

Marsh & McLennan Companies, Inc. (MRSH)

Financial Services / Insurance - Brokers · New York Stock Exchange

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

LAST CLOSE	MARKET CAP	52-WK HIGH	TRAILING PE	GROSS MARGIN	ROE	PIOTROSKI
\$188.35	\$89.9B	\$198.49	22.4	42.8%	27%	7/9
2026-OCT-18	VOLUME	52-WK LOW	P/S	NET MARGIN	ROIC	ALTMAN Z
	2.8M	\$156.60	3.16	14.2%	12%	2.7

Marsh & McLennan Companies, Inc. (MRSH) functions as a leading professional services organization, delivering expert guidance and innovative solutions to clients across the vital domains of risk management, strategic planning, and human capital. Based in New York City, the firm maintains a substantial global workforce, employing approximately 65,000 full-time professionals. This entity serves as the parent company for several prominent advisory and consulting brands. These include Marsh, renowned for its insurance brokerage services; Guy Carpenter, a specialist in risk and reinsurance; Mercer, which provides comprehensive human resources and investment-related financial advice; and Oliver Wyman Group, an influential management and economic consultancy. Marsh & McLennan structures its operations into two core business segments. The "Risk and Insurance Services" division encompasses activities such as risk management, along with comprehensive insurance and reinsurance brokerage and services. The "Consulting" division offers a broad spectrum of services, including health, retirement, talent, and investment consulting, as well as specialized advice in management, economics, and brand strategy. The Risk and Insurance Services segment's operations are primarily conducted through Marsh and Guy Carpenter, while Mercer and Oliver Wyman Group are the key contributors to the Consulting segment's offerings.

SECTOR Financial Services INDUSTRY Insurance - Brokers EXCHANGE NYSE MARKET CAP \$89.9B EMPLOYEES 95,000 (SEC-filed) CEO John Q. Doyle IPO 1987-12-30

COUNTRY US

1166 Avenue of the Americas, New York City, NY 10036-2774 · Tel 212 345 5000 · corporate.marsh.com

1 INSIDERSTREET SCORE

INSIDERSTREET SCORE

50 / 100

Street mean **\$199.67** (9 analysts, last qtr) — their number, not ours

INSIDER CONSENSUS SIGNAL

ROUTINE SELLING — LOW SIGNAL

\$12M sold / 6 mo, zero open-market buys

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NOT INVESTMENT ADVICE — FOR INFORMATIONAL PURPOSES ONLY

2 INSIDERSTREET SCORE

live IS factor model

INSIDERSTREET
SCORE

50

OF 100

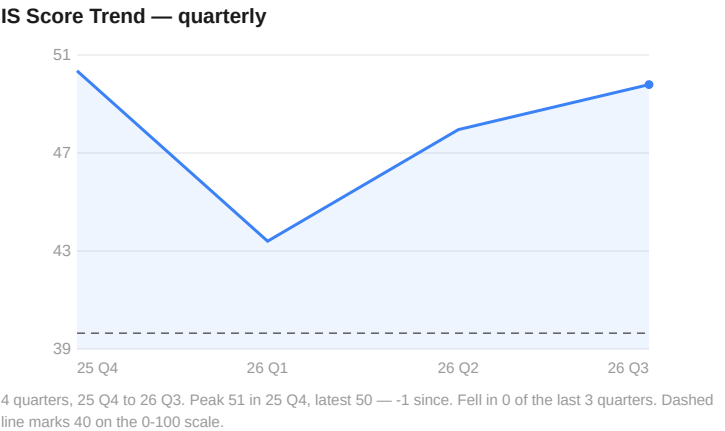
Score Breakdown

Profitability	59/100
Quality	62/100
Earnings Quality	70/100
Balance Sheet	35/100
Value	51/100
Risk (safety)	100/100
Overall	50.1/100

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
AJG	52
AON	50
WLTW	51
BRO	60
ICE	59
HOOD	31
MRSH	50



3 TWO READINGS

business vs price



PRICE STRUCTURE

BULLISH

Technical Score 86 / 100 · Power +72 · 21 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.

Both readings sit above the midpoint — business quality at 50 and price structure at 86 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.

4 WHAT WOULD CHANGE OUR MIND

falsifiable - check us next quarter

TRIGGER	WHERE IT STANDS NOW	WHAT IT WOULD MEAN
IS Score reaches 55 and holds two consecutive quarters	now 50.1	would move us up one band

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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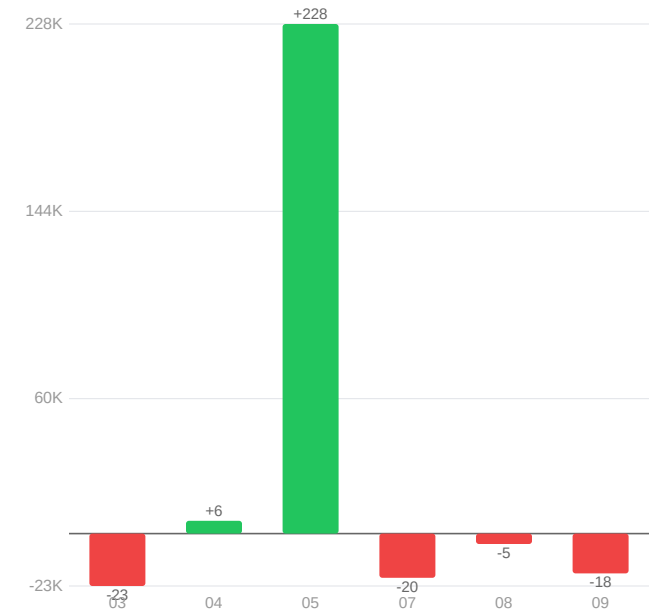
5 SMART MONEY CONFLUENCE				EDGE · disclosure sources
SITE CONVERGENCE SCORE 3 of 4 top 4% of 29,420 symbols	SOURCES ALIGNED — of 3 independent disclosures	CONGRESS (180D) 2 buys 2026-06-02	INSIDER BUYS (180D) 0 none disclosed	
ETF FUNDS (30D) 1164 up / 974 down net +190 funds	INSTITUTIONS ADDED (13F) 1,507 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.

6 INSIDER ACTIVITY							live Form 4 data
INSIDER	ROLE	DATE	TYPE	SHARES	VALUE	POST-TXN OWNED	
Brennan Katherine	SVP and General Counsel	2026-09-02	EXERCISE	1,197	\$0.10M	8,527	
Brennan Katherine	SVP and General Counsel	2026-09-02	SELL	1,197	\$0.22M	7,330	
Brennan Katherine	SVP and General Counsel	2026-09-02	EXERCISE	1,197	\$0.10M	0	
Doyle John Q	President and CEO	2026-09-02	EXERCISE	16,656	\$1.22M	133,467	
Doyle John Q	President and CEO	2026-09-02	SELL	16,656	\$3.14M	116,811	
Doyle John Q	President and CEO	2026-09-02	EXERCISE	16,656	\$1.22M	16,656	
Schapiro Morton O	director	2026-08-15	A-Award	219	—	91,138	
Yates Lloyd M	director	2026-08-15	A-Award	224	—	12,680	

7 SELL DECOMPOSITION — ROUTINE VS. DISCRETIONARY					EDGE
6-MO DECOMPOSITION (FORM 4)	TXNS	SHARES	VALUE	SIGNAL WEIGHT	
S — Open-market sales	9	67,020	\$12.4M	Counted	
M — Exercises (paired A/D)	15	175,788	\$2.5M	None — mechanics	
F — Tax withholding	11	69,365	\$12.9M	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 \$12.4M 9 txns / 6 mo	OPEN-MARKET BUYS \$0.0M 0 txns / 6 mo	CLUSTER None active 3+ insiders / 21 days
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8 FORM 144 PLANNED-SALE PIPELINE live EDGAR data

FILED	FILER	SHARES REGISTERED	EST. PROCEEDS
2026-09-02	Doyle John Q	16,656	\$3.1M
2026-09-02	Brennan Katherine	1,197	\$0.2M
2026-08-06	Jones John Jude	6,500	\$1.2M
2026-07-29	Beswick Paul	713	\$0.1M
Trailing 12 mo	11 filings	123,472	\$23M

9 13D / 13G STAKES COND

FILED	FORM	REPORTING PERSON	% OF CLASS	SHARES
2026-04-30	SCHEDULE 13G	Vanguard Capital Management	7.52%	36.4M sh
2026-03-27	SCHEDULE 13G/A	The Vanguard Group	—	exit/reporting change

10 CONGRESSIONAL TRADING EDGE · STOCK Act

MEMBER	CHAMBER	TRADE	SIZE BAND	TRADED	DISCLOSED
Kevin Hern	House	SELL	\$50,001 - \$100,000	2026-09-23	2026-10-14
Kevin Hern	House	SELL	\$50,001 - \$100,000	2026-09-23	2026-10-13
Kevin Hern	House	SELL	\$50,001 - \$100,000	2026-09-17	2026-10-14
Tina Smith	Senate	SELL	\$50,001 - \$100,000	2026-01-27	2026-01-30

HOUSE 12-MO 20 trades 3 purchases	SENATE 12-MO 1 trades 0 purchases	COVERAGE STOCK Act filings 30-45 day disclosure lag	
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11 INSTITUTIONAL OWNERSHIP & 13F FLOW live 13F data

13F FILERS (LAST COMPLETE Q) 0	13F SHARES 0M 0.0% of shares out	NEW / CLOSED 0 / 0 positions, QoQ	INCREASED / REDUCED 0 / 0 positions, QoQ
PUT/CALL (13F) — option positions	FREE FLOAT 99.9% 477M sh		

2.8 · Largest Reporting 13F Managers

MANAGER	SHARES	VALUE
Ninety One Uk Ltd	5.6M	\$962M
Davenport & Co Llc	608,732	\$104M
Ninety One North America, Inc.	401,969	\$69M
Birch Hill Investment Advisors Llc	394,139	\$67M
Fjarde Ap-Fonden /Fourth Swedish N	307,521	\$53M
Vontobel Holding Ltd.	296,160	\$51M

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%	\$2.6B
VTI	0.1%	\$2.6B
VSPMX	0.1%	\$2.6B
VTSAX	0.1%	\$2.6B
VOO	0.1%	\$2.1B
VFINX	0.1%	\$2.1B

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12 SHORT VOLUME — DAILY, 60 SESSIONS

EDGE · live FINRA feed

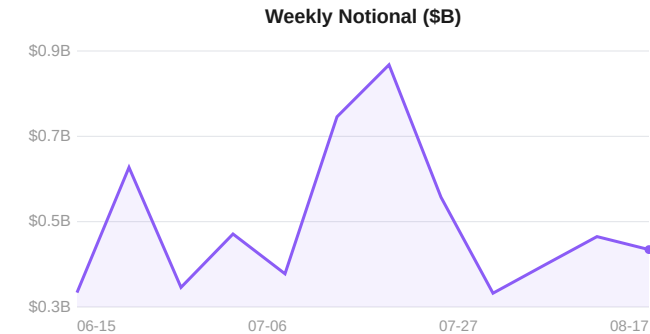


Daily short-sale volume as % of volume reported in FINRA's short-sale file — a flow measure, not short interest; dashed = 50-day average.

LATEST SESSION 41.0% 2026-10-15	20-DAY AVG 44.2% 50-day 36.8%	TREND Rising 20d vs 50d	BY MARKET CENTER Q: 42% · N: 32% · B: 44% latest session
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13 DARK POOL ACTIVITY

EDGE · live ATS data



Where MRSH Trades in the Dark

ATS VENUE (4-WK)	SHARES	AVG TRADE
Incr Intelligent Cross Llc	3.4M	49 sh
Ubsa Ubs Ats	2.6M	55 sh
Bids Bids Ats	2.0M	496 sh
Sgmt Sigma X2	1.8M	46 sh
Ebxl Level Ats	1.8M	29 sh
Mlix Instinct X	1.7M	82 sh

14 GEOGRAPHIC REVENUE

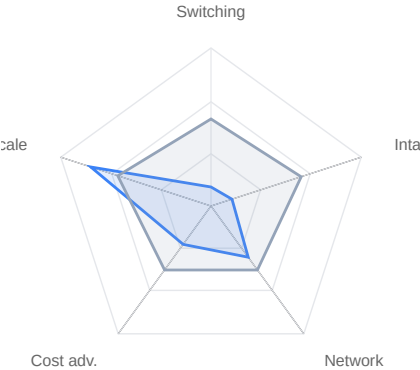
live segmentation

REGION	REVENUE	SHARE
UNITED STATES	\$13.3B	49%
Other Geographic Areas	\$9.9B	37%
UNITED KINGDOM	\$3.8B	14%

15 MOAT & COMPETITIVE POSITION

LIVE MODEL · 30/100 NONE

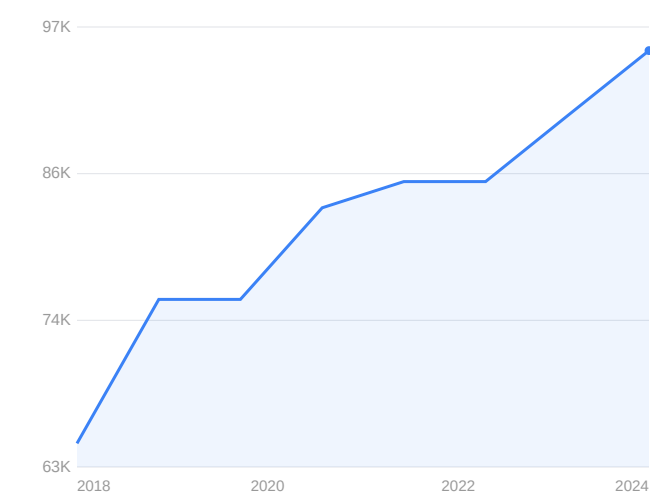
Moat score 30/100 — None; primary source Efficient Scale.



MRSH (live moat model) Peer median: AJG · AON · WLTW · BRO · ICE
Component scores from the live moat model. Peer median illustrative.

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3.8 · Employees (SEC filings)



16 CORPORATE INFORMATION — KEY OFFICERS 95,000 employees

OFFICER	TITLE
John Quinlan Doyle	President, Chief Executive Officer & Director
Martin C. South	Senior VP & Chief Client Officer
Dean Klisura	Vice Chair, President & CEO of Marsh Re
Mark Christopher McGivney	Executive VP, CFO & COO

17 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.

18 EXPANDED RATIO ANALYSIS (I) live ratio engine · profitability · valuation

RATIO	TTM	TREND
PROFITABILITY		
ROE	27%	
ROA	6.8%	
ROIC	11.8%	
Gross margin	42.8%	
Operating margin	21.4%	
Net margin	14.2%	
EBITDA margin	21.1%	
FCF margin	—	
VALUATION		
P/E	22.4	
P/B	6.1	
P/S	3.16	
P/FCF	21.6	
EV/EBITDA	18.4	
EV/Revenue	3.9	
Earnings yield	4.51%	
FCF yield	4.62%	

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EXPANDED RATIO ANALYSIS (II)		leverage · solvency
RATIO	TTM	TREND
LEVERAGE & SOLVENCY		
Current ratio	1.09	
Quick ratio	1.09	
Debt / equity	1.52	
Debt / assets	37.3%	
Net debt / EBITDA	3.41	
Interest coverage	—	

EXPANDED RATIO ANALYSIS (III)		efficiency · growth · per-share · scores	
RATIO		TTM	TREND
EFFICIENCY			
Asset turnover		0.48	
Receivables turnover		3.3	
DSO (days)		110	
DPO (days)		80	
Cash conversion cycle		29	
GROWTH (YoY)			
Revenue growth		—	
Net income growth		—	
EPS growth		—	
FCF growth		—	
PER SHARE (\$)			
EPS (diluted, TTM)		8.49	
Book value / share		31.32	
Revenue / share		59.79	
FCF / share		8.73	
Cash / share		3.87	
SHAREHOLDER RETURN & SCORES			
Buyback yield		1.06%	
Altman Z-Score		2.7	
Piotroski F-Score		7/9	
Beneish M-Score		—	

19 EARNINGS QUALITY PANEL				live scores
MODEL	SCORE	ZONE	NOTE	
Piotroski F-Score	7 / 9	Strong		
Altman Z-Score	2.7	Grey zone	Grey	
Income quality	1.29	Cash-backed	OCF ÷ net income	

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20 DUPONT & GROWTH QUALITY				live analysis engine	
DUPONT DECOMPOSITION (TTM)		VALUE	GROWTH QUALITY (LIVE)		VALUE
Tax burden		0.75	Revenue stability		—
Interest burden		1.05	Earnings stability		—
Operating margin		17.9%	Earnings persistence		—
Asset turnover		0.48×	Revenue CAGR 3y		—
Financial leverage		4.08×	EPS CAGR 3y		—
= ROE		28%	FCF CAGR 3y		—

SHAREHOLDER RETURN PROFILE				live	
BUYBACK YIELD		DIVIDEND YIELD	TOTAL SHAREHOLDER RETURN	SBC / REVENUE	
1.06%		2.01%	3.23%	1.4%	
			cash yield	dilution pressure	

21 PEER COMPARISON							live peer engine	
COMPANY	MKT CAP	P/E	ROE	NET MARGIN	REV GROWTH	PIOTROSKI	1-YR RET	
AJG	\$65.3B	41.8	7%	8.1%	+26.3%	7/9	-8.8%	
AON	\$62.1B	16.0	45%	13.0%	+4.9%	8/9	-13.9%	
WLTW	\$24.7B	14.3	20%	9.3%	+6.7%	6/9	—	
BRO	\$23.2B	19.2	10%	17.2%	+39.6%	7/9	-20.4%	
ICE	\$90.7B	22.7	14%	35.9%	-0.6%	8/9	+5.7%	
HOOD	\$88.9B	42.8	24%	42.9%	+38.3%	3/9	—	
USB	\$91.5B	11.4	13%	19.9%	+3.3%	8/9	—	
PNC	\$86.7B	11.6	13%	22.6%	+3.9%	4/9	—	

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

22

ANALYST CONSENSUS & ESTIMATES

live consensus

Hold

34 Analysts

Str Sell (0)

Sell (1)

Hold (22)

Buy (10)

Str Buy (1)

MEAN TARGET (QTR)

\$199.67

9 targets

TARGET VS. PRICE

+6.0%

last-quarter mean

NEXT REPORT

2027-02-04

street \$2.20

CONSENSUS ESTIMATES	REVENUE MEAN	HIGH / LOW	EPS MEAN	HIGH / LOW	# EPS EST.
FY2026	\$28.65B	\$28.79B / \$28.56B	\$10.46	\$10.56 / \$10.33	13
FY2027	\$30.09B	\$30.29B / \$29.75B	\$11.45	\$11.65 / \$10.95	14
FY2028	\$31.69B	\$32.76B / \$30.67B	\$12.57	\$13.13 / \$11.76	4

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23 STREET TARGETS & THIRD-PARTY RATING

live targets + composite

Street Price Target — Trajectory

WINDOW	AVG TARGET	VS. PRICE	# TARGETS
Last Month	\$203.00	+7.8%	3
Last Quarter	\$199.67	+6.0%	9
Last Year	\$202.52	+7.5%	31
All Time	\$202.94	+7.7%	70

Rolling mean of published targets vs. last close \$188.35. Aggregated from StreetInsider, Benzinga.

Third-Party Composite Rating

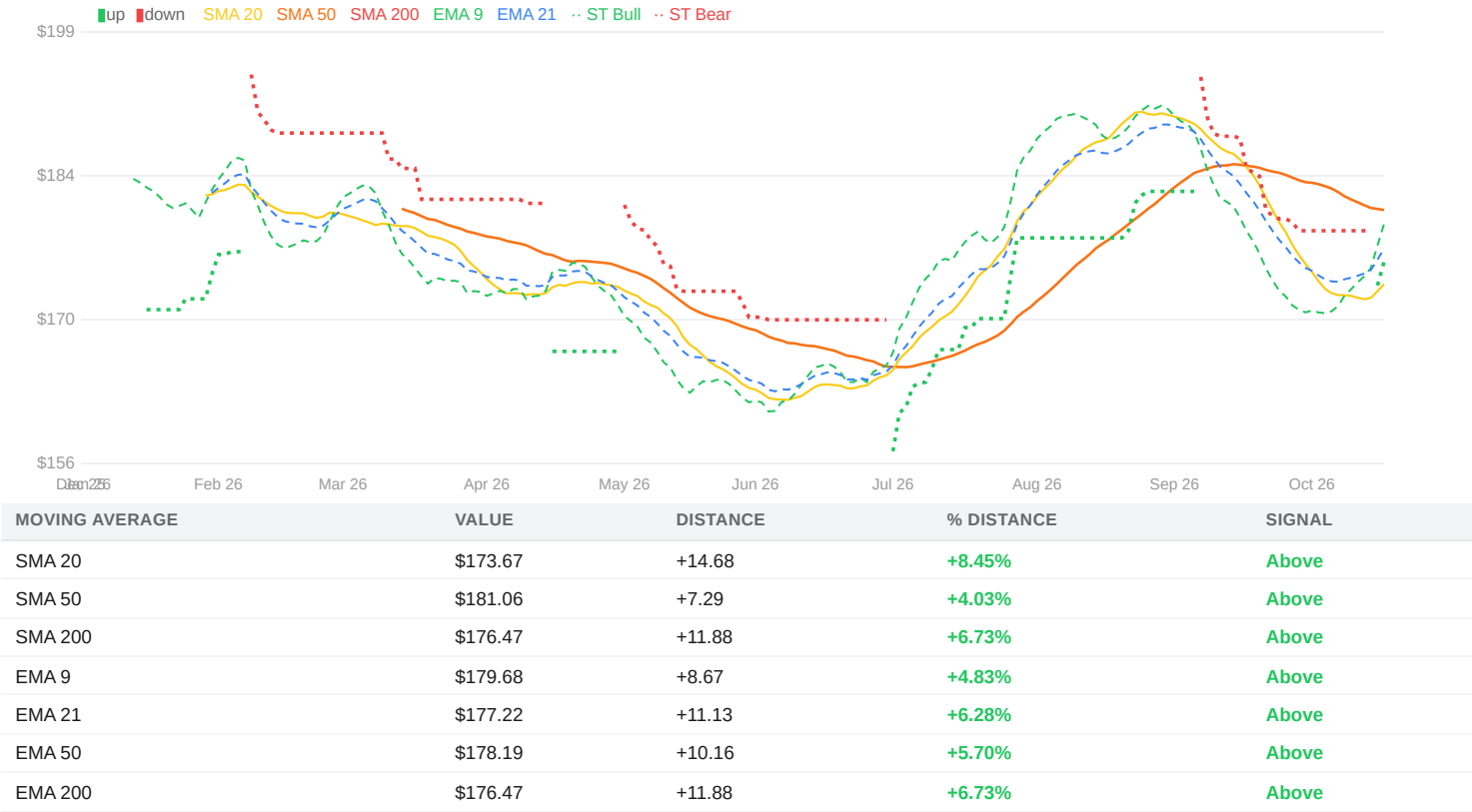
B+

DCF4/5ROE5/5ROA5/5DEBT/EQ2/5P/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.

MOVING AVERAGE RIBBON & TREND

site technicals-tab chart, live indicator history



24 TECHNICAL POWER SCORE

EDGE · site engine · 86/100 composite

TECHNICAL VERDICT

BULLISH

Power Score +72

21 of 22 indicator votes bullish

Family Scores (site weights)

Trend 30%100

Momentum 25%91

Volume 20%94

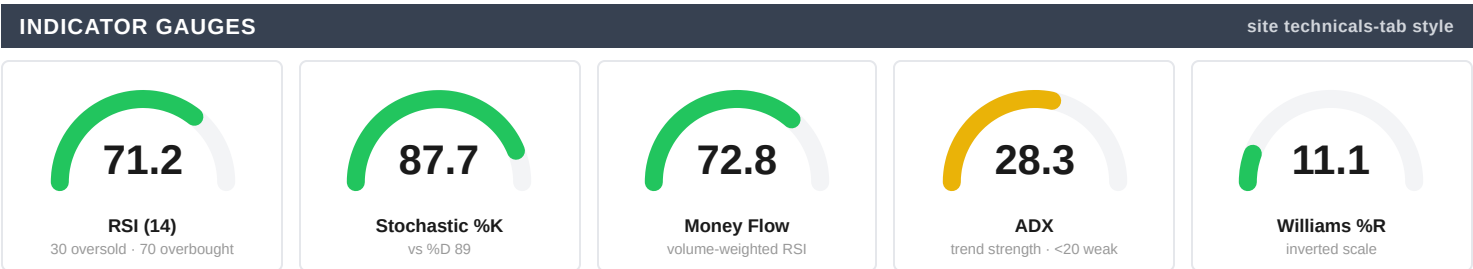
Volatility 10%67

Patterns 15%50

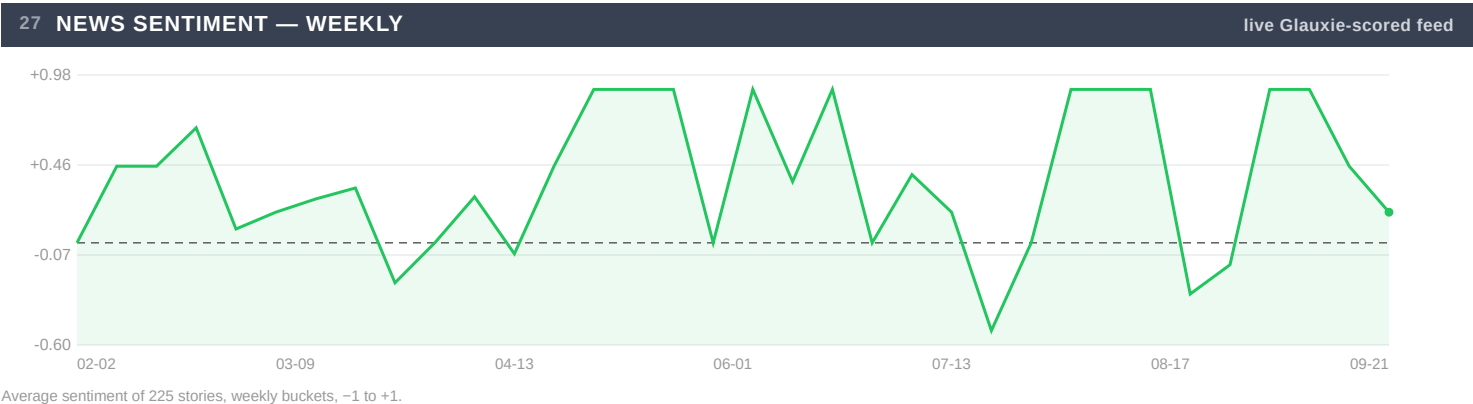
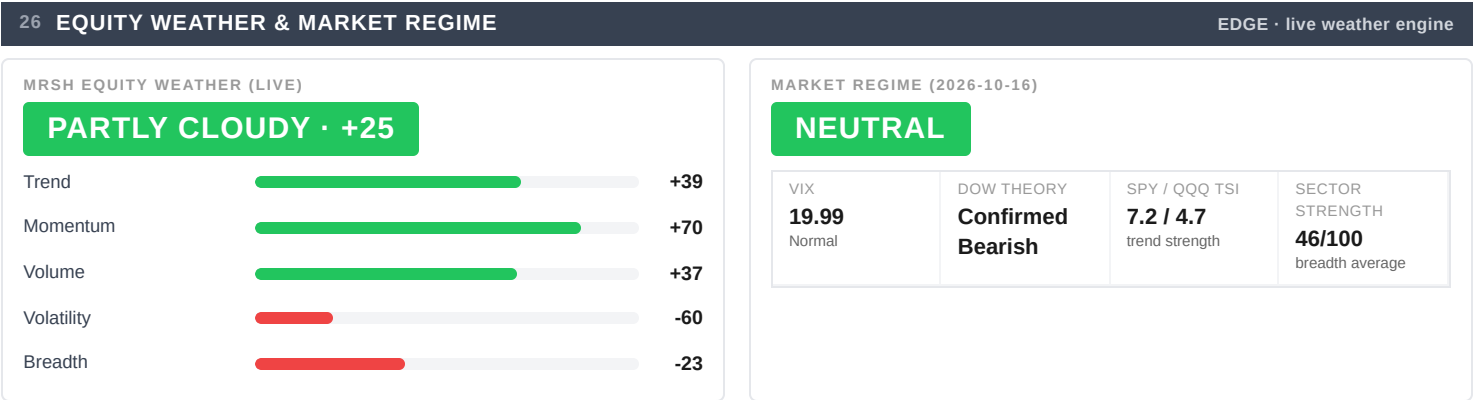
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INDICATOR VOTE GRID				21 bull / 1 bear	
● Price vs SMA 20	\$173.67	● Price vs SMA 50	\$181.06	● Price vs SMA 200	\$176.47
● EMA 9/21 Cross	179.7/177.2	● SMA 50/200	Golden	● ADX Direction	ADX 28
● Supertrend	\$176	● Parabolic SAR	\$171	● SMA Slope	0.720
● RSI	71.2	● Stochastic K/D	88/89	● StochRSI K/D	100/100
● Williams %R	-11	● CCI	228	● TSI vs Signal	7.9
● CMO	42.4	● ROC	10.73%	● OBV Signal	Accum
● Chaikin MF	0.100	● MFI	73	● Force Index	6M
● Elder Ray Bull	12.69				



25 KEY LEVELS & VOLATILITY				live indicator table	
LEVEL	VALUE	LEVEL	VALUE		
Pivot / R1 / R2	\$186.26 / \$191.32 / \$196.10	S1 / S2	\$181.48 / \$176.42		
Bollinger (20,2)	\$162.63 – \$184.71	Squeeze	Off		
ATR (14)	\$3.98 (2.1%)	Historical vol	21.3%		



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28 WEATHER - COMPANY VS INDUSTRY, SECTOR, UNIVERSE

EDGE · live weather engine · Partly Cloudy

OVERALL +25.2 +30.7 vs industry	TREND +39.0 +44.1 vs industry	MOMENTUM +69.6 +63.1 vs industry	VOLUME +37.0 +37.0 vs industry
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READING	MRSH	INSURANCE - BROKERS N=53	FINANCIAL SERVICES N=24,134	ALL US SYMBOLS N=70,435
Overall	+25.2	-5.5	-16.3	-20.5
Trend	+39.0	-5.2	-12.5	-21.3
Momentum	+69.6	+6.5	-4.4	-15.8
Volume	+37.0	+0.0	+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.

29 EXECUTIVE COMPENSATION

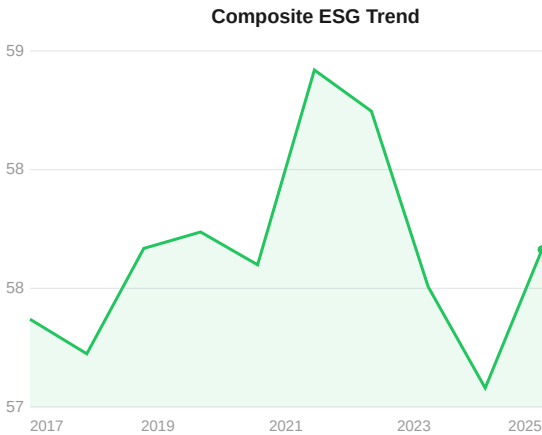
live proxy data · FY2017

EXECUTIVE	TOTAL COMP	STRUCTURE
Daniel Glaser President and CEO,	\$17.0M	56% equity+incentive
Companies, and CEO, Marsh	\$7.4M	66% equity+incentive
McLennan Inc.	\$6.9M	72% equity+incentive
Companies, Mark C. Chief Financial Officer,	\$5.2M	52% equity+incentive
Marsh McLennan Inc. President	\$4.4M	57% equity+incentive

30 ESG ASSESSMENT

live disclosure-derived scores

PILLAR (LIVE DISCLOSURE SCORES)	SCORE
Environmental	56
Social	57
Governance	62
Composite ESG	58



31 8-K MATERIAL EVENTS

live EDGAR feed

FILED	8-K CONTENTS	ITEMS
2026-10-15	Earnings Release; Exhibits	2.02,9.01
2026-07-21	Earnings Release; Exhibits	2.02,9.01
2026-06-04	Material Agreement; Termination of Agreement; Exhibits	1.01,1.02,9.01
2026-05-22	Shareholder Vote	5.07
2026-04-16	Earnings Release; Exhibits	2.02,9.01
2026-04-14	Officer/Director Change; Exhibits	5.02,9.01
2026-03-10	Departure/Election of Directors; Appointment of Officers	5.02
2026-02-25	Departure/Election of Directors; Appointment of Officers	5.02

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32 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.

33 DISCLOSURES

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34 DATA PROVENANCE FOR THIS REPORT sources · coverage · method

DATA DOMAIN	SOURCE	COVERAGE FOR THIS REPORT
Price & volume	market_db.historical_prices	not present for this symbol
Fundamentals	income_statements_annual	not present for this symbol
Reported vs consensus	fact/earnings_calendar	24 rows · 2021-01-28 to 2026-10-15
Analyst estimates	dim/forward_estimates	3 rows · 2026-12-31 to 2028-12-31
Institutional ownership (13F)	holdings_db.institutional_ownership_summary	not present for this symbol
Insider transactions (Form 4)	edgar/form4	12 rows · 2026-08-14 to 2026-09-02
Proposed sales (Form 144)	edgar/form144	1 record
Beneficial ownership (13D/G)	edgar/13dg	2 rows · 2026-03-27 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.