

Keysight Technologies, Inc. (KEYS)

Technology / Hardware, Equipment & Parts · New York Stock Exchange

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
\$331.21	\$56.4B	\$389.93	45.6	64.7%	20%	7/9	+103.9%
2026-10-16	VOLUME	52-WK LOW	P/S	NET MARGIN	ROIC	ALTMAN Z	5-YR RETURN
	1.3M	\$161.16	8.57	19.1%	12%	8.5	+279.4%

Keysight Technologies, Inc. specializes in providing advanced electronic design and testing solutions to a diverse array of global industries, spanning commercial communications, networking, aerospace, defense, government, automotive, energy, semiconductor manufacturing, general electronics, and education. The company's operations extend across the Americas, Europe, and the Asia Pacific region. Its Communications Solutions Group focuses on electronic design automation (EDA) software and sophisticated radio frequency (RF) and microwave testing systems, along with associated software. This segment also delivers cutting-edge hardware and virtual platforms for network testing, addressing areas such as data centers, routing and switching, software-defined networking (SDN), security, and encryption. Furthermore, it supplies a range of precision measurement instruments including oscilloscopes, logic and serial protocol analyzers, signal sources, arbitrary waveform generators, bit error rate testers, and optical analysis equipment like modulation analyzers, component analyzers, power meters, and laser sources. The group also facilitates the sale of certified refurbished Keysight equipment. Conversely, the Electronic Industrial Solutions Group offers a comprehensive suite of design and verification tools for industrial applications. Its product lineup encompasses essential laboratory and industrial instruments such as digital multimeters, function generators, frequency counters, data acquisition systems, audio analyzers, LCR meters, thermal imagers, source measure units, and ultra-high precision device current analyzers, alongside test executive software platforms. This segment also provides various power supply units, including AC/DC modular and electronically programmable loads, as well as printed-circuit-board-assembly testers, integrated circuit parametric testers, and sub-nanometer positioning sub-assemblies, complemented by general test and measurement products and software. Beyond its core products, Keysight provides extensive support services, including technical assistance, training, and consulting. The company employs a multifaceted distribution strategy, leveraging a direct sales force, distributors, resellers, and manufacturer's representatives. Keysight Technologies, Inc. was established in 1939 and is headquartered in Santa Rosa, California.

SECTOR Technology INDUSTRY Hardware, Equipment & Parts EXCHANGE NYSE MARKET CAP \$56.4B EMPLOYEES 16,800 (SEC-filed) CEO Satish C. Dhanasekaran
IPO 2014-10-20 COUNTRY US
1400 Fountaingrove Parkway, Santa Rosa, CA 95403-1738 · Tel 800 829 4444 · [keysight.com](https://www.keysight.com)

1 INSIDERSTREET SCORE

INSIDERSTREET SCORE

77 / 100

Street mean **\$421.29** (7 analysts, last qtr) — their number, not ours

INSIDER CONSENSUS SIGNAL

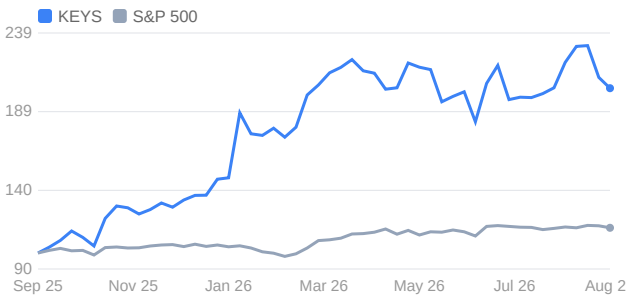
ROUTINE SELLING — LOW SIGNAL

\$17M sold / 6 mo, zero open-market buys

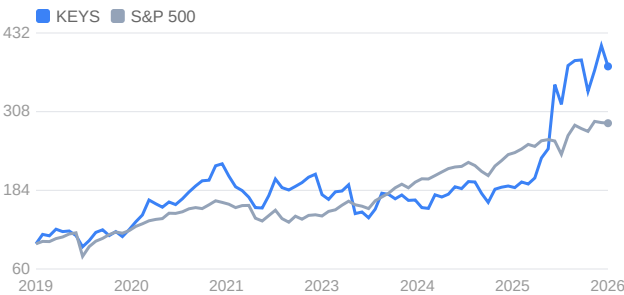
2 PRICE AND VOLUME

adjusted close, prod data layer

1 Year vs S&P 500 · **KEYS +103.9%** · **S&P 500 +15.9%** · spread **+88.1pp**



7 Years vs S&P 500 · **KEYS +279.4%** · **S&P 500 +189.9%** · spread **+89.5pp**



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

77

OF 100

Score Breakdown

Profitability	79/100
Growth	78/100
Momentum	100/100
Quality	88/100
Earnings Quality	78/100
Balance Sheet	86/100
Value	33/100
Risk (safety)	100/100
Overall	76.6/100

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
GRMN	78
COHR	43
CLS	66
FLEX	53
JBL	61
TDY	68
KEYS	77

IS Score Trend — quarterly



15 quarters, 23 Q1 to 26 Q3. Peak 77 in 26 Q3, latest 77 — +0.0 since. Fell in 1 of the last 4 quarters. Dashed line marks 40 on the 0-100 scale.

4 TWO READINGS business vs price

BUSINESS QUALITY

77 / 100

IS Score 76.6 / 100 · +0.0 from peak of 77

Quarter	Business Quality
23 Q1	77
23 Q2	77
23 Q3	77
23 Q4	77
24 Q1	77
24 Q2	77
24 Q3	77
24 Q4	77
25 Q1	77
25 Q2	77
25 Q3	77
25 Q4	77
26 Q1	77

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

PRICE STRUCTURE

BEARISH

Technical Score 31 / 100 · Power -38 · 4 of 22 indicator votes bullish

Date	Price Structure
07-23	31
08-13	31
09-03	31
09-25	31
10-16	31

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 77, price structure 31 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 76.6	would move us up one band
IS Score stops falling - one quarter higher than the prior	last four: 73 → 75 → 75 → 77	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 1,257 → now 1,257	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

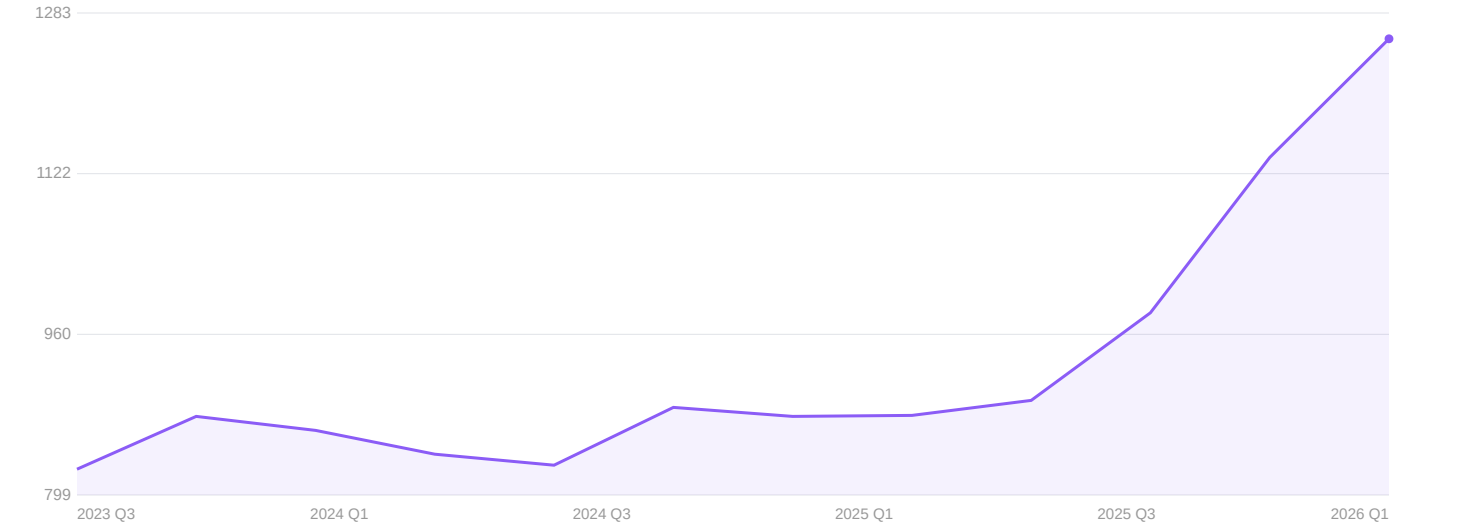
SITE CONVERGENCE SCORE 3 of 4 top 4% of 29,420 symbols	SOURCES ALIGNED — of 3 independent disclosures	CONGRESS (180D) 4 buys 2026-06-18	INSIDER BUYS (180D) 0 none disclosed
ETF FUNDS (30D) 1410 up / 1267 down net +143 funds	INSTITUTIONS ADDED (13F) 119 managers opening or increasing		

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 1,257 · latest 1,257 (+0 from peak).

QUARTER	HOLDERS	13F SHARES	VALUE	REPORTED OWN%
2026 Q2	1,257	155.5M	\$48.8B	89.9%
2026 Q1	1,138	151.8M	\$36.9B	87.7%
2025 Q4	982	156.6M	\$27.0B	90.5%
2025 Q3	894	152.5M	\$22.6B	88.1%
2025 Q2	879	153.9M	\$21.1B	89.0%
2025 Q1	878	155.2M	\$19.3B	89.7%
2024 Q4	887	154.0M	\$21.2B	89.0%
2024 Q3	829	151.5M	\$20.8B	87.6%
2024 Q2	840	152.4M	\$18.6B	88.1%
2024 Q1	864	153.0M	\$21.4B	88.5%
2023 Q4	878	150.7M	\$22.3B	87.1%
2023 Q3	825	149.8M	\$18.9B	86.6%

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
Dhanasekaran Satish	director, President and CEO	2026-09-30	SELL	3,000	\$1.09M	118,391
Poole Lisa M.	VP and Controller	2026-09-23	SELL	200	\$0.07M	6,134
Dougherty Neil	EVP and CFO	2026-09-21	SELL	2,000	\$0.68M	123,390
Estrada Ingrid A	SVP	2026-09-04	SELL	2,000	\$0.65M	101,861
Reese Scott	director	2026-08-26	A-Award	435	—	435
Nye Jean Mcclung	director	2026-08-21	SELL	3,000	\$0.96M	35,752
Estrada Ingrid A	SVP	2026-08-20	SELL	2,000	\$0.63M	103,861
Poole Lisa M.	VP and Controller	2026-08-01	TAX W/H	32	\$0.01M	6,334

9 SELL DECOMPOSITION — ROUTINE VS. DISCRETIONARY EDGE

6-MO DECOMPOSITION (FORM 4)	TXNS	SHARES	VALUE	SIGNAL WEIGHT
S — Open-market sales	16	56,911	\$17.3M	Counted
F — Tax withholding	3	668	\$0.2M	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 Routine Selling — Low Signal	OPEN-MARKET SELLS \$17.3M 16 txns / 6 mo	OPEN-MARKET BUYS \$0.0M 0 txns / 6 mo	CLUSTER None active 3+ insiders / 21 days
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10 FORM 144 PLANNED-SALE PIPELINE live EDGAR data

FILED	FILER	SHARES REGISTERED	EST. PROCEEDS
2026-09-30	Dhanasekaran Satish	3,000	\$1.1M
2026-09-23	Poole Lisa M.	200	\$0.1M
2026-09-21	Dougherty Neil	2,000	\$0.7M
2026-09-04	Estrada Ingrid A	2,000	\$0.7M
Trailing 12 mo	30 filings	143,038	\$34M

11 13D / 13G STAKES COND

FILED	FORM	REPORTING PERSON	% OF CLASS	SHARES
2026-05-15	SCHEDULE 13G/A	T. Rowe Price Associates, Inc.	8.70%	15.0M sh
2026-04-30	SCHEDULE 13G	Vanguard Capital Management	7.50%	12.9M sh
2026-04-29	SCHEDULE 13G	Vanguard Portfolio Management	5.03%	8.6M sh
2025-02-14	SCHEDULE 13G/A	T. Rowe Price Associates, Inc.	9.30%	16.1M sh

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12 CONGRESSIONAL TRADING					EDGE · STOCK Act
MEMBER	CHAMBER	TRADE	SIZE BAND	TRADED	DISCLOSED
Michael McCaul	House	BUY	\$1,001 - \$15,000	2026-06-18	2026-07-13
Michael T. McCaul	House	BUY	\$1,001 - \$15,000	2026-06-18	2026-07-13
Michael McCaul	House	BUY	\$15,001 - \$50,000	2026-04-17	2026-05-11
Bill Hagerty	Senate	SELL	\$50,001 - \$100,000	2024-10-30	2024-11-25
Tommy Tuberville	Senate	SELL	\$1,001 - \$15,000	2024-04-04	2024-05-15
Tommy Tuberville	Senate	SELL	\$1,001 - \$15,000	2024-04-04	2024-05-14
HOUSE 12-MO 6 trades 4 purchases		SENATE 12-MO 0 trades None purchases		COVERAGE STOCK Act filings 30-45 day disclosure lag	

13 INSTITUTIONAL OWNERSHIP & 13F FLOW

live 13F data

13F FILERS (LAST COMPLETE Q) 1,138	13F SHARES 152M 87.7% of shares out	NEW / CLOSED 232 / 64 positions, QoQ	INCREASED / REDUCED 375 / 364 positions, QoQ
PUT/CALL (13F) 1.06 option positions	FREE FLOAT 99.3% 169M sh		

2.8 · Largest Reporting 13F Managers

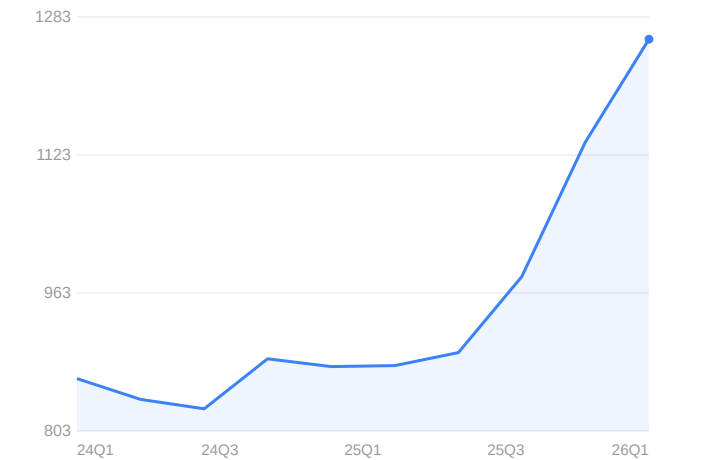
MANAGER	SHARES	VALUE
Assenagon Asset Management S.A.	877,071	\$319M
Fenimore Asset Management Inc	469,043	\$171M
Wedge Capital Management L L P/Nc	216,726	\$79M
Vontobel Holding Ltd.	97,969	\$36M
Mcrae Capital Management Inc	67,342	\$25M
Mn Services Vermogensbeheer B.V.	49,644	\$18M

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

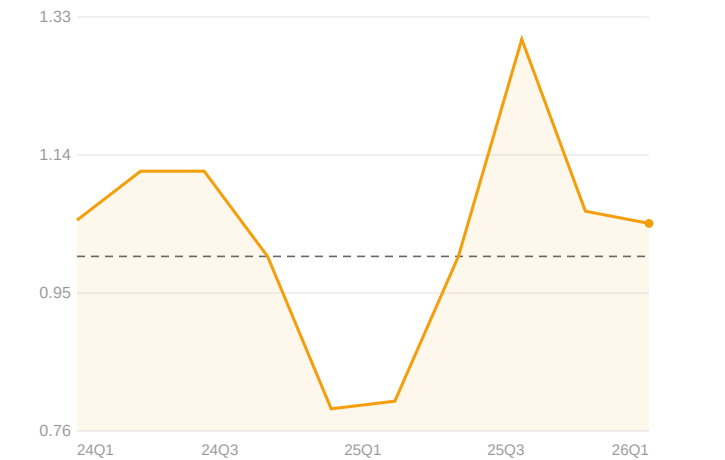
2.9 · Top ETF & Fund Ownership

FUND	WEIGHT	POSITION
VITSX	0.1%	\$2.0B
VTI	0.1%	\$2.0B
VSMPX	0.1%	\$2.0B
VTSAX	0.1%	\$2.0B
VFINX	0.1%	\$1.6B
VOO	0.1%	\$1.6B

13F Filers Holding KEYS — quarterly



Institutional Put/Call — quarterly

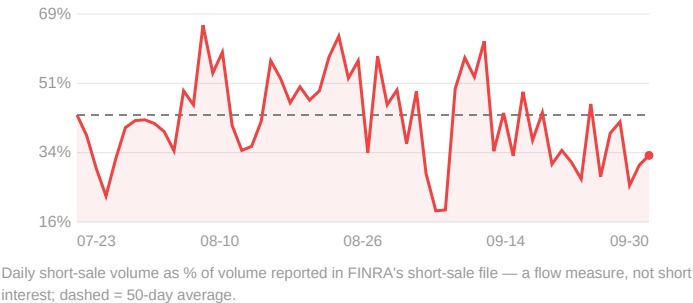


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14 SHORT VOLUME — DAILY, 60 SESSIONS

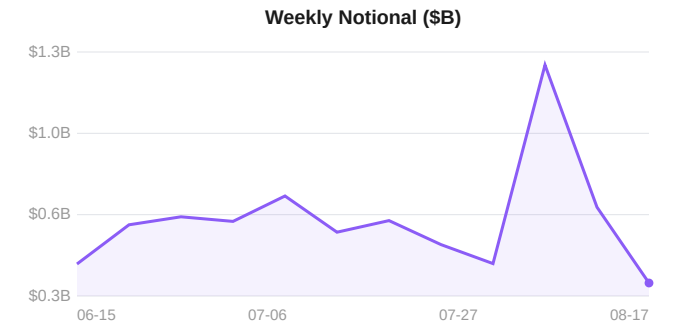
EDGE · live FINRA feed



LATEST SESSION	20-DAY AVG	TREND	BY MARKET CENTER
33.1% 2026-10-15	39.1% 50-day 43.4%	Falling 20d vs 50d	Q: 32% · N: 43% · B: 63% latest session

15 DARK POOL ACTIVITY

EDGE · live ATS data

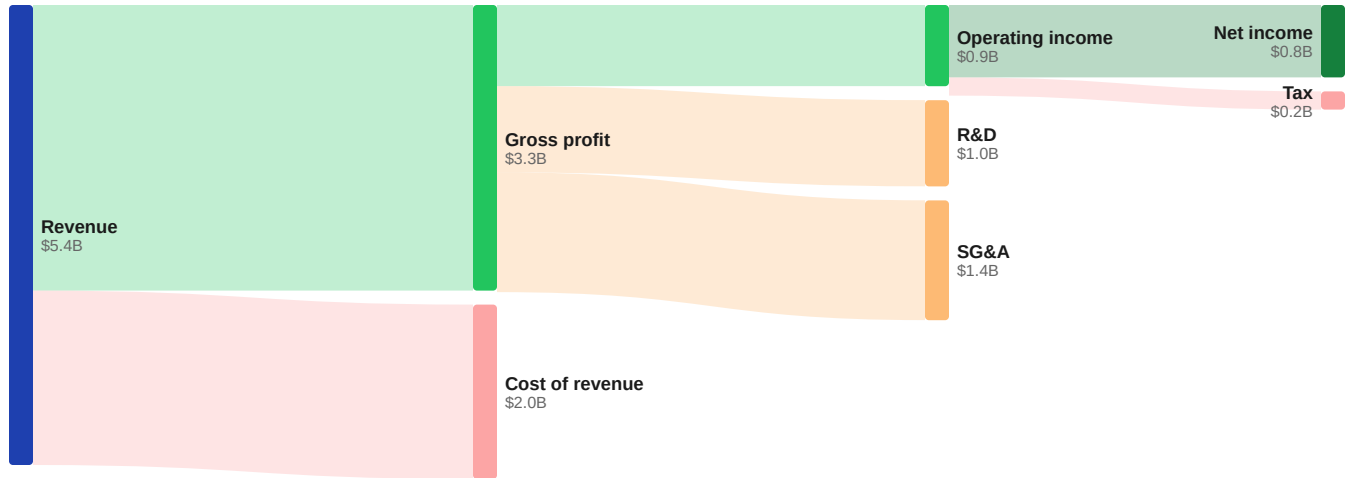


Where KEYS Trades in the Dark

ATS VENUE (4-WK)	SHARES	AVG TRADE
Incr Intelligent Cross Llc	1.5M	33 sh
Ubsa Ubs Ats	1.2M	44 sh
Sgmt Sigma X2	0.8M	31 sh
Ebxl Level Ats	0.6M	19 sh
Mlix Instinct X	0.6M	46 sh
Mstx Ms Trajectory Cross (Ats-1)	0.5M	18 sh

16 REVENUE FLOW — FY2025

live segmentation + income data



Where a dollar of Keysight Technologies, Inc. revenue goes. All values FY2025 filings, live.

17 GEOGRAPHIC REVENUE

live segmentation

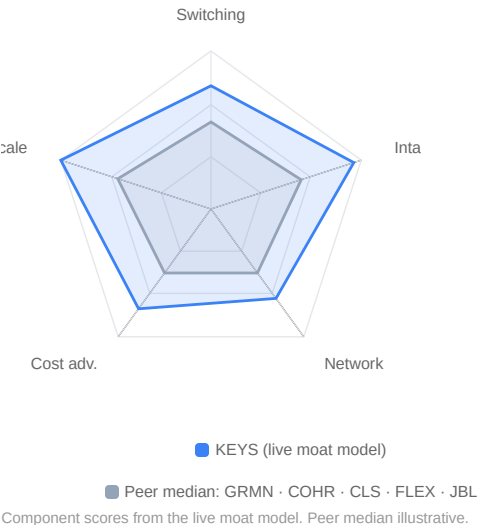
REGION	REVENUE	SHARE
Americas	\$2.1B	41%
Asia Pacific	\$2.0B	40%
Europe	\$934M	19%

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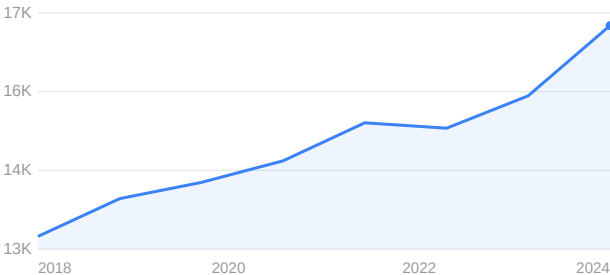
18 MOAT & COMPETITIVE POSITION

LIVE MODEL · 84/100 WIDE

Moat score 84/100 — Wide; primary source Efficient Scale.



3.8 · Employees (SEC filings)



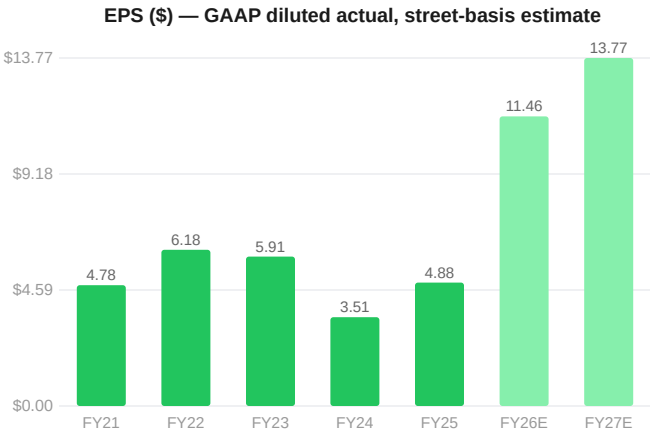
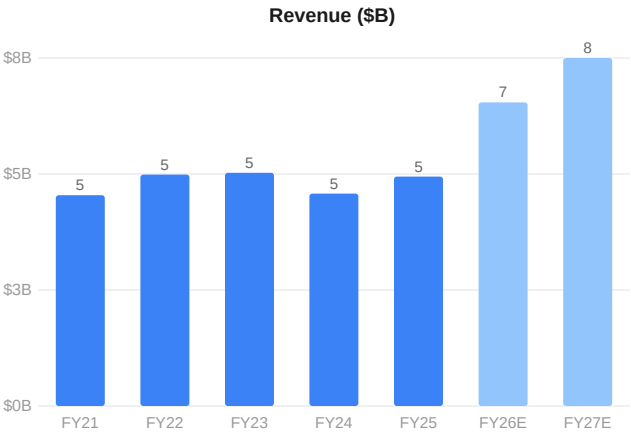
19 CORPORATE INFORMATION — KEY OFFICERS

16,800 employees

OFFICER	TITLE
Satish Dhanasekaran	President, Chief Executive Officer & Director
Neil Dougherty	Executive Vice President & Chief Financial Officer
Ingrid A. Estrada	SVP and Chief of Supply Chain & Operations Officer
Kailash Narayanan	Senior Vice President & President of Communications Solutions Group

20 REVENUE & EPS — HISTORY AND ESTIMATES

live consensus



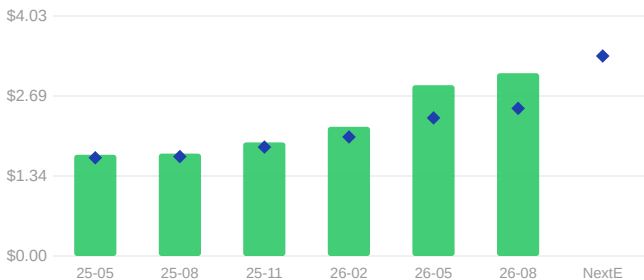
Actual bars are GAAP diluted EPS from the filed income statement; the lighter forward bars are street-basis consensus. The two are different measures and are not comparable quarter to quarter.

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21 ESTIMATE VS. ACTUAL & SURPRISES

live data

Quarterly EPS — Actual vs. Consensus



BEATS (>2%)
6 of 6
recent quarters

AVG SURPRISE
+11.1%

NEXT REPORT
2026-11-23

INCOME QUALITY
1.28
OCF ÷ net income

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 —%

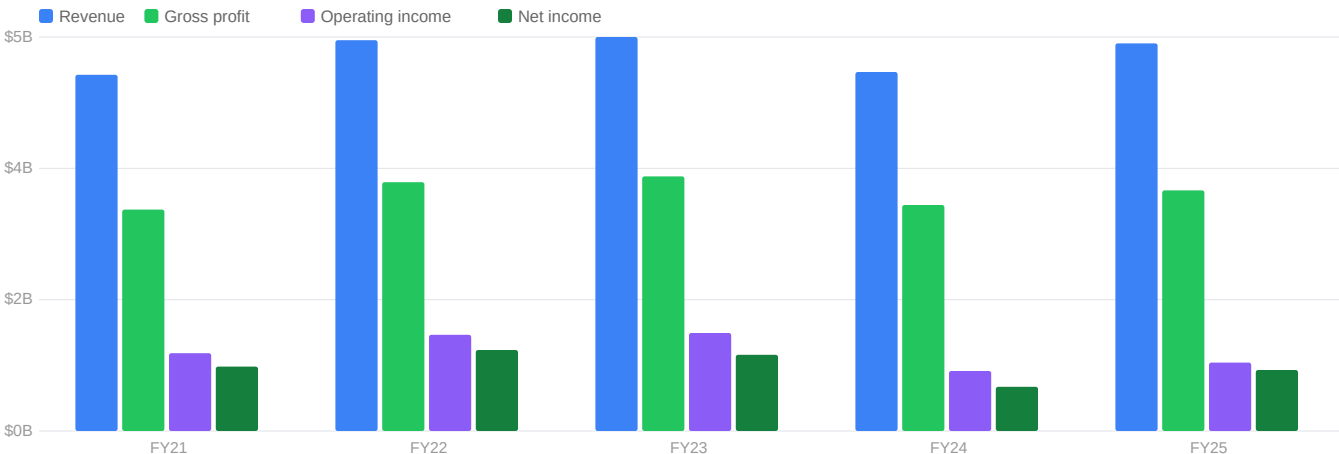
SURPRISE TREND
—
last 4 vs prior 4

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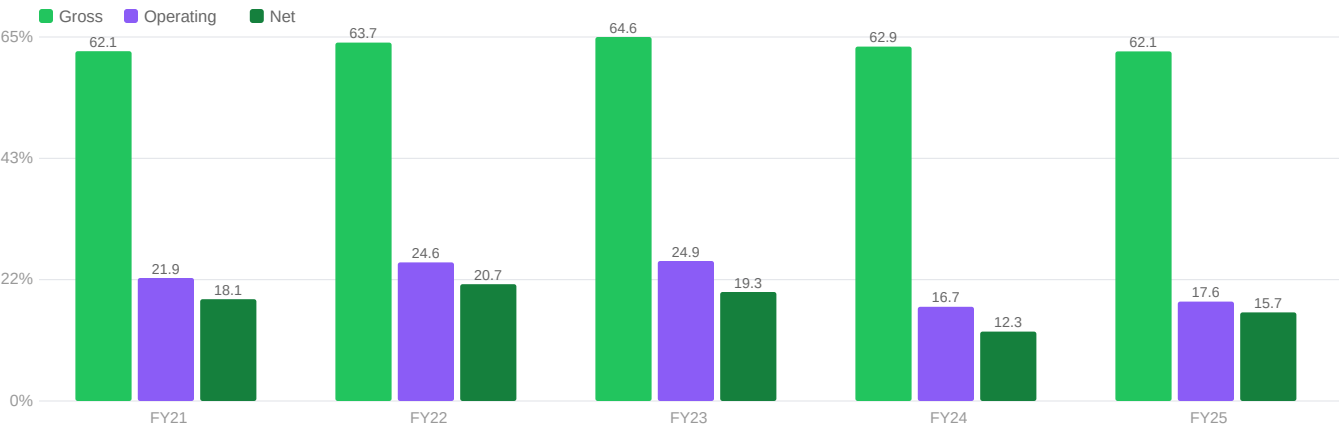
Announcement dates to . Consensus as it stood at each report. Revenue surprise shown where both estimate and actual are filed. A beat record is history, not a forecast.

INCOME TRENDS — 5 YEAR

live financials



Profit Margins (%)



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Revenue by Segment — Stacked



Live segmentation data.

YoY Growth Heatmap — Income Lines

YOY GROWTH	FY21	FY22	FY23	FY24	FY25
Revenue	+17.1%	+9.7%	+0.8%	-8.9%	+8.0%
Gross profit	+21.2%	+12.4%	+2.4%	-11.3%	+6.5%
Operating income	+41.2%	+23.5%	+1.8%	-38.7%	+13.8%
Net income	+42.6%	+25.7%	-6.0%	-41.9%	+37.8%

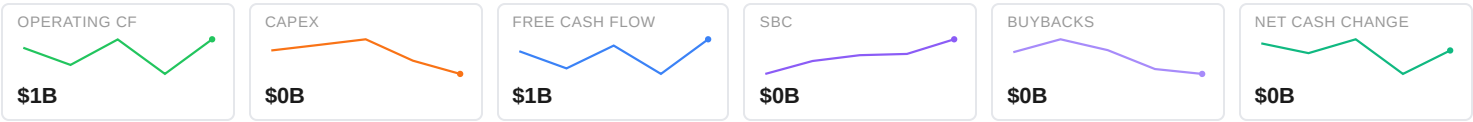
23 INCOME STATEMENT — FULL

live financials

\$B · FY ENDS	FY21	FY22	FY23	FY24	FY25	TREND
Revenue	4.9	5.4	5.5	5.0	5.4	
Cost of revenue	1.9	2.0	1.9	1.8	2.0	
Gross profit	3.1	3.5	3.5	3.1	3.3	
R&D expense	0.8	0.8	0.9	0.9	1.0	
SG&A expense	1.2	1.3	1.3	1.4	1.4	
Operating income	1.1	1.3	1.4	0.8	0.9	
EBITDA	1.4	1.6	1.6	1.2	1.4	
D&A	0.3	0.2	0.2	0.3	0.3	
Pretax income	1.0	1.3	1.4	0.9	1.1	
Income tax	0.1	0.2	0.3	0.3	0.2	
Net income	0.9	1.1	1.1	0.6	0.8	
Diluted EPS (\$)	4.78	6.18	5.91	3.51	4.88	
Diluted shares (M)	187	182	179	175	173	

CASH FLOW TRENDS

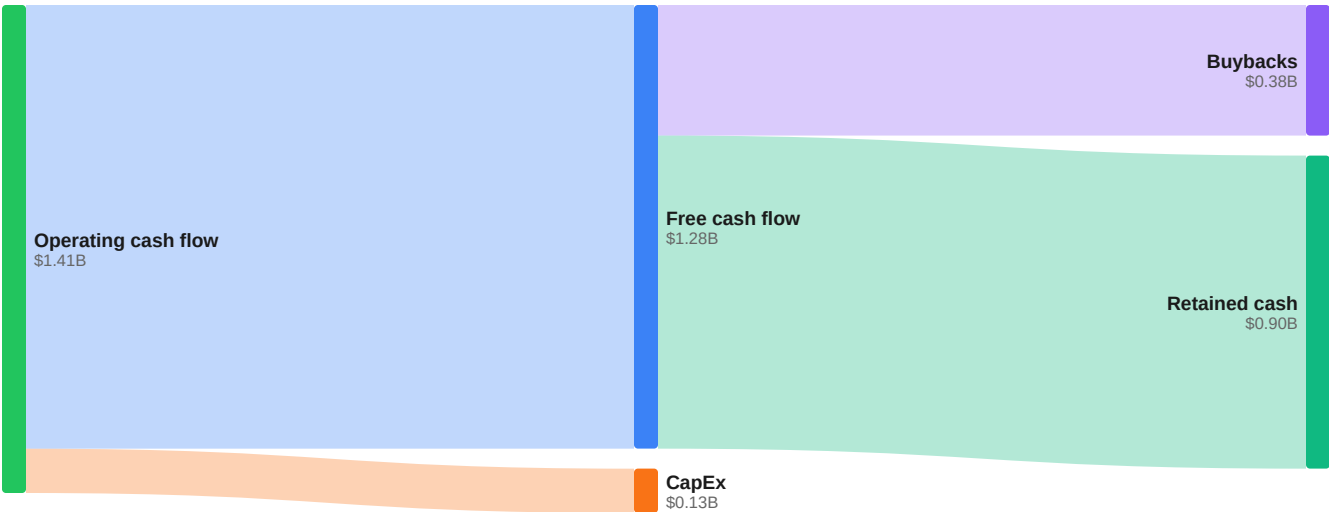
live data



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WHERE THE CASH WENT — FY2025

cash Sankey, live data



Balance Sheet — Full

\$B	FY22	FY23	FY24	FY25	
Cash & equivalents	2.0	2.5	1.8	1.9	
ST investments	0.0	0.0	0.0	0.0	
Receivables (net)	0.9	0.9	1.0	0.9	
Total current assets	4.2	4.8	4.3	4.3	
PP&E (net)	0.9	1.0	1.0	1.0	
Goodwill + intangibles	1.8	1.8	3.0	4.7	
Total assets	8.1	8.7	9.3	11.3	
Accounts payable	0.3	0.3	0.3	0.4	
Short-term debt	0.0	0.6	0.0	0.0	
Deferred revenue	0.5	0.5	0.6	0.7	
Total current liabilities	1.4	2.0	1.4	1.9	
Long-term debt	1.8	1.2	1.8	2.7	
Total liabilities	3.9	4.0	4.2	5.4	
Shareholders' equity	4.2	4.7	5.1	5.9	

Cash Flow Statement — Full

\$B	FY22	FY23	FY24	FY25	
Net income	1.1	1.1	0.6	0.8	
D&A	0.2	0.2	0.1	0.1	
Stock-based compensation	0.1	0.1	0.1	0.2	
Working capital change	(0.4)	(0.1)	(0.3)	0.1	
Operating cash flow	1.1	1.4	1.1	1.4	
Capital expenditures	(0.2)	(0.2)	(0.2)	(0.1)	
Investing cash flow	(0.3)	(0.3)	(0.8)	(1.7)	
Buybacks	(0.8)	(0.7)	(0.4)	(0.4)	
Dividends paid	0.0	0.0	0.0	0.0	
Debt issuance / (repay)	0.0	0.0	(0.0)	0.7	
Financing cash flow	(0.9)	(0.7)	(0.9)	0.4	
Free cash flow	1.0	1.2	0.9	1.3	

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24 EXPANDED RATIO ANALYSIS (I)

live ratio engine · profitability · valuation

RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
PROFITABILITY							
ROE	25.3%	28.3%	24.0%	12.6%	15.4%	20%	
ROA	11.9%	14.2%	12.6%	6.8%	8.2%	10.5%	
ROIC	25.5%	28.2%	25.1%	11.1%	10.1%	12.0%	
Gross margin	62.1%	63.7%	64.6%	62.9%	62.1%	64.7%	
Operating margin	21.9%	24.6%	24.9%	16.7%	17.6%	20.3%	
Net margin	18.1%	20.7%	19.3%	12.3%	15.7%	19.1%	
EBITDA margin	28.0%	29.3%	30.1%	24.5%	26.5%	28.3%	
FCF margin	23.2%	17.7%	22.2%	18.0%	25.5%	—	
VALUATION							
P/E	37.45	27.89	20.44	41.98	37.41	45.6	
P/B	8.85	7.53	4.64	5.05	5.39	8.7	
P/S	6.78	5.78	3.95	5.18	5.89	8.57	
P/FCF	29.17	32.69	17.82	28.71	23.09	38.4	
EV/EBITDA	24.21	19.74	12.85	21.34	22.98	30.4	
EV/Revenue	6.77	5.78	3.87	5.22	6.09	8.6	
Earnings yield	2.7%	3.6%	4.9%	2.4%	2.7%	2.19%	
FCF yield	3.4%	3.1%	5.6%	3.5%	4.3%	2.61%	

EXPANDED RATIO ANALYSIS (II)

leverage · solvency

RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
LEVERAGE & SOLVENCY							
Current ratio	2.93	3.01	2.35	2.98	2.35	2.02	
Quick ratio	2.34	2.40	1.87	2.27	1.78	1.62	
Debt / equity	0.53	0.48	0.44	0.40	0.51	0.42	
Debt / assets	26.0%	24.9%	23.3%	21.9%	26.3%	23.0%	
Net debt / EBITDA	-0.02	-0.02	-0.27	0.19	0.77	0.08	
Interest coverage	13.78	17.27	18.40	11.30	11.98	—	

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EXPANDED RATIO ANALYSIS (III)							efficiency · growth · per-share · scores
RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
EFFICIENCY							
Asset turnover	0.66	0.68	0.65	0.55	0.52	0.55	
Receivables turnover	7.37	6.61	5.91	5.53	5.99	6.2	
DSO (days)	50	55	62	66	61	59	
DPO (days)	50	59	60	59	60	67	
Cash conversion cycle	149	148	176	205	187	157	
GROWTH (YoY)							
Revenue growth	17.1%	9.7%	0.8%	-8.9%	8.0%	—	
Net income growth	42.6%	25.7%	-6.0%	-41.9%	37.8%	—	
EPS growth	44.9%	29.9%	-4.4%	-40.6%	37.8%	—	
FCF growth	27.7%	-16.5%	26.4%	-25.9%	52.7%	—	
PER SHARE (\$)							
EPS (diluted, TTM)	4.81	6.24	5.97	3.55	4.89	7.26	
Book value / share	20.34	23.12	26.29	29.51	33.97	37.98	
Revenue / share	26.56	30.11	30.87	28.78	31.07	38.05	
FCF / share	6.17	5.33	6.85	5.19	7.92	8.49	
Cash / share	11.03	11.34	13.97	10.38	10.83	15.06	
SHAREHOLDER RETURN & SCORES							
Buyback yield	2.0%	2.7%	3.3%	1.7%	1.2%	1.09%	
Altman Z-Score	7.13	7.21	5.68	5.90	5.46	8.5	
Piotroski F-Score	8	8	6	6	5	7/9	
Beneish M-Score	-2.57	-2.29	-2.65	-2.51	-2.61	-2.06	

25 EARNINGS QUALITY PANEL				live scores
MODEL	SCORE	ZONE	NOTE	
Piotroski F-Score	7 / 9	Strong		
Altman Z-Score	8.5	Safe (>2.99)	Safe	
Income quality	1.28	Cash-backed	OCF ÷ net income	
Beneish M-Score	-2.06	Elevated	vs -2.22 threshold	

26 DUPONT & GROWTH QUALITY				live analysis engine
DUPONT DECOMPOSITION (TTM)		VALUE	GROWTH QUALITY (LIVE)	VALUE
Tax burden		0.89	Revenue stability	0.48
Interest burden		0.96	Earnings stability	0.00
Operating margin		22.3%	Earnings persistence	0.50
Asset turnover		0.58×	Revenue CAGR 3y	5.6%
Financial leverage		1.84×	EPS CAGR 3y	4.8%
= ROE		21%	FCF CAGR 3y	6.6%

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SHAREHOLDER RETURN PROFILE live

BUYBACK YIELD 1.09%	DIVIDEND YIELD 0.00% none paid	TOTAL SHAREHOLDER RETURN 0.91% cash yield	SBC / REVENUE 3.3% 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
GRMN	\$54.9B	29.2	22%	26.8%	+13.5%	7/9	+15.9%
COHR	\$45.9B	53.5	8%	11.8%	+22.5%	7/9	+100.8%
CLS	\$38.3B	31.3	53%	7.8%	+47.5%	6/9	+8.6%
FLEX	\$33.4B	34.9	18%	3.6%	+12.2%	6/9	+42.8%
JBL	\$29.2B	28.2	67%	3.7%	+20.6%	6/9	—
TDY	\$28.7B	29.8	9%	15.1%	+7.9%	9/9	—
GLW	\$113.8B	59.8	16%	12.4%	+19.4%	8/9	—
FTV	\$17.5B	33.6	7%	14.3%	-29.8%	6/9	—

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

29 ANALYST CONSENSUS & ESTIMATES live consensus

Buy

16 Analysts

Str Sell (0)

Sell (0)

Hold (3)

Buy (13)

Str Buy (0)

MEAN TARGET (QTR)
\$421.29
7 targets

TARGET VS. PRICE
+27.2%
last-quarter mean

NEXT REPORT
2026-11-23
street \$3.36

CONSENSUS ESTIMATES	REVENUE MEAN	HIGH / LOW	EPS MEAN	HIGH / LOW	# EPS EST.
FY2026	\$7.11B	\$7.14B / \$7.09B	\$11.46	\$11.65 / \$11.20	6
FY2027	\$8.15B	\$8.65B / \$7.73B	\$13.77	\$15.42 / \$13.04	6
FY2028	\$8.83B	\$9.90B / \$8.28B	\$15.39	\$16.50 / \$14.28	2

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

Street Price Target — Trajectory

WINDOW	AVG TARGET	VS. PRICE	# TARGETS
Last Quarter	\$421.29	+27.2%	7
Last Year	\$317.63	-4.1%	38
All Time	\$266.39	-19.6%	62

Rolling mean of published targets vs. last close \$331.21. Aggregated from StreetInsider, Benzinga.

Third-Party Composite Rating

B-

DCF

2/5

ROE

4/5

ROA

4/5

DEBT/EQ

2/5

P/E

1/5

P/B

1/5

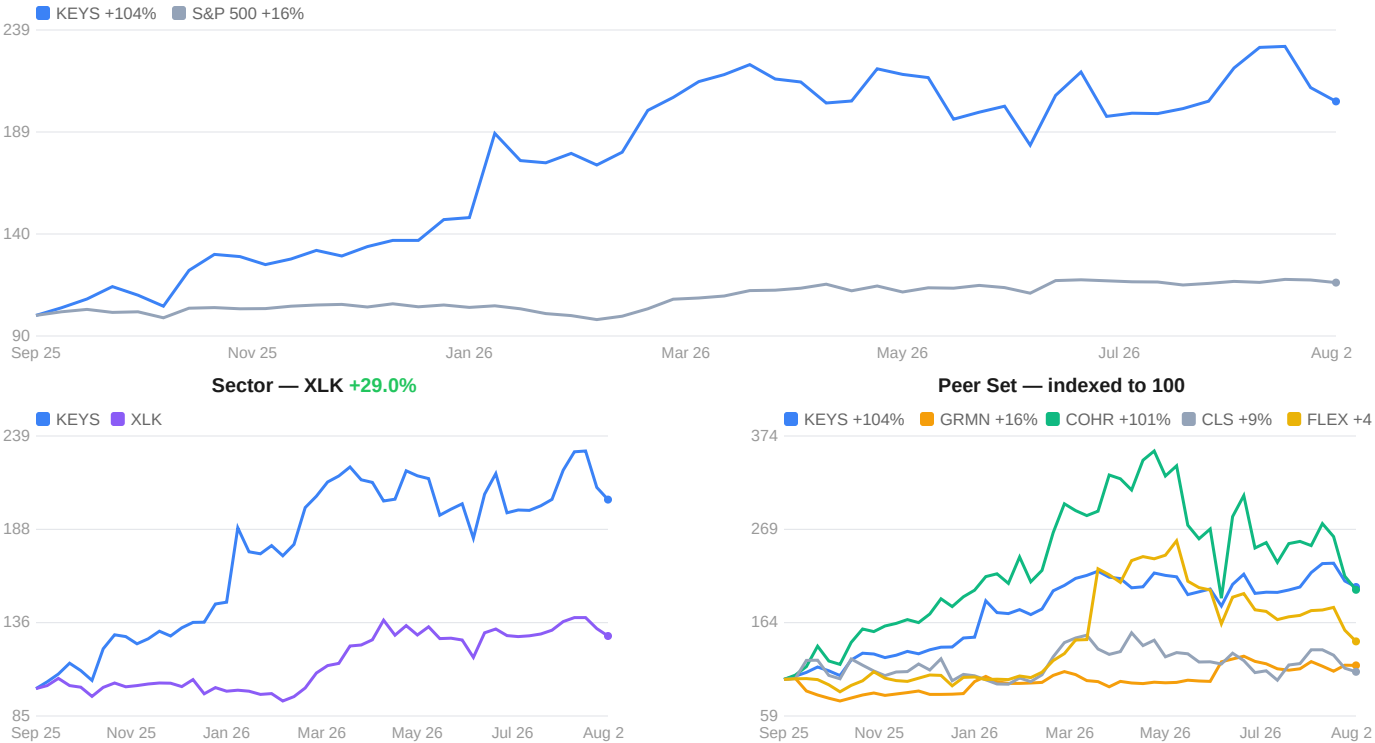
Independent quant composite as of 2026-10-16; components scored 1–5 (5 best). Shown for contrast with the InsiderStreet Score — methodologies differ.

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31 PRICE PERFORMANCE — INDEXED, 12 MO

live prices · benchmark + sector + peer set

KEYS +103.9% vs S&P 500 +15.9% — spread +88.1pp



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

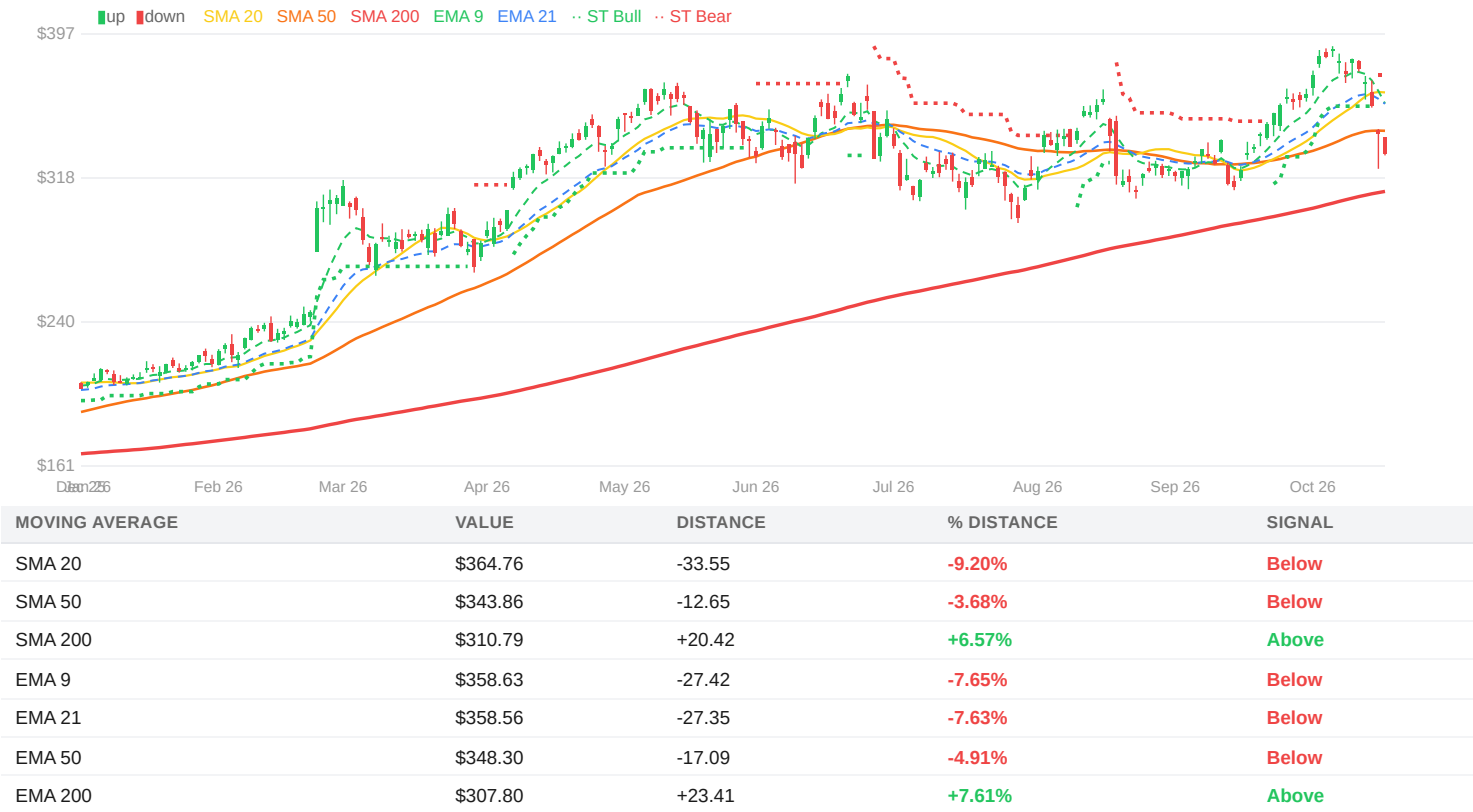


Candlesticks with SMA 20/50 overlay, Bollinger (20,2σ) band, volume, and Wilder RSI(14) — computed from live daily OHLCV.

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MOVING AVERAGE RIBBON & TREND

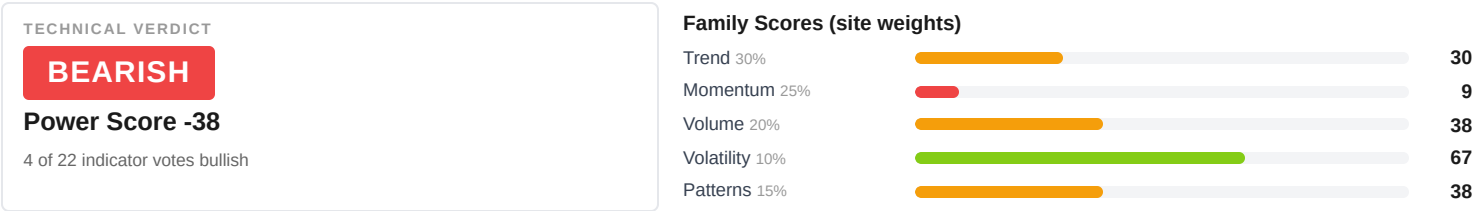
site technicals-tab chart, live indicator history



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

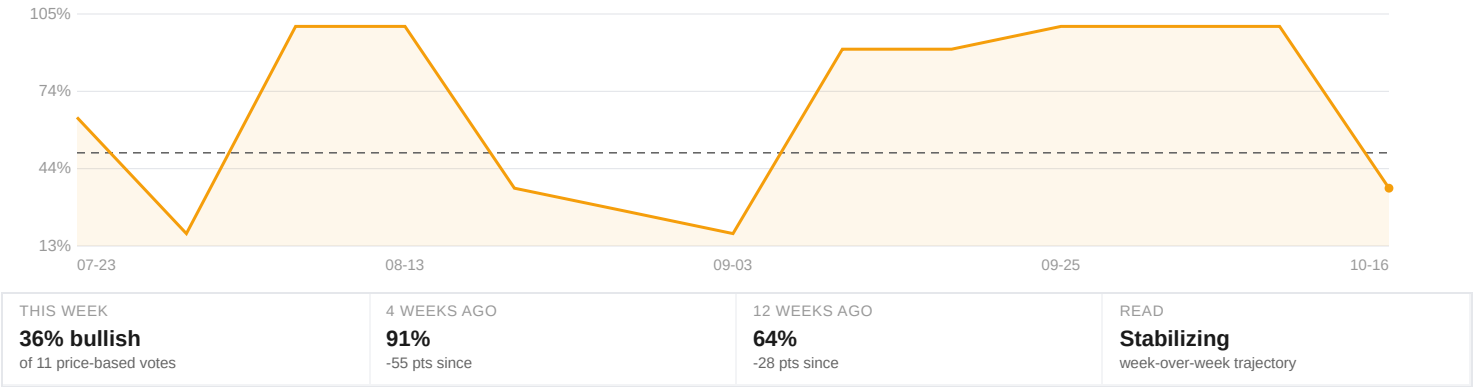
32 TECHNICAL POWER SCORE

EDGE · site engine · 31/100 composite



BEARISH — BUT WHICH WAY IS IT TRENDING?

vote share recomputed weekly, 13 weeks



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INDICATOR VOTE GRID				4 bull / 18 bear	
● Price vs SMA 20	\$364.76	● Price vs SMA 50	\$343.86	● Price vs SMA 200	\$310.79
● EMA 9/21 Cross	358.6/358.6	● SMA 50/200	Golden	● ADX Direction	ADX 26
● Supertrend	\$374	● Parabolic SAR	\$384	● SMA Slope	-0.190
● RSI	37.1	● Stochastic K/D	16/31	● StochRSI K/D	0/0
● Williams %R	-88	● CCI	-147	● TSI vs Signal	9.4
● CMO	-25.8	● ROC	-13.89%	● OBV Signal	Distrib
● Chaikin MF	0.170	● MFI	45	● Force Index	-8M
● Elder Ray Bull	-18.25				

INDICATOR GAUGES					site technicals-tab style
37.1 RSI (14) 30 oversold · 70 overbought	15.7 Stochastic %K vs %D 31	45.3 Money Flow volume-weighted RSI	25.9 ADX trend strength · <20 weak	87.8 Williams %R inverted scale	

33 KEY LEVELS & VOLATILITY				live indicator table	
LEVEL	VALUE		LEVEL	VALUE	
Pivot / R1 / R2	\$336.65 / \$350.24 / \$358.39		S1 / S2	\$328.50 / \$314.91	
Bollinger (20,2)	\$333.02 – \$396.50		Squeeze	Off	
52-wk range	\$161.17 – \$389.93		Off 52-wk high	-15.1%	
ATR (14)	\$12.64 (3.8%)		Historical vol	34.1%	

34 SEASONALITY — 12-YEAR AVERAGES												live model · win rates shown	
+1.4%	+4.0%	-1.0%	-2.0%	+4.9%	+1.2%	+2.4%	+3.1%	+0.8%	+3.4%	+7.3%	+0.8%		
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
58%	50%	42%	36%	73%	36%	55%	73%	55%	75%	83%	42%		

Sample: 12 years — treat short histories as suggestive, not statistical.

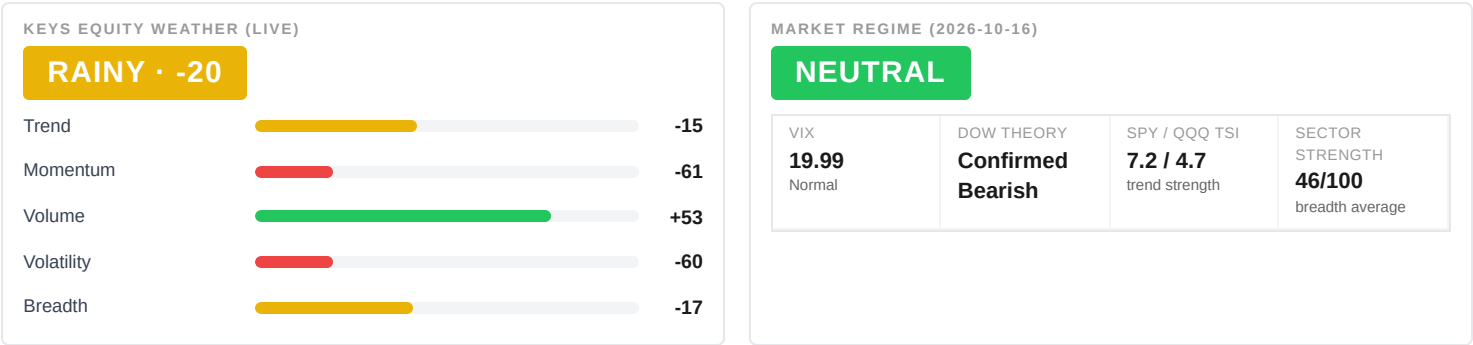
35 RISK INDICATORS			computed from live price history	
COMPUTED FROM LIVE WEEKLY PRICES		KEYS	S&P 500	
Weekly volatility (σ , 1y)		6.56%	1.83%	
Best / worst week (1y)		+27.8% / -9.9%	—	
Max drawdown (5y, monthly)		-37.7%	—	
1-week VaR (95%)		-9.4%	—	
Beta (5y)		1.21	1.00	

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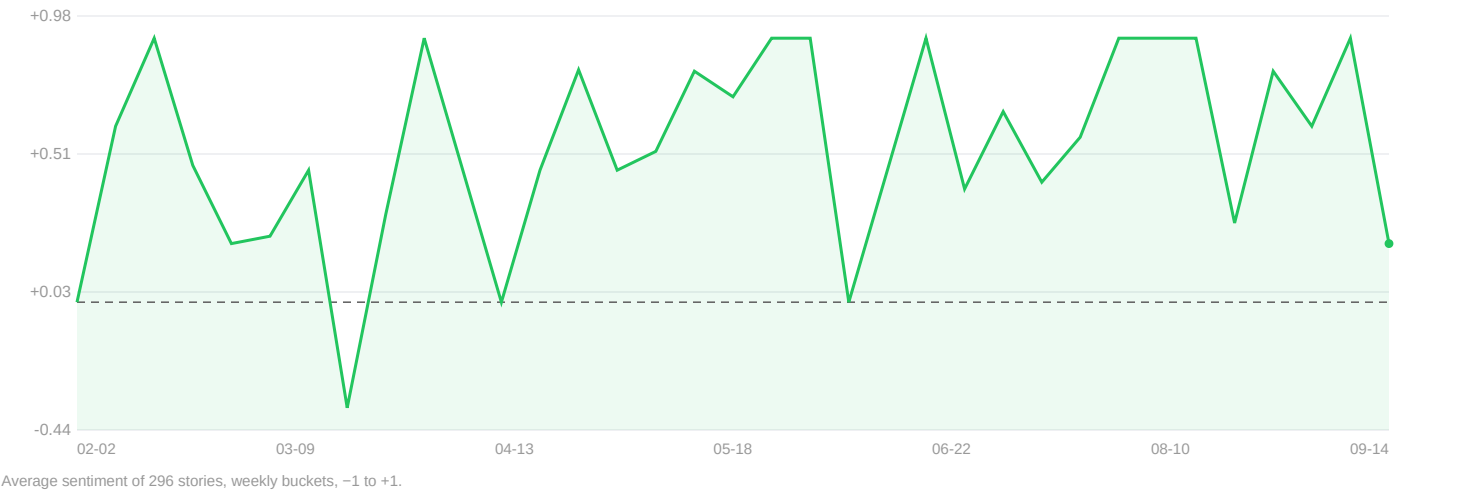
36 EQUITY WEATHER & MARKET REGIME

EDGE · live weather engine



37 NEWS SENTIMENT — WEEKLY

live Glauxie-scored feed



38 WEATHER - COMPANY VS INDUSTRY, SECTOR, UNIVERSE

EDGE · live weather engine · Rainy

OVERALL		TREND		MOMENTUM		VOLUME	
-19.9		-15.3		-60.9		+53.2	
+4.5 vs industry		+7.7 vs industry		-23.1 vs industry		+51.7 vs industry	

READING	KEYS	HARDWARE, EQUIPMENT & PARTS N=1,098	TECHNOLOGY N=6,969	ALL US SYMBOLS N=70,435
Overall	-19.9	-24.4	-20.7	-20.5
Trend	-15.3	-23.0	-20.8	-21.3
Momentum	-60.9	-37.8	-28.5	-15.8
Volume	+53.2	+1.5	+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

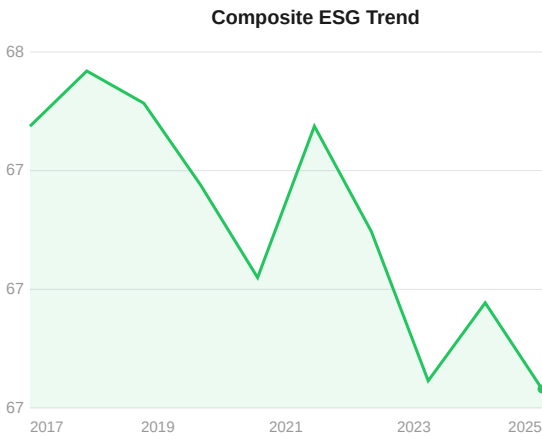
EXECUTIVE	TOTAL COMP	STRUCTURE
Satish C. Dhanasekaran President and Chief E	\$18.0M	94% equity+incentive
Soon Chai Gooi Former Senior Vice President,	\$11.7M	53% equity+incentive
Neil P. Dougherty Executive Vice President a	\$8.9M	91% equity+incentive
Kailash Narayanan Senior Vice President, Pre	\$6.4M	89% equity+incentive
Ingrid A. Estrada Senior Vice President, Chi	\$5.2M	86% equity+incentive

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40 ESG ASSESSMENT

live disclosure-derived scores

PILLAR (LIVE DISCLOSURE SCORES)	SCORE
Environmental	63
Social	69
Governance	67
Composite ESG	66



41 8-K MATERIAL EVENTS

live EDGAR feed

FILED	8-K CONTENTS	ITEMS
2026-08-26	Officer/Director Change; Exhibits	5.02,9.01
2026-08-18	Earnings Release; Exhibits	2.02,9.01
2026-05-19	Earnings Release; Exhibits	2.02,9.01
2026-04-23	Financial Obligation; Exhibits	2.03,9.01
2026-03-24	Shareholder Vote	5.07
2026-03-13	Departure/Election of Directors; Appointment of Officers	5.02
2026-02-23	Results of Operations and Financial Condition; Financial Statements an	2.02,9.01
2025-11-24	Results of Operations and Financial Condition; Financial Statements an	2.02,9.01

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 · 2020-11-18 to 2026-08-18	
Analyst estimates	dim/forward_estimates	3 rows · 2026-10-31 to 2028-10-31	
Institutional ownership (13F)	holdings_db.institutional_ownership_summary	51 rows · 2010 to 2026	
Insider transactions (Form 4)	edgar/form4	12 rows · 2026-06-02 to 2026-09-30	
Proposed sales (Form 144)	edgar/form144	1 record	
Beneficial ownership (13D/G)	edgar/13dg	4 rows · 2025-02-14 to 2026-05-15	
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.