

Hubbell Incorporated (HUBB)

Industrials / Electrical Equipment & Parts · New York Stock Exchange

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

LAST CLOSE \$461.10 2026-10-16	MARKET CAP \$24.4B VOLUME 0.4M	52-WK HIGH \$565.50 52-WK LOW \$403.82	TRAILING PE 27.2 P/S 3.91	GROSS MARGIN 35.2% NET MARGIN 14.5%	ROE 24% ROIC 10%	PIOTROSKI 6/9 ALTMAN Z 3.3	1-YR RETURN +7.9% 5-YR RETURN +307.9%
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Hubbell, Inc. engages in the designing, manufacturing, and sale of electrical and electronic products for non-residential and residential construction, industrial, and utility applications. It operates through the Electrical Solutions and Utility Solutions segments. The Electrical Solutions segment manufactures and sells wiring and electrical, lighting fixtures, and controls for indoor and outdoor applications as well as specialty lighting and communications products. The Utility Solutions segment is involved in the design, manufacture, and sale of electrical distribution, transmission, substation, and telecommunications products. The company was founded by Harvey Hubbell II in 1888 and is headquartered in Shelton, CT.

SECTOR Industrials INDUSTRY Electrical Equipment & Parts EXCHANGE NYSE MARKET CAP \$24.4B EMPLOYEES 18,000 (SEC-filed)
CEO Gerben Wilhelm Marinus Bakker IPO 1972-06-05 COUNTRY US
40 Waterview Drive, Shelton, CT 06484 · Tel 475 882 4000 · [hubbell.com](https://www.hubbell.com)

1 INSIDERSTREET SCORE

INSIDERSTREET SCORE

62 / 100

Street mean \$575.14 (7 analysts, last qtr) — their number, not ours

INSIDER CONSENSUS SIGNAL

ROUTINE SELLING — LOW SIGNAL

\$0M sold / 6 mo, zero open-market buys

2 INSIDERSTREET SCORE

live IS factor model

INSIDERSTREET
SCORE
62
OF 100

Score Breakdown

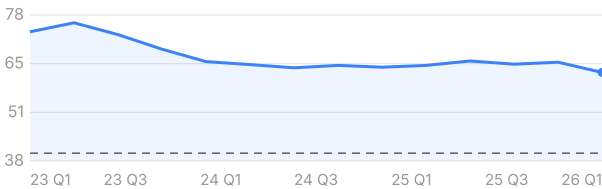
Profitability	63/100
Growth	55/100
Momentum	79/100
Quality	68/100
Earnings Quality	76/100
Balance Sheet	48/100
Value	42/100
Risk (safety)	90/100
Overall	62.3/100

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
NVT	65
AME	70
BE	73
AYI	76
VRT	79
ENS	67
HUBB	62

IS Score Trend — quarterly



14 quarters, 23 Q1 to 26 Q2. Peak 76 in 23 Q2, latest 62 — -14 since. Fell in 2 of the last 4 quarters. Dashed line marks 40 on the 0-100 scale.

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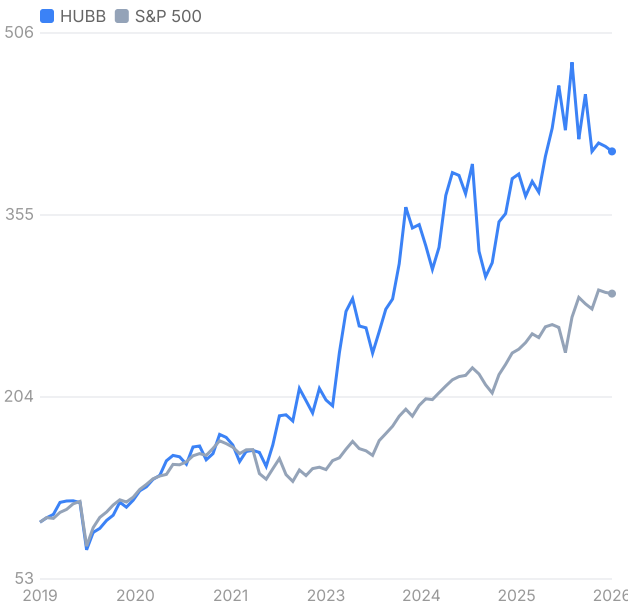
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3 PRICE AND VOLUME adjusted close, prod data layer

1 Year vs S&P 500 · HUBB +7.9% · S&P 500 +15.9% · spread -8.0pp



7 Years vs S&P 500 · HUBB +307.9% · S&P 500 +189.9% · spread +118.0pp



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.

4 TWO READINGS business vs price

BUSINESS QUALITY

62 / 100

IS Score 62.3 / 100 · -13.7 from peak of 76

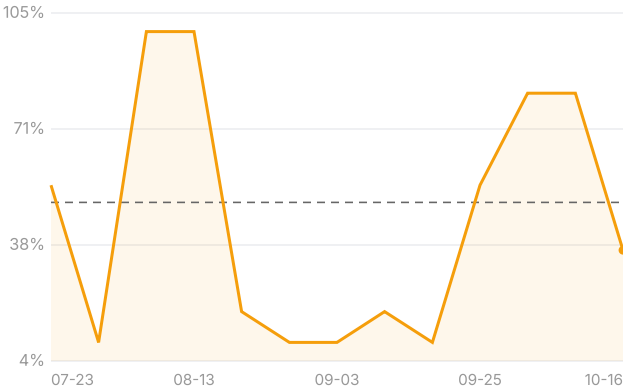


Fundamental factor model, quarterly. Measures how the business is doing - not where the price is going.

PRICE STRUCTURE

BEARISH

Technical Score 32 / 100 · Power -36 · 5 of 22 indicator votes bullish



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

These two disagree — business quality 62, price structure 32 out of 100, so the business reads better than the price does. We publish the disagreement rather than resolving it: they answer different questions, and the gap between them is information, not an error.

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 62.3	would move us up one band
IS Score stops falling - one quarter higher than the prior	last four: 65 → 65 → 65 → 62	the direction matters more than the level
Technical vote share back above 50%	now 36%	price structure no longer broken
Institutional holder count rises two quarters running	peak 1,025 → now 1,025	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.

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.

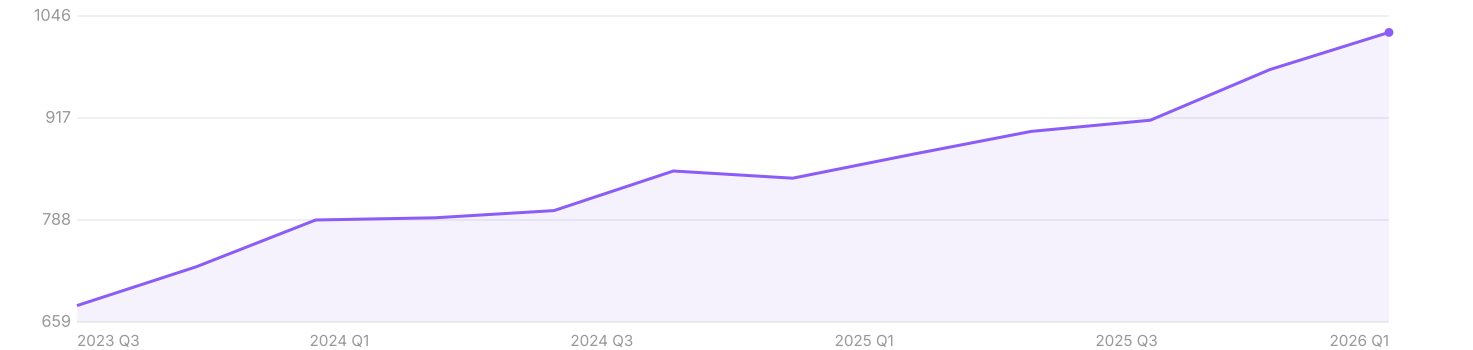
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6 SMART MONEY CONFLUENCE				EDGE · disclosure sources
SITE CONVERGENCE SCORE 3 of 4 top 4% of 29,420 symbols	SOURCES ALIGNED — of 3 independent disclosures	CONGRESS (180D) 46 buys 2026-09-04	INSIDER BUYS (180D) 0 none disclosed	
ETF FUNDS (30D) 979 up / 800 down net +179 funds	INSTITUTIONS ADDED (13F) 47 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
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Institutions holding — 12 quarters



Peak 1,025 · latest 1,025 (+0 from peak).

QUARTER	HOLDERS	13F SHARES	VALUE	REPORTED OWN%
2026 Q2	1,025	51.4M	\$26.4B	96.7%
2026 Q1	978	51.1M	\$24.6B	96.1%
2025 Q4	914	52.0M	\$22.3B	97.8%
2025 Q3	900	50.3M	\$21.0B	94.7%
2025 Q2	871	51.3M	\$20.1B	96.5%
2025 Q1	841	49.6M	\$15.9B	93.3%
2024 Q4	850	49.9M	\$20.1B	94.0%
2024 Q3	800	51.8M	\$20.5B	97.5%
2024 Q2	791	48.7M	\$17.1B	91.7%
2024 Q1	788	48.3M	\$19.0B	90.9%
2023 Q4	729	47.5M	\$14.9B	89.4%
2023 Q3	680	46.9M	\$13.8B	88.2%

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.

8 INSIDER ACTIVITY							live Form 4 data
INSIDER	ROLE	DATE	TYPE	SHARES	VALUE	POST-TXN OWNED	
Mikes Mark Eugene	EVP, Pres Electrical Solutions	2026-09-15	A-Award	1,133	—	4,372	
Mikes Mark Eugene	EVP, Pres Electrical Solutions	2026-09-15	A-Award	4,273	\$1.89M	4,273	
Lind Bonnie Cruickshank	director	2026-08-14	A-Award	66	—	2,962	
Keating Neal J.	director	2026-08-14	A-Award	32	—	7,934	
Guzzi Anthony	director	2026-08-14	A-Award	77	—	33,719	
Del Nero Jonathan M.	Vice President, Controller	2026-08-11	SELL	547	\$0.28M	2,933	
Mikes Mark Eugene	President Electrical Solutions	2026-07-06	TAX W/H	207	\$0.10M	3,239	
Gumbs Gregory	President, Utility Solutions	2026-07-06	TAX W/H	415	\$0.21M	2,952	

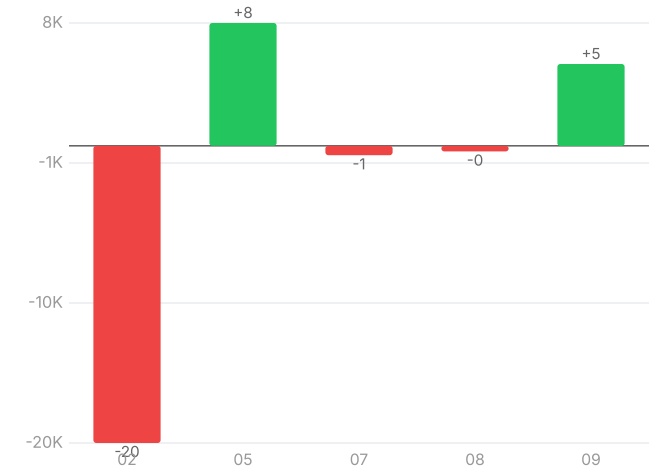
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9 SELL DECOMPOSITION — ROUTINE VS. DISCRETIONARY

EDGE

6-MO DECOMPOSITION (FORM 4)	TXNS	SHARES	VALUE	SIGNAL WEIGHT
S — Open-market sales	1	547	\$0.3M	Counted
F — Tax withholding	8	4,368	\$2.2M	None — compensation
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	\$0.3M 1 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
2026-08-11	Del Nero Jonathan M.	547	\$0.3M
2026-02-17	Mikes Mark Eugene	2,601	\$1.4M
2026-02-12	Sperry William R	3,733	\$1.9M
2026-02-09	Lane Katherine Anne	4,610	\$2.3M
Trailing 12 mo	10 filings	74,604	\$37M

11 13D / 13G STAKES

COND

FILED	FORM	REPORTING PERSON	% OF CLASS	SHARES
2026-04-30	SCHEDULE 13G	Vanguard Capital Management	7.50%	4.0M sh
2026-04-29	SCHEDULE 13G	Vanguard Portfolio Management	5.06%	2.7M sh
2026-03-27	SCHEDULE 13G/A	The Vanguard Group	—	exit/reporting change
2026-01-29	SCHEDULE 13G/A	Bank of New York Mellon Corp	4.10%	2.2M sh

12 CONGRESSIONAL TRADING

EDGE · STOCK Act

MEMBER	CHAMBER	TRADE	SIZE BAND	TRADED	DISCLOSED
Ro Khanna	House	BUY	\$1,001 - \$15,000	2026-09-04	2026-10-09
April Delaney	House	SELL	\$100,001 - \$250,000	2026-08-25	2026-09-10
April McClain Delaney	House	SELL	\$100,001 - \$250,000	2026-08-25	2026-09-10
Markwayne Mullin	Senate	SELL	\$1,001 - \$15,000	2024-01-04	2025-08-13
Markwayne Mullin	Senate	SELL	\$1,001 - \$15,000	2024-01-04	2025-08-12
Markwayne Mullin	Senate	SELL	\$1,001 - \$15,000	2024-01-04	2025-08-11

HOUSE 12-MO 49 trades 46 purchases	SENATE 12-MO 0 trades None purchases	COVERAGE STOCK Act filings 30-45 day disclosure lag	
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13 INSTITUTIONAL OWNERSHIP & 13F FLOW live 13F data

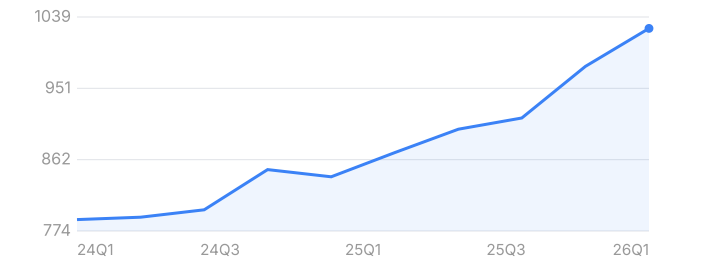
13F FILERS (LAST COMPLETE Q) 978	13F SHARES 51M 96.1% of shares out	NEW / CLOSED 134 / 53 positions, QoQ	INCREASED / REDUCED 354 / 309 positions, QoQ
PUT/CALL (13F) 1.62 option positions	FREE FLOAT 99.6% 53M sh		

2.8 · Largest Reporting 13F Managers

MANAGER	SHARES	VALUE
Fort Washington Investment Advisor	135,619	\$62M
Vontobel Holding Ltd.	77,301	\$35M
Tema Etf's Llc	72,577	\$33M
Valley Wealth Managers, Inc.	54,375	\$25M
Boston Common Asset Management, LI	46,350	\$21M
Gateway Investment Advisers Llc	34,665	\$16M

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

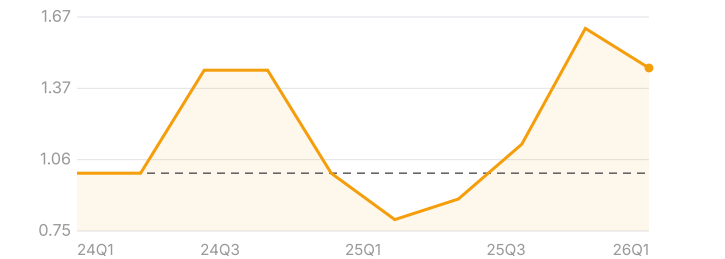
13F Filers Holding HUBB — quarterly



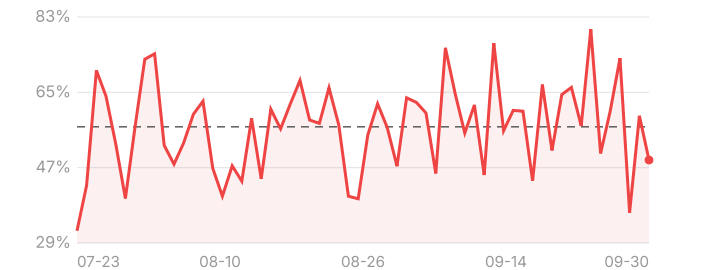
2.9 · Top ETF & Fund Ownership

FUND	WEIGHT	POSITION
VITSX	0.0%	\$759M
VTI	0.0%	\$759M
VTSAX	0.0%	\$759M
VSMPX	0.0%	\$759M
VFFSX	0.0%	\$629M
VFIAX	0.0%	\$629M

Institutional Put/Call — quarterly



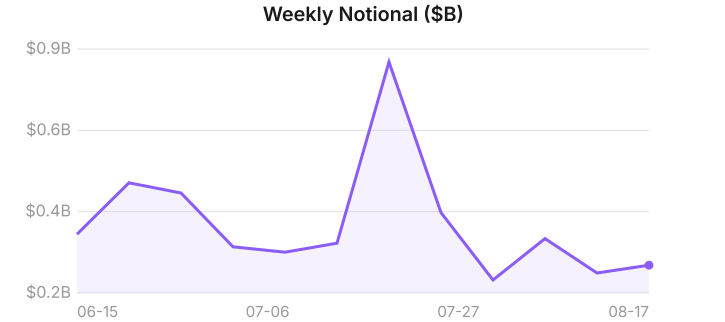
14 SHORT VOLUME — DAILY, 60 SESSIONS EDGE · live FINRA feed



Daily short-sale volume as % of volume reported in FINRA's short-sale file — a flow measure, not short interest; dashed = 50-day average.

LATEST SESSION 48.9% 2026-10-15	20-DAY AVG 58.8% 50-day 56.9%	TREND Rising 20d vs 50d	BY MARKET CENTER Q: 48% · N: 58% · B: 57% latest session
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15 DARK POOL ACTIVITY EDGE · live ATS data



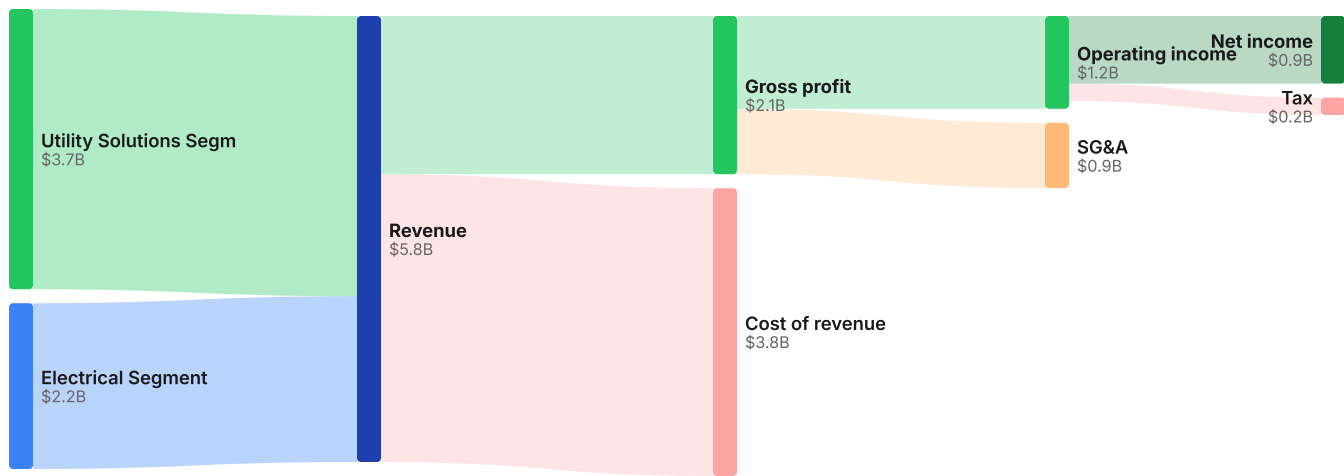
Where HUBB Trades in the Dark

ATS VENUE (4-WK)	SHARES	AVG TRADE
Sgmt Sigma X2	0.7M	19 sh
Mlix Instinct X	0.5M	29 sh
Ebxl Level Ats	0.5M	11 sh
Cgxs Onechronos	0.4M	31 sh
Ubsa Ubs Ats	0.3M	28 sh
Mspl Ms Pool (Ats-4)	0.3M	78 sh

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16 REVENUE FLOW — FY2025

live segmentation + income data



Where a dollar of Hubbell Incorporated revenue goes. All values FY2025 filings, live.

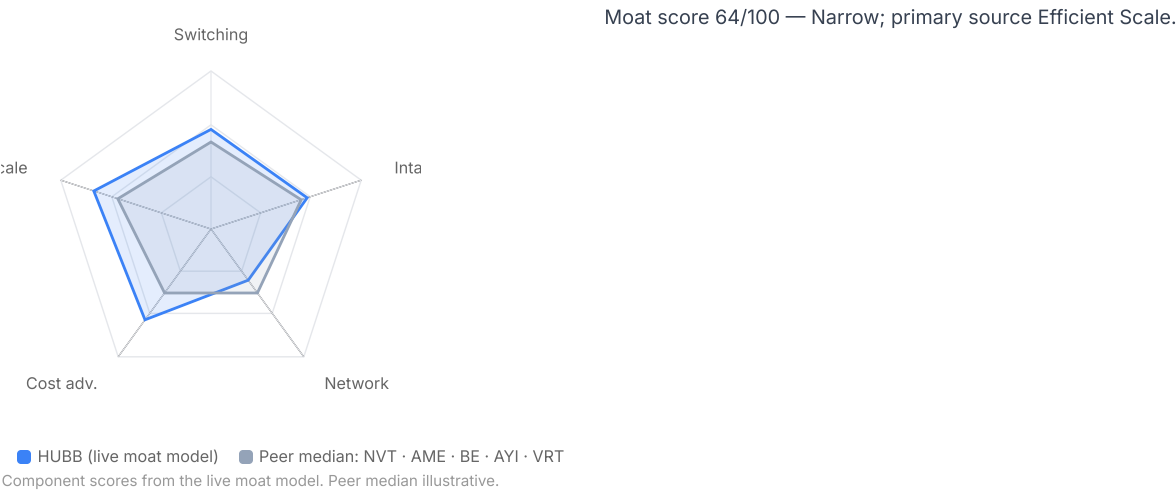
17 GEOGRAPHIC REVENUE

live segmentation

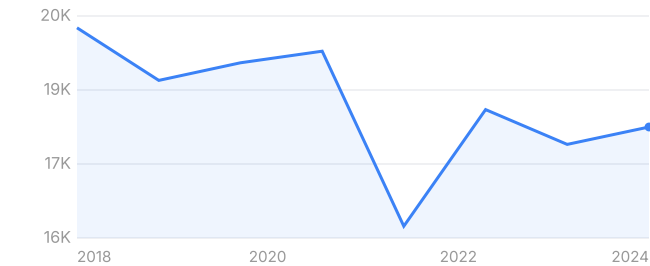
REGION	REVENUE	SHARE
Non-US	\$433M	100%

18 MOAT & COMPETITIVE POSITION

LIVE MODEL · 64/100 NARROW



3.8 · Employees (SEC filings)



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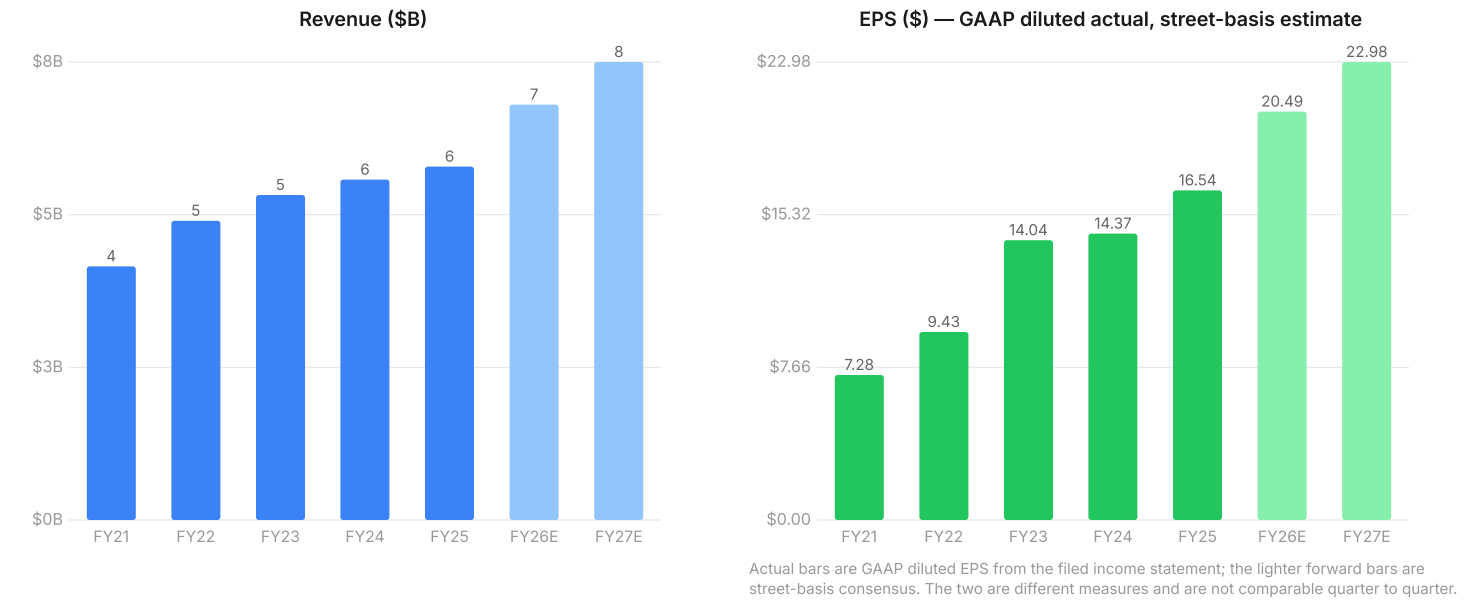
19 CORPORATE INFORMATION — KEY OFFICERS

18,000 employees

OFFICER	TITLE
Gerben W. Bakker	President, Chief Executive Officer & Chairman
William R. Sperry	Executive Vice President
Gregory A. Gumbs	President of Hubbell Utility Solutions Segment
Mark E. Mikes	President of Hubbell Electrical Solutions Segment

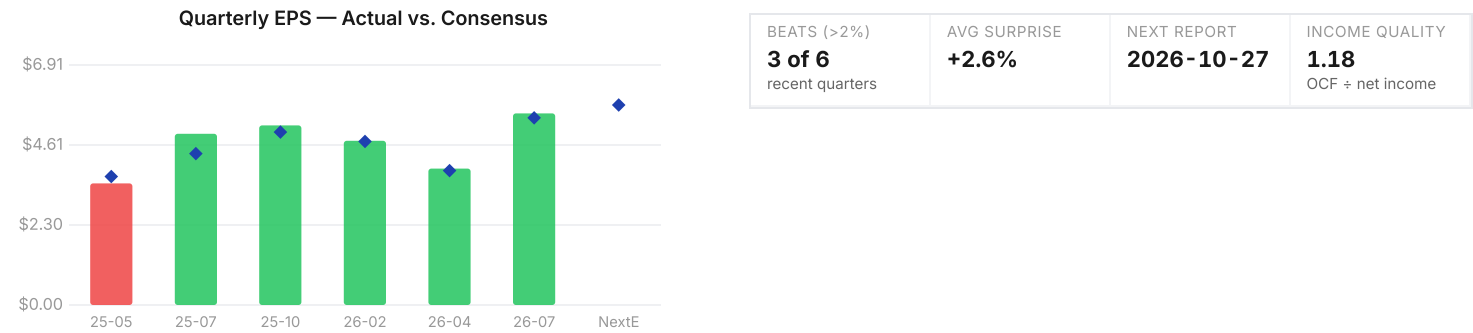
20 REVENUE & EPS — HISTORY AND ESTIMATES

live consensus



21 ESTIMATE VS. ACTUAL & SURPRISES

live data



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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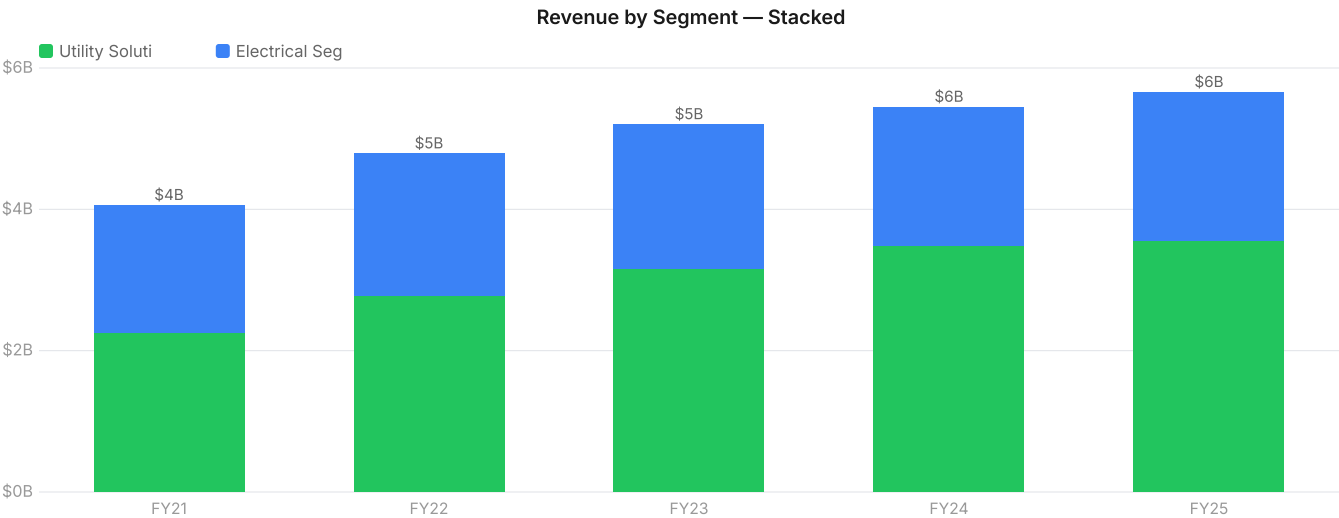
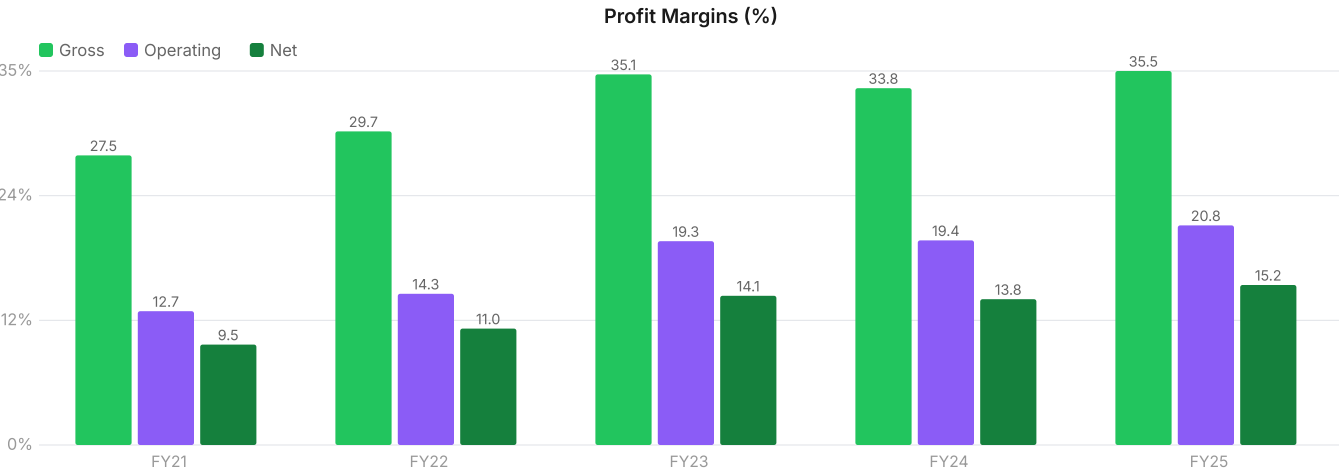
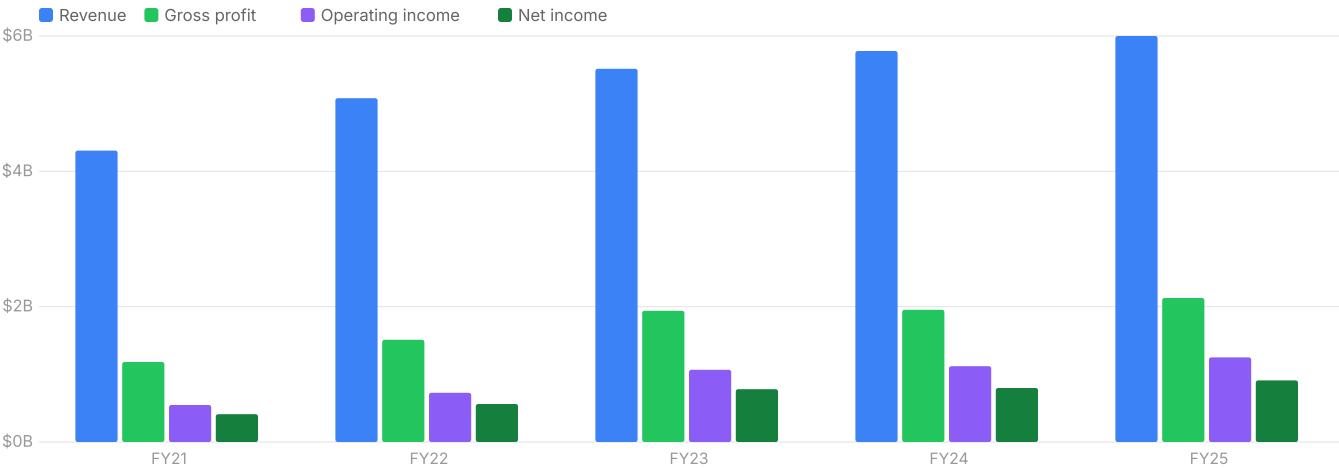
PERIOD	EPS EST.	EPS ACTUAL	EPS SURPRISE	REV EST. (\$M)	REV ACTUAL (\$M)	REV SURPRISE
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Announcement dates to . Consensus as it stood at each report. Revenue surprise shown where both estimate and actual are filed. A beat record is history, not a forecast.

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INCOME TRENDS — 5 YEARlive financials

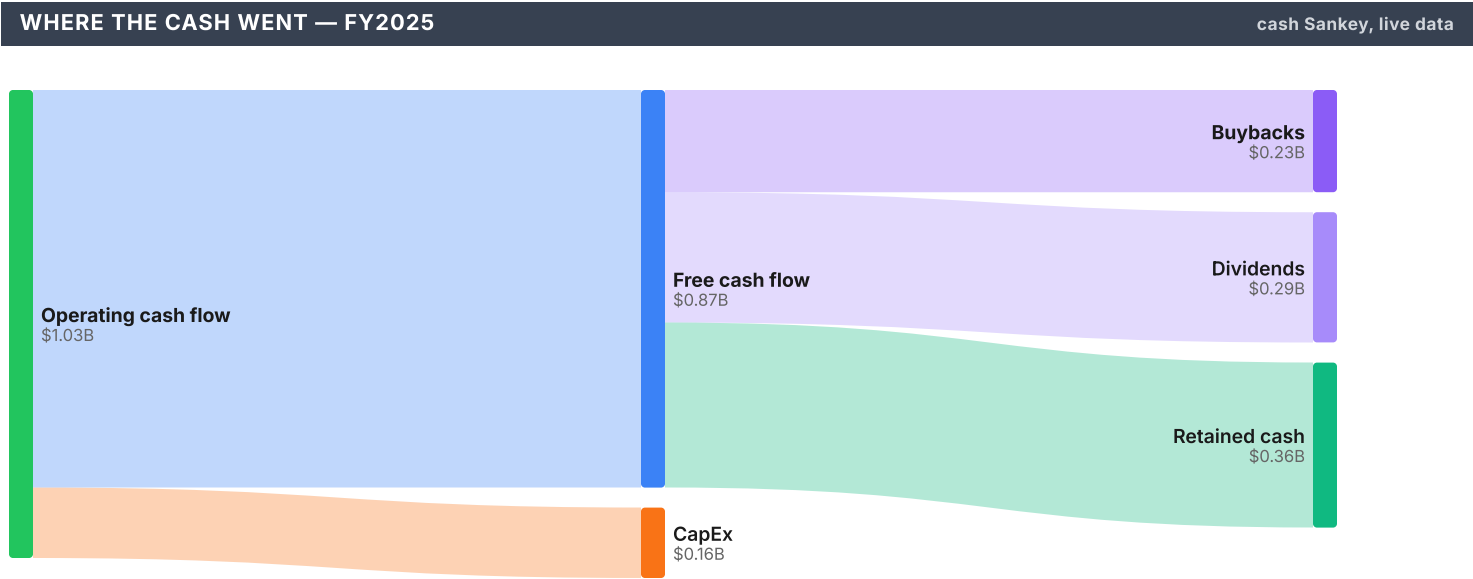
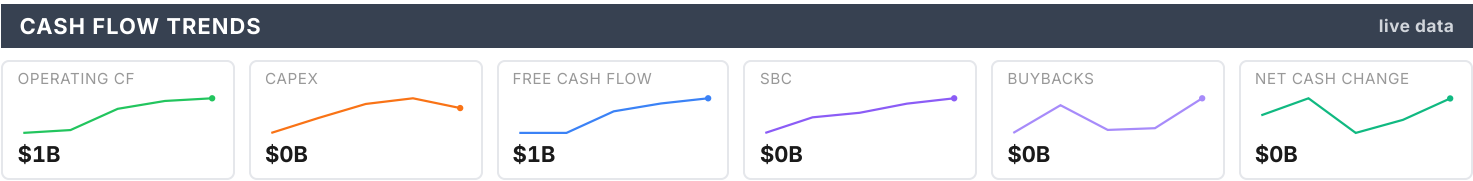


Live segmentation data.

YoY Growth Heatmap — Income Lines						
YOY GROWTH	FY21	FY22	FY23	FY24	FY25	
Revenue	+13.9%	+18.0%	+8.6%	+4.8%	+3.8%	
Gross profit	+6.1%	+27.8%	+28.3%	+0.8%	+8.9%	
Operating income	+7.6%	+33.2%	+46.5%	+5.1%	+11.5%	
Net income	+13.8%	+36.6%	+39.2%	+2.4%	+14.1%	

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23 INCOME STATEMENT — FULL						live financials
\$B · FY ENDS	FY21	FY22	FY23	FY24	FY25	TREND
Revenue	4.2	4.9	5.4	5.6	5.8	
Cost of revenue	3.0	3.5	3.5	3.7	3.8	
Gross profit	1.2	1.5	1.9	1.9	2.1	
R&D expense	0.0	0.0	0.0	0.0	0.0	
SG&A expense	0.6	0.8	0.8	0.8	0.9	
Operating income	0.5	0.7	1.0	1.1	1.2	
EBITDA	0.7	0.9	1.2	1.3	1.3	
D&A	0.1	0.1	0.1	0.2	0.1	
Pretax income	0.5	0.7	1.0	1.0	1.1	
Income tax	0.1	0.1	0.2	0.2	0.2	
Net income	0.4	0.5	0.8	0.8	0.9	
Diluted EPS (\$)	7.28	9.43	14.04	14.37	16.54	
Diluted shares (M)	55	54	54	54	54	



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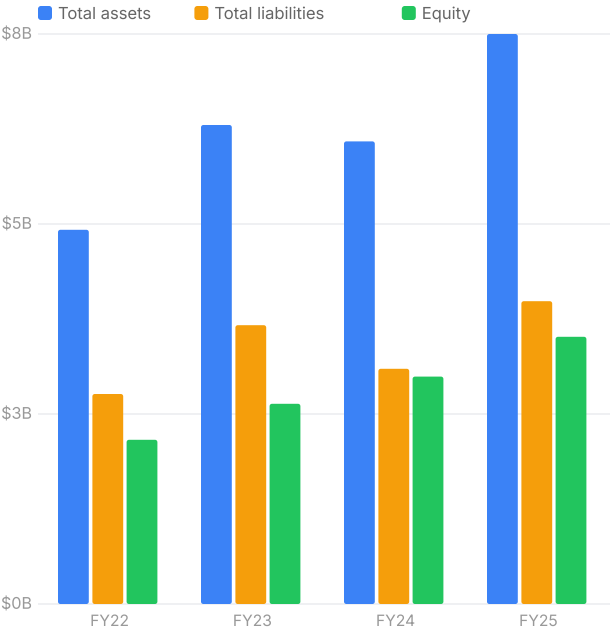
Balance Sheet — Full

\$B	FY22	FY23	FY24	FY25	
Cash & equivalents	0.4	0.3	0.3	0.5	
ST investments	0.0	0.0	0.0	0.0	
Receivables (net)	0.7	0.8	0.8	0.9	
Total current assets	2.0	2.2	2.1	2.6	
PP&E (net)	0.5	0.7	0.7	0.8	
Goodwill + intangibles	2.6	3.7	3.6	4.5	
Total assets	5.4	6.9	6.7	8.2	
Accounts payable	0.5	0.6	0.5	0.6	
Short-term debt	0.0	0.1	0.1	0.3	
Deferred revenue	0.0	0.1	0.1	0.2	
Total current liabilities	1.1	1.3	1.3	1.5	
Long-term debt	1.4	2.0	1.4	2.2	
Total liabilities	3.0	4.0	3.4	4.4	
Shareholders' equity	2.4	2.9	3.3	3.9	

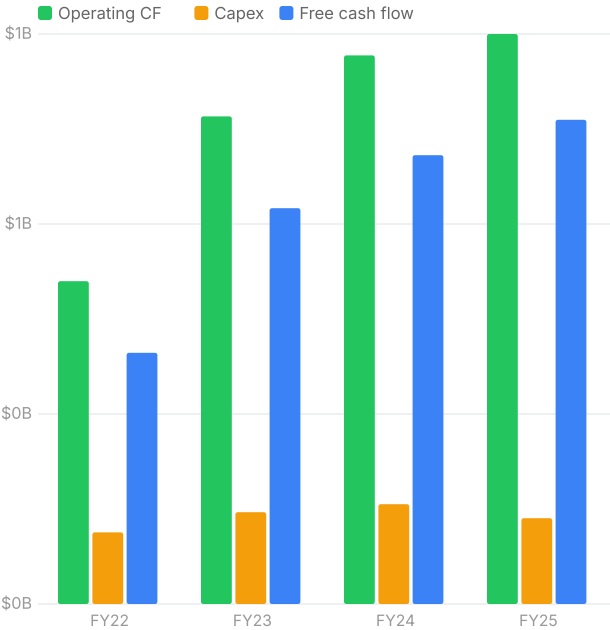
Cash Flow Statement — Full

\$B	FY22	FY23	FY24	FY25	
Net income	0.5	0.8	0.8	0.9	
D&A	0.1	0.1	0.2	0.2	
Stock-based compensation	0.0	0.0	0.0	0.0	
Working capital change	(0.0)	(0.0)	(0.0)	(0.1)	
Operating cash flow	0.6	0.9	1.0	1.0	
Capital expenditures	(0.1)	(0.2)	(0.2)	(0.2)	
Investing cash flow	0.0	(1.4)	(0.1)	(1.1)	
Buybacks	(0.2)	(0.0)	(0.0)	(0.2)	
Dividends paid	(0.2)	(0.2)	(0.3)	(0.3)	
Debt issuance / (repay)	(0.0)	0.7	(0.6)	0.8	
Financing cash flow	(0.4)	0.4	(0.9)	0.2	
Free cash flow	0.5	0.7	0.8	0.9	

Balance Sheet Structure (\$B)



Cash Generation vs Capex (\$B)



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.

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24 EXPANDED RATIO ANALYSIS (I)							live ratio engine · profitability · valuation
RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
PROFITABILITY							
ROE	17.0%	23.8%	29.0%	25.4%	25.1%	24%	
ROA	7.0%	10.2%	12.3%	11.5%	12.0%	7.6%	
ROIC	11.8%	16.1%	16.8%	18.4%	16.3%	9.6%	
Gross margin	27.5%	29.7%	35.1%	33.8%	35.5%	35.2%	
Operating margin	12.7%	14.3%	19.3%	19.4%	20.8%	20.2%	
Net margin	9.5%	11.0%	14.1%	13.8%	15.2%	14.5%	
EBITDA margin	15.8%	17.3%	21.8%	22.9%	23.0%	23.6%	
FCF margin	11.9%	9.2%	13.3%	14.4%	15.0%	—	
VALUATION							
P/E	29.38	22.27	22.79	28.56	26.62	27.2	
P/B	4.81	5.15	6.02	6.83	6.18	6.2	
P/S	2.82	2.46	3.22	3.97	4.07	3.91	
P/FCF	23.64	26.78	24.21	27.53	27.20	27.0	
EV/EBITDA	18.94	15.51	16.46	18.28	18.53	20.0	
EV/Revenue	3.14	2.68	3.58	4.21	4.43	4.7	
Earnings yield	3.4%	4.5%	4.4%	3.5%	3.8%	3.68%	
FCF yield	4.2%	3.7%	4.1%	3.6%	3.7%	3.70%	
EXPANDED RATIO ANALYSIS (II)							leverage · solvency
RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
LEVERAGE & SOLVENCY							
Current ratio	1.76	1.86	1.64	1.64	1.72	1.61	
Quick ratio	1.14	1.18	1.01	0.98	1.00	0.93	
Debt / equity	0.69	0.66	0.80	0.53	0.68	1.37	
Debt / assets	29.0%	28.8%	33.1%	25.7%	31.7%	45.4%	
Net debt / EBITDA	1.96	1.29	1.66	1.06	1.51	3.40	
Interest coverage	8.99	14.25	27.79	14.69	18.59	—	

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EXPANDED RATIO ANALYSIS (III)							efficiency · growth · per-share · scores
RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
EFFICIENCY							
Asset turnover	0.73	0.93	0.87	0.83	0.78	0.53	
Receivables turnover	6.44	7.22	7.28	7.56	7.35	5.4	
DSO (days)	57	51	50	48	50	67	
DPO (days)	58	56	57	54	54	59	
Cash conversion cycle	78	68	75	76	89	123	
GROWTH (YoY)							
Revenue growth	-9.1%	30.1%	8.6%	4.8%	3.8%	—	
Net income growth	3.9%	49.6%	39.2%	2.9%	14.3%	—	
EPS growth	3.5%	51.8%	39.2%	2.9%	15.2%	—	
FCF growth	-18.9%	0.1%	57.5%	13.4%	7.9%	—	
PER SHARE (\$)							
EPS (diluted, TTM)	6.66	10.11	14.07	14.48	16.68	16.97	
Book value / share	40.69	43.72	53.28	60.52	71.84	73.80	
Revenue / share	69.42	91.63	99.50	104.23	109.11	117.08	
FCF / share	8.28	8.41	13.24	15.01	16.33	16.96	
Cash / share	5.39	8.42	6.46	6.39	9.30	7.43	
SHAREHOLDER RETURN & SCORES							
Buyback yield	0.1%	1.5%	0.2%	0.2%	0.9%	0.73%	
Altman Z-Score	4.01	4.66	4.64	6.23	5.32	3.3	
Piotroski F-Score	7	9	6	8	7	6/9	
Beneish M-Score	-2.20	-2.29	-2.46	-2.65	-2.40	-2.08	

25 EARNINGS QUALITY PANEL				live scores
MODEL	SCORE	ZONE	NOTE	
Piotroski F-Score	6 / 9	Middling		
Altman Z-Score	3.3	Safe (>2.99)	Safe	
Income quality	1.18	Cash-backed	OCF ÷ net income	
Beneish M-Score	-2.08	Elevated	vs -2.22 threshold	

26 DUPONT & GROWTH QUALITY				live analysis engine
DUPONT DECOMPOSITION (TTM)		VALUE	GROWTH QUALITY (LIVE)	VALUE
Tax burden		0.80	Revenue stability	0.96
Interest burden		0.92	Earnings stability	0.99
Operating margin		19.8%	Earnings persistence	0.97
Asset turnover		0.66×	Revenue CAGR 3y	6.3%
Financial leverage		2.56×	EPS CAGR 3y	13.0%
= ROE		24%	FCF CAGR 3y	12.2%

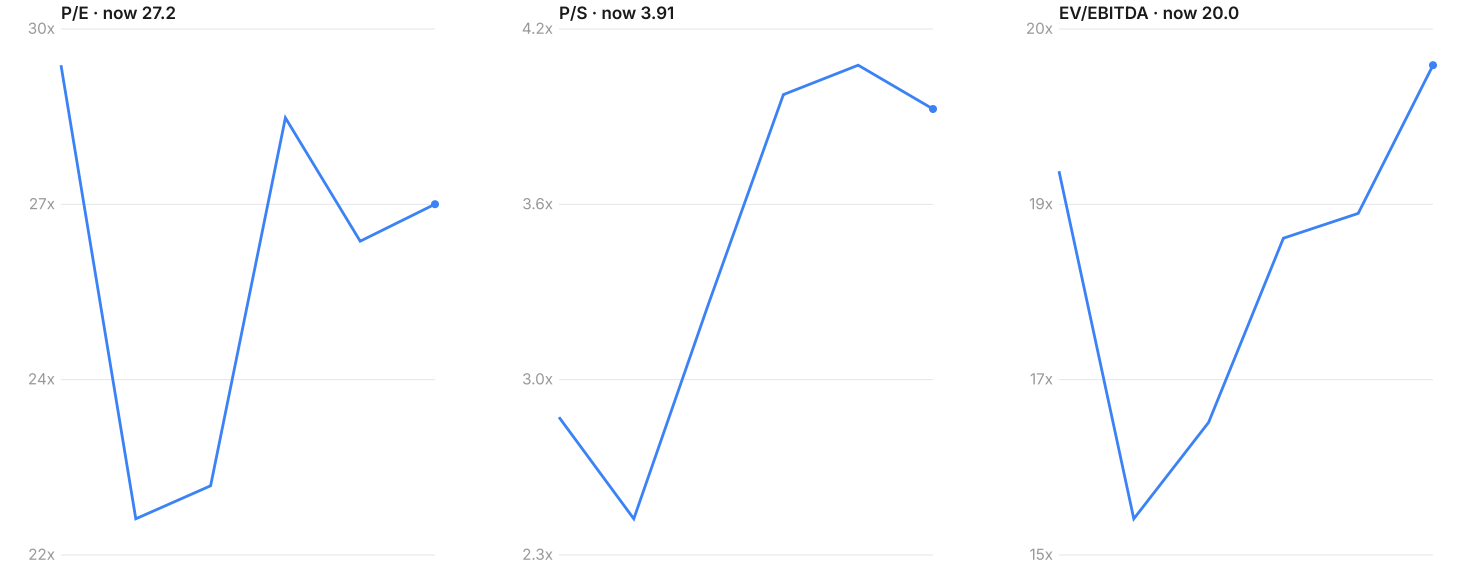
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SHAREHOLDER RETURN PROFILE live

BUYBACK YIELD 0.73%	DIVIDEND YIELD 1.23%	TOTAL SHAREHOLDER RETURN 1.79% cash yield	SBC / REVENUE 0.4% 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
NVT	\$23.0B	38.5	16%	14.7%	+46.2%	6/9	+41.5%
AME	\$56.9B	36.1	15%	19.9%	+12.7%	8/9	+35.3%
BE	\$65.2B	264.8	22%	18.4%	+91.0%	6/9	+92.3%
AYI	\$9.1B	17.3	19%	13.9%	+6.8%	8/9	-15.9%
VRT	\$79.5B	45.7	44%	15.2%	+26.2%	6/9	—
ENS	\$6.1B	17.7	18%	12.4%	+3.7%	8/9	—
POWL	\$6.0B	31.5	28%	16.7%	+7.0%	3/9	—
ETN	\$152.0B	39.7	20%	9.6%	+15.5%	5/9	—

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

29 ANALYST CONSENSUS & ESTIMATES live consensus

Hold

17 Analysts



MEAN TARGET (QTR) \$575.14 7 targets	TARGET VS. PRICE +24.7% last-quarter mean	NEXT REPORT 2026-10-27 street \$5.76
---	--	---

CONSENSUS ESTIMATES	REVENUE MEAN	HIGH / LOW	EPS MEAN	HIGH / LOW	# EPS EST.
FY2026	\$6.87B	\$6.89B / \$6.86B	\$20.49	\$20.56 / \$20.41	7
FY2027	\$7.57B	\$7.63B / \$7.46B	\$22.98	\$23.63 / \$22.54	7
FY2028	\$8.05B	\$8.48B / \$7.83B	\$25.43	\$27.00 / \$23.80	3

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30 STREET TARGETS & THIRD-PARTY RATING

live targets + composite

Street Price Target — Trajectory

WINDOW	AVG TARGET	VS. PRICE	# TARGETS
Last Month	\$580.20	+25.8%	5
Last Quarter	\$575.14	+24.7%	7
Last Year	\$535.67	+16.2%	24
All Time	\$450.82	-2.2%	45

Rolling mean of published targets vs. last close \$461.10. Aggregated from StreetInsider, Benzinga, Pulse 2.0.

Third-Party Composite Rating

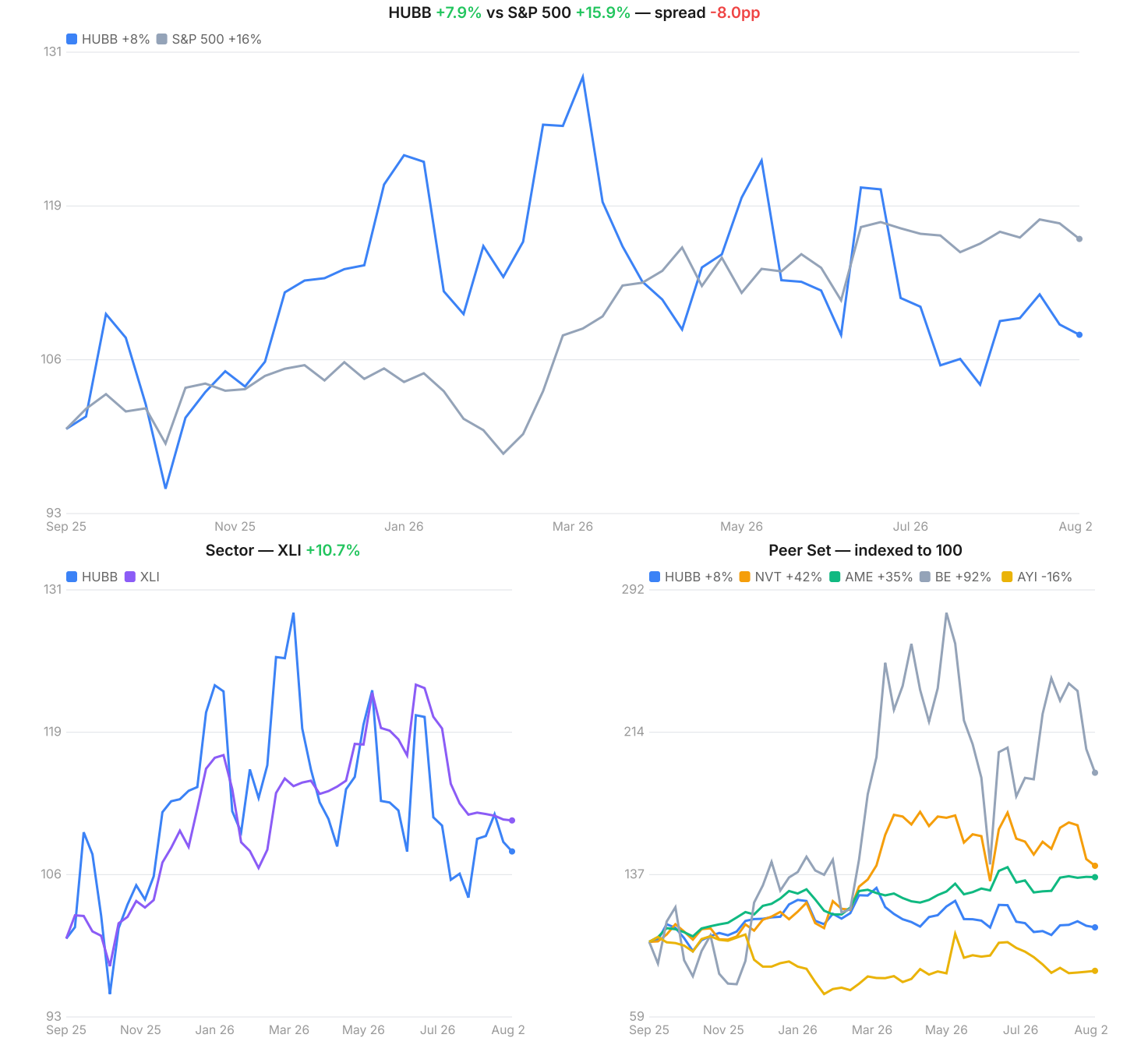
B

DCF4/5ROE5/5ROA4/5DEBT/EQ1/5P/E2/5P/B1/5

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

31 PRICE PERFORMANCE — INDEXED, 12 MO

live prices · benchmark + sector + peer set



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

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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.

MOVING AVERAGE RIBBON & TREND

site technicals-tab chart, live indicator history



MOVING AVERAGE	VALUE	DISTANCE	% DISTANCE	SIGNAL
SMA 20	\$468.78	-7.68	-1.64%	Below
SMA 50	\$469.58	-8.48	-1.81%	Below
SMA 200	\$488.82	-27.72	-5.67%	Below
EMA 9	\$469.80	-8.70	-1.85%	Below
EMA 21	\$468.36	-7.26	-1.55%	Below
EMA 50	\$470.40	-9.30	-1.98%	Below
EMA 200	\$474.36	-13.26	-2.80%	Below

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

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32 TECHNICAL POWER SCORE

EDGE · site engine · 32/100 composite

TECHNICAL VERDICT

BEARISH

Power Score -36

5 of 22 indicator votes bullish

Family Scores (site weights)

Trend 30%

Momentum 25%

Volume 20%

Volatility 10%

Patterns 15%

33

20

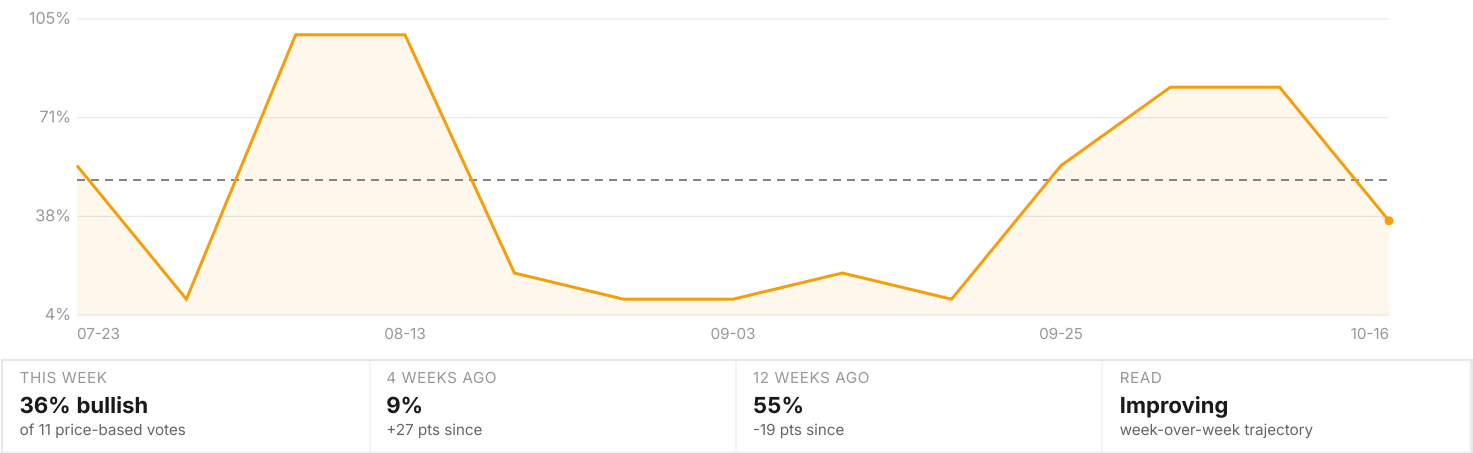
31

50

38

BEARISH — BUT WHICH WAY IS IT TRENDING?

vote share recomputed weekly, 13 weeks



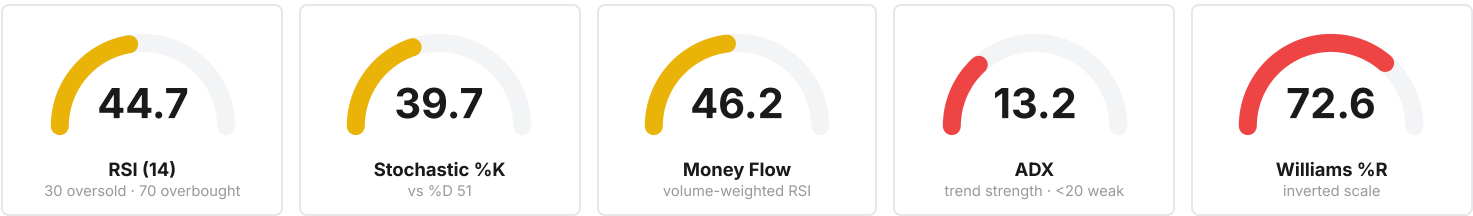
INDICATOR VOTE GRID

5 bull / 17 bear

● Price vs SMA 20	\$468.78	● Price vs SMA 50	\$469.58	● Price vs SMA 200	\$488.82
● EMA 9/21 Cross	469.8/468.4	● SMA 50/200	Death	● ADX Direction	ADX 13
● Supertrend	\$449	● Parabolic SAR	\$488	● SMA Slope	0.710
● RSI	44.7	● Stochastic K/D	40/51	● StochRSI K/D	21/41
● Williams %R	-73	● CCI	-50	● TSI vs Signal	4.3
● CMO	-10.5	● ROC	-3.05%	● OBV Signal	Distrib
● Chaikin MF	0.150	● MFI	46	● Force Index	-1M
● Elder Ray Bull	-0.02				

INDICATOR GAUGES

site technicals-tab style



33 KEY LEVELS & VOLATILITY

live indicator table

LEVEL	VALUE	LEVEL	VALUE
Pivot / R1 / R2	\$463.07 / \$468.55 / \$472.39	S1 / S2	\$459.23 / \$453.75
Bollinger (20,2)	\$452.10 - \$485.45	Squeeze	ON
52-wk range	\$402.48 - \$565.50	Off 52-wk high	-18.5%
ATR (14)	\$12.65 (2.7%)	Historical vol	21.3%

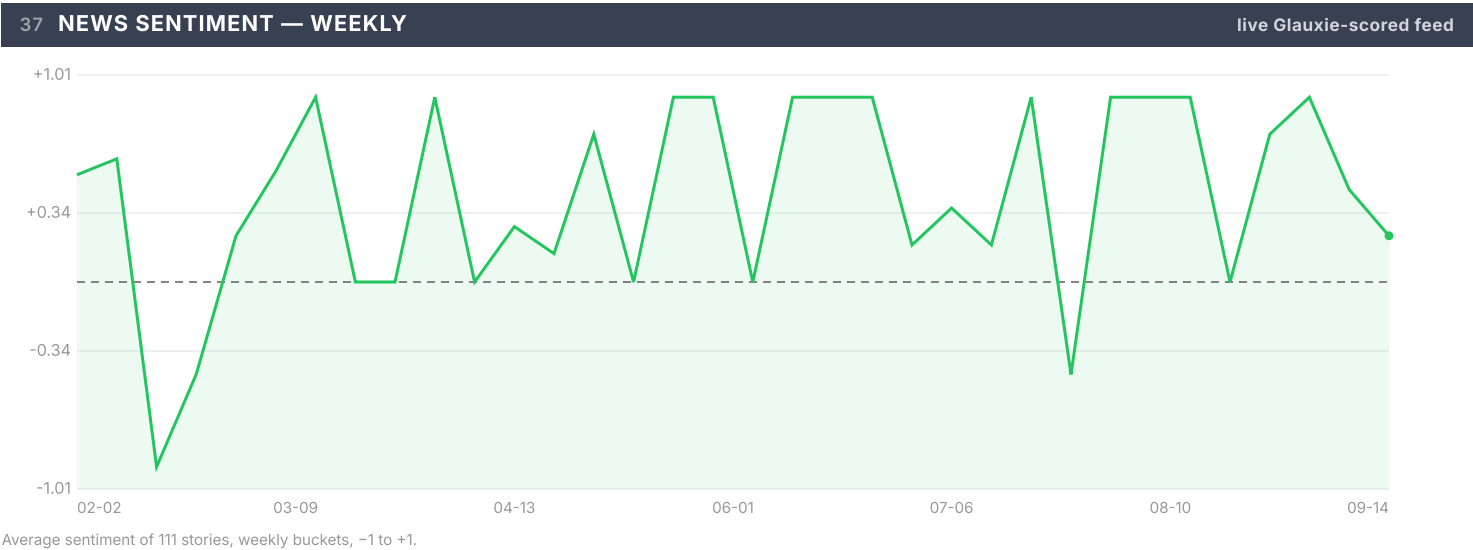
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34 SEASONALITY — 20-YEAR AVERAGES										live model · win rates shown	
-0.1%	+1.6%	+0.3%	+1.4%	+0.9%	-0.5%	+5.3%	+0.6%	+0.0%	+3.1%	+2.5%	+1.0%
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
55%	60%	57%	65%	55%	40%	70%	55%	55%	70%	75%	65%

Sample: 20 years — treat short histories as suggestive, not statistical.

35 RISK INDICATORS			computed from live price history	
COMPUTED FROM LIVE WEEKLY PRICES		HUBB	S&P 500	
Weekly volatility (σ , 1y)		4.32%	1.83%	
Best / worst week (1y)		+11.4% / -8.8%	—	
Max drawdown (5y, monthly)		-34.5%	—	
1-week VaR (95%)		-8.1%	—	
Beta (5y)		0.89	1.00	

36 EQUITY WEATHER & MARKET REGIME		EDGE · live weather engine	
HUBB EQUITY WEATHER (LIVE)		MARKET REGIME (2026-10-16)	
RAINY · -18		NEUTRAL	
Trend		VIX	DOW THEORY
Momentum		19.99	Confirmed
Volume		Normal	Bearish
Volatility		SPY / QQQ TSI	7.2 / 4.7
Breadth		trend strength	46/100
			breadth average



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38 WEATHER - COMPANY VS INDUSTRY, SECTOR, UNIVERSE

EDGE · live weather engine · Rainy

OVERALL	TREND	MOMENTUM	VOLUME
-18.3	+7.2	-19.6	-39.4
+13.6 vs industry	+41.2 vs industry	+21.3 vs industry	-7.8 vs industry

READING	HUBB	ELECTRICAL EQUIPMENT & PARTS N=954	INDUSTRIALS N=9,922	ALL US SYMBOLS N=70,435
Overall	-18.3	-31.9	-24.1	-20.5
Trend	+7.2	-34.0	-26.2	-21.3
Momentum	-19.6	-40.9	-24.5	-15.8
Volume	-39.4	-31.6	-22.6	-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

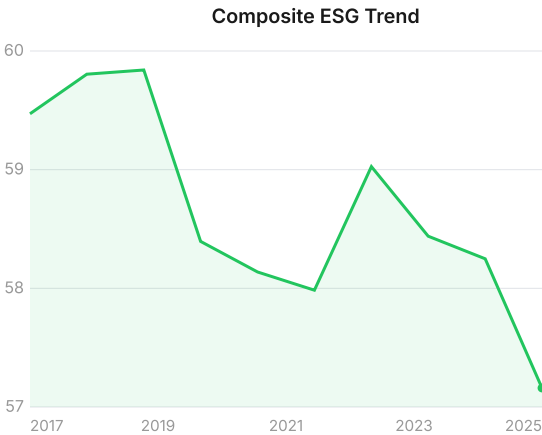
live proxy data · FY2025

EXECUTIVE	TOTAL COMP	STRUCTURE
GERBEN W. BAKKER Chairman, President and Chi	\$10.3M	66% equity+incentive
WILLIAM R. SPERRY Executive Vice President,	\$4.5M	59% equity+incentive
MARK E. MIKES President, Electrical Solution	\$2.4M	53% equity+incentive
GREGORY A. GUMBS President, Utility Solution	\$2.3M	55% equity+incentive
KATHERINE A. LANE Executive Vice President,	\$2.1M	56% equity+incentive

40 ESG ASSESSMENT

live disclosure-derived scores

PILLAR (LIVE DISCLOSURE SCORES)	SCORE
Environmental	51
Social	55
Governance	67
Composite ESG	58



41 8-K MATERIAL EVENTS

live EDGAR feed

FILED	8-K CONTENTS	ITEMS
2026-07-28	Earnings Release; Exhibits	2.02,9.01
2026-06-09	Regulation FD; Other Events; Exhibits	7.01,8.01,9.01
2026-06-08	Material Agreement; Financial Obligation; Other Events; Exhibits	1.01,2.03,8.01,9.01
2026-05-15	Material Agreement; Financial Obligation; Exhibits	1.01,2.03,9.01
2026-05-06	Shareholder Vote	5.07
2026-05-04	Material Agreement; Regulation FD; Other Events; Exhibits	1.01,7.01,8.01,9.01
2026-04-30	Earnings Release; Exhibits	2.02,9.01
2026-02-03	Results of Operations and Financial Condition; Financial Statements an	2.02,9.01

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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 · 2020-07-30 to 2026-04-30
Analyst estimates	dim/forward_estimates	3 rows · 2026-12-31 to 2028-12-31
Institutional ownership (13F)	holdings_db.institutional_ownership_summary	43 rows · 2015 to 2026
Insider transactions (Form 4)	edgar/form4	12 rows · 2026-05-05 to 2026-09-15
Proposed sales (Form 144)	edgar/form144	1 record
Beneficial ownership (13D/G)	edgar/13dg	4 rows · 2026-01-29 to 2026-04-30
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.