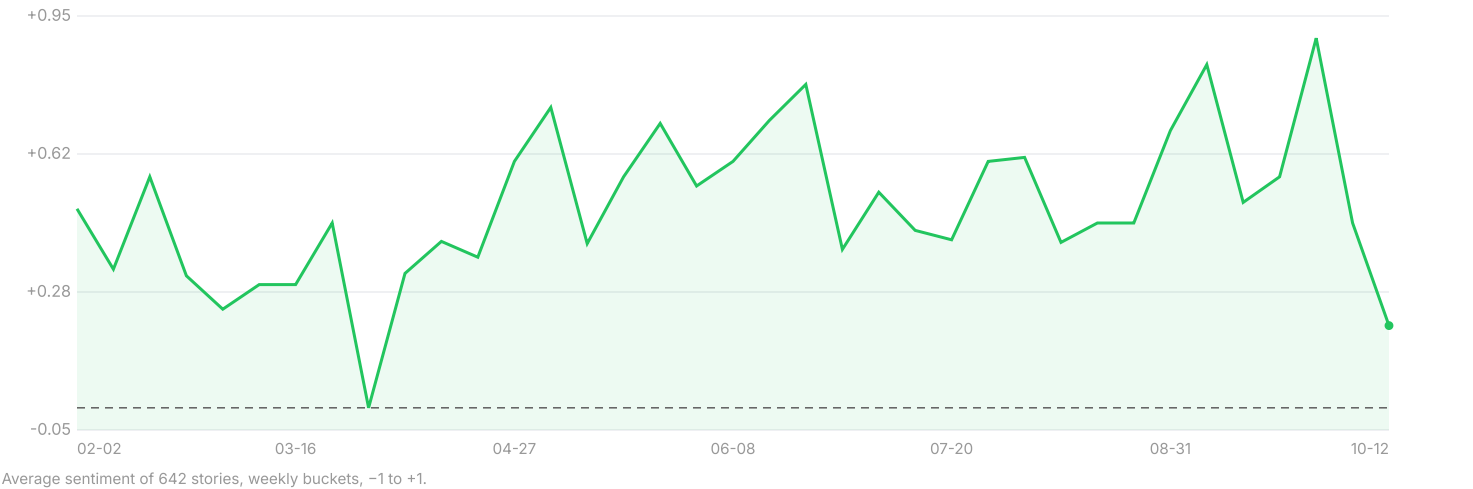
36 EQUITY WEATHER & MARKET REGIME

EDGE · live weather engine



37 NEWS SENTIMENT — WEEKLY

live Glauxie-scored feed



38 WEATHER - COMPANY VS INDUSTRY, SECTOR, UNIVERSE

EDGE · live weather engine · Cloudy

OVERALL +10.6 +44.3 vs industry		TREND +44.8 +77.9 vs industry		MOMENTUM -24.4 +34.7 vs industry		VOLUME +70.0 +95.6 vs industry			
READING		ADI		SEMICONDUCTORS N=871		TECHNOLOGY N=6,969		ALL US SYMBOLS N=70,435	
Overall		+10.6		-33.7		-20.7		-20.5	
Trend		+44.8		-33.2		-20.8		-21.3	
Momentum		-24.4		-59.0		-28.5		-15.8	
Volume		+70.0		-25.6		+0.0		-3.8	

Trend, momentum and volume are computed per company. Volatility and breadth are market-regime values shared by every symbol in the universe, so they are reported once under Market Regime rather than compared here - a company cannot differ from its sector on a constant.

39 EXECUTIVE COMPENSATION

live proxy data · FY2025

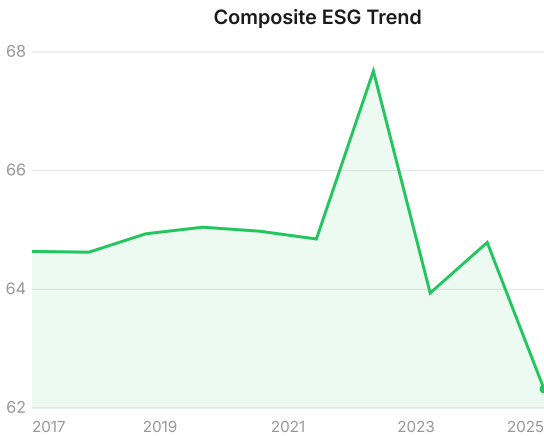
EXECUTIVE	TOTAL COMP	STRUCTURE
Vincent Roche Chief Executive Officer and Ch	\$27.5M	94% equity+incentive
Richard C. Puccio, Jr. Executive Vice Presid	\$7.8M	90% equity+incentive
Vivek Jain Executive Vice President, Global	\$7.7M	90% equity+incentive
Martin Cotter Senior Vice President, Vertica	\$6.4M	90% equity+incentive
Katsu Nakamura Senior Vice President and Chi	\$4.9M	78% equity+incentive

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40 ESG ASSESSMENT

live disclosure-derived scores

PILLAR (LIVE DISCLOSURE SCORES)	SCORE
Environmental	56
Social	65
Governance	65
Composite ESG	62



41 8-K MATERIAL EVENTS

live EDGAR feed

FILED	8-K CONTENTS	ITEMS
2026-09-17	Material Agreement; Exhibits	1.01,9.01
2026-09-09	Regulation FD; Exhibits	7.01,9.01
2026-08-19	Earnings Release; Exhibits	2.02,9.01
2026-07-29	Other Events	8.01
2026-07-02	Material Agreement; Financial Obligation; Exhibits	1.01,2.03,9.01
2026-05-20	Earnings Release; Exhibits	2.02,9.01
2026-05-19	Regulation FD; Exhibits	7.01,9.01
2026-03-12	Departure/Election of Directors; Appointment of Officers; Submission o	5.02,5.07,9.01

42 METHODOLOGY

Methodology. Every figure originates in InsiderStreet's production data layer and is computed deterministically by the same engines that power insiderstreet.ai. This factsheet contains no model-written text. Sections without underlying data are omitted rather than estimated.

43 DISCLOSURES

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44 DATA PROVENANCE FOR THIS REPORT			sources · coverage · method
DATA DOMAIN	SOURCE	COVERAGE FOR THIS REPORT	
Price & volume	market_db.historical_prices	52 rows	
Fundamentals	income_statements_annual	6 rows · 2020 to 2025	
Reported vs consensus	fact/earnings_calendar	24 rows · 2020-11-24 to 2026-08-19	
Analyst estimates	dim/forward_estimates	3 rows · 2026-11-01 to 2028-11-01	
Institutional ownership (13F)	holdings_db.institutional_ownership_summary	114 rows · 1998 to 2026	
Insider transactions (Form 4)	edgar/form4	12 rows · 2026-10-06 to 2026-10-12	
Proposed sales (Form 144)	edgar/form144	1 record	
Beneficial ownership (13D/G)	edgar/13dg	4 rows · 2025-03-06 to 2026-03-26	
Short-sale volume (FINRA)	edgar/short_volume_daily	60 rows · 2026-07-23 to 2026-10-15	
Dark pool (ATS, tier 1)	edgar/darkpool_weekly	12 rows · 2026-06-15 to 2026-08-31	
ETF & fund holding	etf_holdings_changelog (30d)	1 record	
Peer set	stock_peers_dynamic	8 rows	
Industry medians	industry_medians	1 record	
Congressional trades	congress_db (House + Senate)	1 record	
ESG	fact/esg_disclosures	1 record	

Method. Every figure in this factsheet is looked up from a named field computed in code. It contains no model-written text.

Not covered. Short interest as a percent of float and days-to-cover are not in this data set — the short-sale figures above are FINRA volume, a flow, and cannot support squeeze or covering analysis. Options positioning and intraday data are also absent. 13F ownership is filed 45 days after quarter end and congressional trades are disclosed on a lag, so both describe a past position, not a current one.