

ON Semiconductor Corporation (ON)

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
\$72.02	\$28.0B	\$134.92	45.6	37.4%	8%	7/9	+36.0%
2026-10-16	VOLUME	52-WK LOW	P/S	NET MARGIN	ROIC	ALTMAN Z	5-YR RETURN
	9.2M	\$44.56	4.52	10.2%	5%	4.7	+296.4%

ON Semiconductor Corporation operates as a global provider of sophisticated power and sensing solutions. Their cutting-edge power innovations are pivotal in modernizing various sectors: they contribute to the development of lighter, extended-range electric vehicles, underpin rapid-charging infrastructure, and bolster sustainable energy initiatives for applications such as solar arrays, industrial power systems, and energy storage. The company's operations are structured into three main divisions: the Power Solutions Group, the Advanced Solutions Group, and the Intelligent Sensing Group. ON Semiconductor offers a broad array of semiconductor products, including analog components, discrete devices, modules, and integrated circuits. These products are designed to perform numerous critical functions, such as power switching, energy conversion, signal conditioning, circuit protection, signal amplification, and voltage regulation. Beyond these standard offerings, the firm also designs and develops specialized analog, mixed-signal, advanced logic, application-specific integrated circuits (ASICs) and standard products, radio frequency (RF) components, and integrated power management solutions, catering to a diverse range of end-market consumers. Furthermore, it provides foundry and design services specifically for government clients. The company's portfolio also encompasses advanced imaging technologies. This includes the creation of complementary metal-oxide-semiconductor (CMOS) image sensors, sophisticated image signal processors, and single photon detectors like silicon photomultipliers (SiPMs) and single-photon avalanche diode (SPAD) arrays. Additionally, ON Semiconductor produces actuator drivers essential for autofocus and image stabilization, serving a wide spectrum of end-users across numerous industries. Established in 1992, ON Semiconductor Corporation is headquartered in Phoenix, Arizona.

SECTOR Technology INDUSTRY Semiconductors EXCHANGE NASDAQ MARKET CAP \$28.0B EMPLOYEES 22,600 (SEC-filed) CEO Hassane S. El-Khoury IPO 2000-05-02
COUNTRY US
5701 North Pima Road, Scottsdale, AZ 85250 · Tel 602 244 6600 · onsemi.com

1 INSIDERSTREET SCORE

INSIDERSTREET SCORE

67 / 100

Street mean **\$84.91** (11 analysts, last qtr) — their number, not ours

INSIDER CONSENSUS SIGNAL

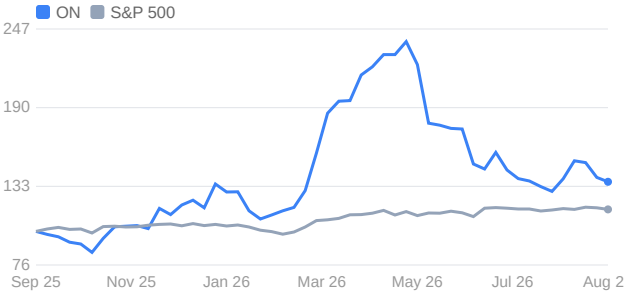
ROUTINE SELLING — LOW SIGNAL

\$10M sold / 6 mo, zero open-market buys

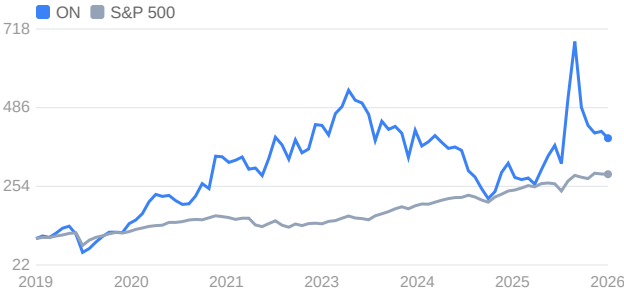
2 PRICE AND VOLUME

adjusted close, prod data layer

1 Year vs S&P 500 · ON +36.0% · S&P 500 +15.9% · spread +20.1pp



7 Years vs S&P 500 · ON +296.4% · S&P 500 +189.9% · spread +106.5pp



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

67

OF 100

Score Breakdown

Profitability	44/100
Growth	54/100
Momentum	83/100
Quality	72/100
Earnings Quality	70/100
Balance Sheet	88/100
Value	35/100
Risk (safety)	100/100
Overall	66.7/100

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
GFS	59
CRDO	79
Q	54
TSEM	70
ENTG	60
MTSI	63
ON	67

IS Score Trend — quarterly



4 TWO READINGS business vs price

BUSINESS QUALITY

67 / 100

IS Score 66.7 / 100 · -7.3 from peak of 74

Quarter	Business Quality
23 Q1	74
23 Q2	68
23 Q3	62
23 Q4	58
24 Q1	62
24 Q2	58
24 Q3	51
24 Q4	44
25 Q1	44
25 Q2	51
25 Q3	50
25 Q4	52
26 Q1	67

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

PRICE STRUCTURE

BEARISH

Technical Score 21 / 100 · Power -58 · 2 of 22 indicator votes bullish

Date	Vote Share
07-23	10%
08-13	10%
09-03	10%
09-13	50%
09-23	10%
09-25	96%
10-05	65%
10-16	4%

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 67, price structure 21 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 66.7	would move us up one band
IS Score stops falling - one quarter higher than the prior	last four: 51 → 51 → 52 → 67	the direction matters more than the level
Technical vote share back above 50%	now 9%	price structure no longer broken
Institutional holder count rises two quarters running	peak 1,005 → now 1,005	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

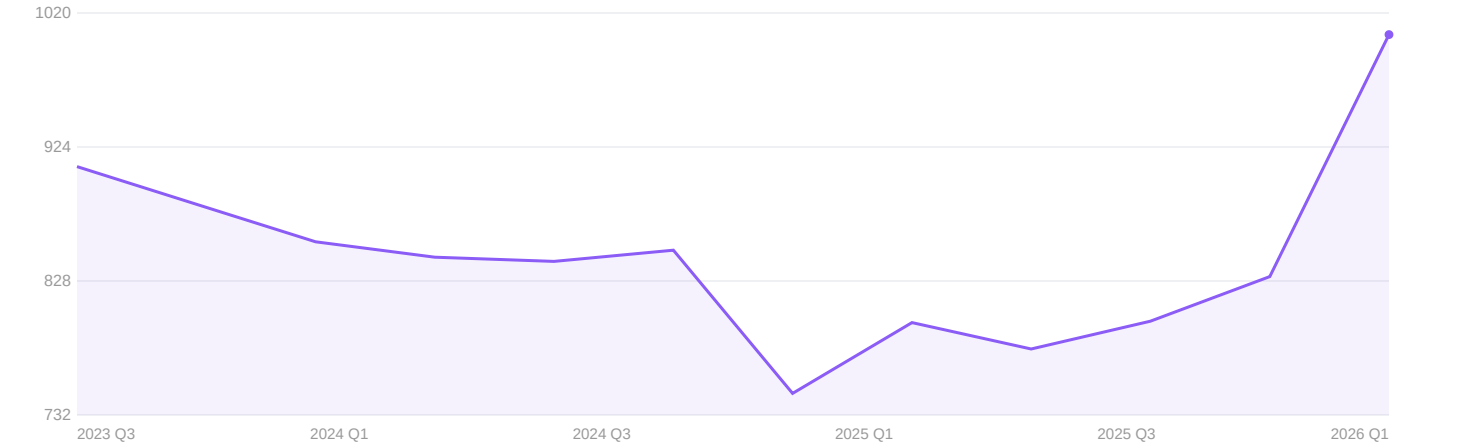
SITE CONVERGENCE SCORE 2 of 4 top 13% of 29,420 symbols	SOURCES ALIGNED — of 3 independent disclosures	CONGRESS (180D) 4 buys 2026-09-28	INSIDER BUYS (180D) 0 none disclosed
ETF FUNDS (30D) 1208 up / 1000 down net +208 funds			

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 1,005 · latest 1,005 (+0 from peak).

Quarter	Holders	13F Shares	Value	Reported Own%	Guard
2026 Q2	1,005	403.7M	\$37.7B	103.4%	ex-outlier 88.9%
2026 Q1	831	406.6M	\$24.6B	104.2%	ex-outlier 89.3%
2025 Q4	799	421.8M	\$22.4B	108.1%	
2025 Q3	779	427.1M	\$21.2B	109.4%	
2025 Q2	798	433.7M	\$22.5B	111.1%	
2025 Q1	747	418.2M	\$17.9B	107.2%	
2024 Q4	850	419.5M	\$26.0B	107.5%	
2024 Q3	842	421.9M	\$30.0B	108.1%	
2024 Q2	845	414.6M	\$28.1B	106.2%	
2024 Q1	856	415.7M	\$30.1B	106.5%	
2023 Q4	883	418.0M	\$34.5B	107.1%	
2023 Q3	910	414.7M	\$38.1B	106.2%	

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.

Why 2026-06 reads 103.44%. Institutions cannot hold more of a company than exists. The reported 403.7M shares exceed the 390.3M outstanding, and a single filer accounts for the excess: **FMR LLC** reports 56,679,393 shares against 58,158,341 the prior quarter, a 1x jump, which alone would be 14.5% of the company. Excluding that filing, ownership is 88.9%. We publish both figures. 13F filings are due 45 days after quarter end and amendments keep arriving after that, so the newest quarter is provisional by construction - this is what an unsettled quarter looks like.

Why 2026-03 reads 104.18%. Institutions cannot hold more of a company than exists. The reported 406.6M shares exceed the 390.3M outstanding, and a single filer accounts for the excess: **FMR LLC** reports 58,158,341 shares against 59,372,112 the prior quarter, a 1x jump, which alone would be 14.9% of the company. Excluding that filing, ownership is 89.3%. We publish both figures. 13F filings are due 45 days after quarter end and amendments keep arriving after that, so the newest quarter is provisional by construction - this is what an unsettled quarter looks like.

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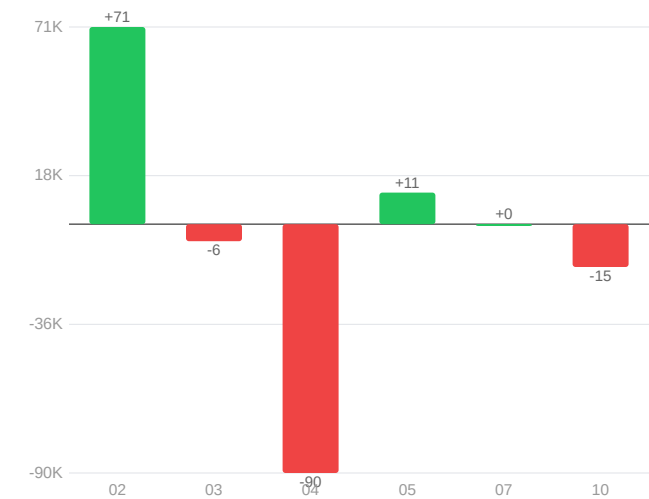
8 INSIDER ACTIVITY live Form 4 data

INSIDER	ROLE	DATE	TYPE	SHARES	VALUE	POST-TXN OWNED
Mascarenas Paul Anthony	director	2026-10-02	A-Award	126	\$0.01M	57,716
Gopalswamy Sudhir	Group President, AMG & ISG	2026-10-01	SELL	15,578	\$1.25M	158,177
Mascarenas Paul Anthony	director	2026-07-02	A-Award	116	\$0.01M	57,590
Gopalswamy Sudhir	Group President, AMG & ISG	2026-05-26	TAX W/H	470	\$0.06M	173,588
Deitrich Thomas	director	2026-05-14	A-Award	1,986	—	26,060
Waters Gregory L	director	2026-05-14	A-Award	1,986	—	24,524
Carter Susan K	director	2026-05-14	A-Award	1,986	—	25,638
Yan Christine Y	director	2026-05-14	A-Award	1,986	—	48,655

9 SELL DECOMPOSITION — ROUTINE VS. DISCRETIONARY EDGE

6-MO DECOMPOSITION (FORM 4)	TXNS	SHARES	VALUE	SIGNAL WEIGHT
S — Open-market sales	5	111,692	\$9.8M	Counted
F — Tax withholding	1	470	\$0.1M	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 \$9.8M 5 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
2026-10-01	Gopalswamy Sudhir	15,578	\$1.2M
2026-06-10	Alan Campbell	16,660	\$1.8M
2026-06-03	Keeton Simon	19,902	\$2.6M
2026-05-15	Alan Campbell	22,188	\$2.5M
Trailing 12 mo	13 filings	340,302	\$28M

11 13D / 13G STAKES COND

FILED	FORM	REPORTING PERSON	% OF CLASS	SHARES
2026-10-07	SCHEDULE 13G/A	Abigail P. Johnson	8.20%	31.9M sh
2026-04-30	SCHEDULE 13G	Vanguard Capital Management	7.50%	29.6M sh
2026-04-29	SCHEDULE 13G	Vanguard Portfolio Management	5.10%	20.1M sh
2026-01-30	SCHEDULE 13G/A	The Vanguard Group	12.69%	51.1M sh

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12 CONGRESSIONAL TRADING					EDGE · STOCK Act
MEMBER	CHAMBER	TRADE	SIZE BAND	TRADED	DISCLOSED
Gilbert Cisneros	House	BUY	\$15,001 - \$50,000	2026-09-28	2026-10-13
Gilbert Cisneros	House	BUY	\$15,001 - \$50,000	2026-09-28	2026-10-12
Ro Khanna	House	BUY	\$15,001 - \$50,000	2026-09-23	2026-10-09
Sheldon Whitehouse	Senate	SELL	\$1,001 - \$15,000	2018-09-28	2018-10-22
Sheldon Whitehouse	Senate	SELL	\$1,001 - \$15,000	2018-09-28	2018-10-21
Sheldon Whitehouse	Senate	SELL	\$1,001 - \$15,000	2018-09-28	2018-10-21
HOUSE 12-MO 5 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) 831	13F SHARES 407M 104.2% of shares out	NEW / CLOSED 142 / 92 positions, QoQ	INCREASED / REDUCED 290 / 278 positions, QoQ	
PUT/CALL (13F) 0.91 option positions	FREE FLOAT 99.6% 388M sh			

2.8 · Largest Reporting 13F Managers

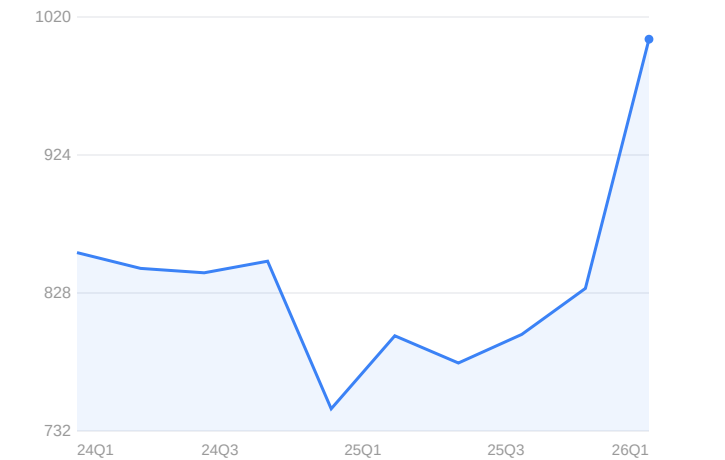
MANAGER	SHARES	VALUE
Assenagon Asset Management S.A.	3.0M	\$233M
Atwood & Palmer Inc	219,533	\$17M
Portman Square Capital Llp	141,288	\$11M
Counterpoint Mutual Funds Llc	138,377	\$11M
Mn Services Vermogensbeheer B.V.	114,120	\$9M
Czech National Bank	111,859	\$9M

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

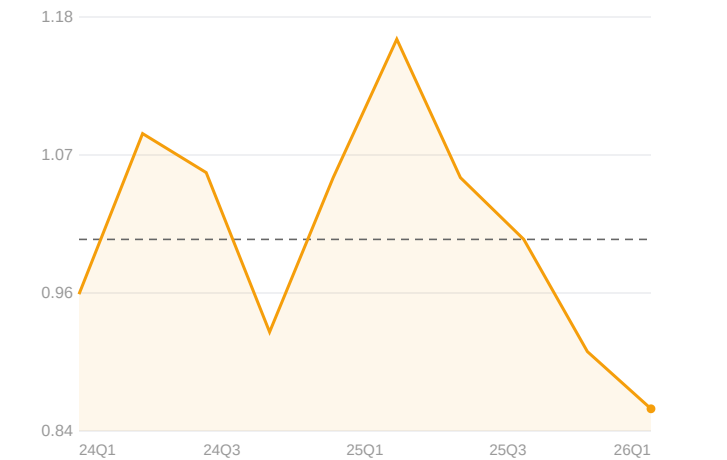
2.9 · Top ETF & Fund Ownership

FUND	WEIGHT	POSITION
FSELX	3.6%	\$1.6B
VITSX	0.0%	\$950M
VSMPX	0.0%	\$950M
VTSAX	0.0%	\$950M
VTI	0.0%	\$950M
VOO	0.0%	\$786M

13F Filers Holding ON — quarterly



Institutional Put/Call — quarterly

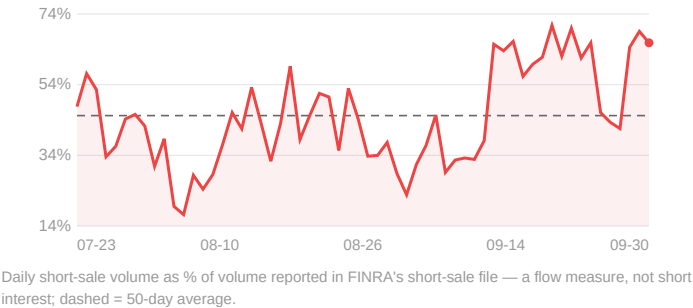


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14 SHORT VOLUME — DAILY, 60 SESSIONS

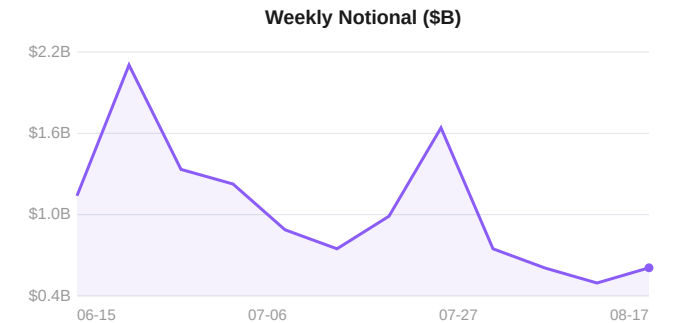
EDGE · live FINRA feed



LATEST SESSION 66.0% 2026-10-15	20-DAY AVG 57.1% 50-day 45.5%	TREND Rising 20d vs 50d	BY MARKET CENTER Q: 66% · N: 59% · B: 45% latest session
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15 DARK POOL ACTIVITY

EDGE · live ATS data

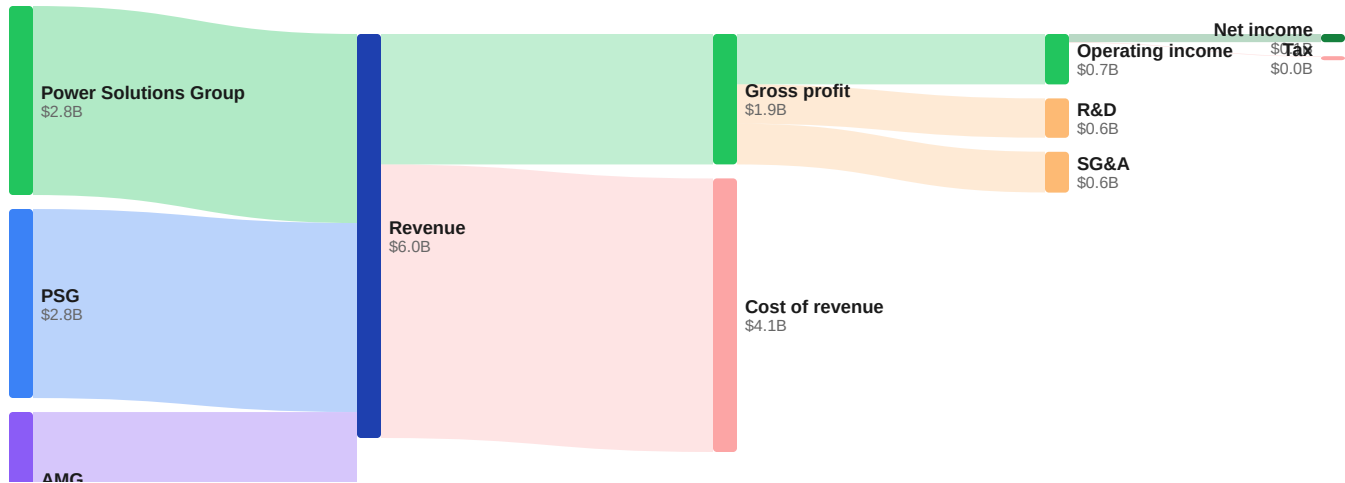


Where ON Trades in the Dark

ATS VENUE (4-WK)	SHARES	AVG TRADE
Ubsa Ubs Ats	9.0M	65 sh
Incr Intelligent Cross Llc	8.2M	58 sh
Sgmt Sigma X2	5.1M	68 sh
Pure Purestream	5.0M	47 sh
Ebxl Level Ats	4.9M	39 sh
Mstx Ms Trajectory Cross (Ats-1)	4.7M	87 sh

16 REVENUE FLOW — FY2025

live segmentation + income data



17 GEOGRAPHIC REVENUE

live segmentation

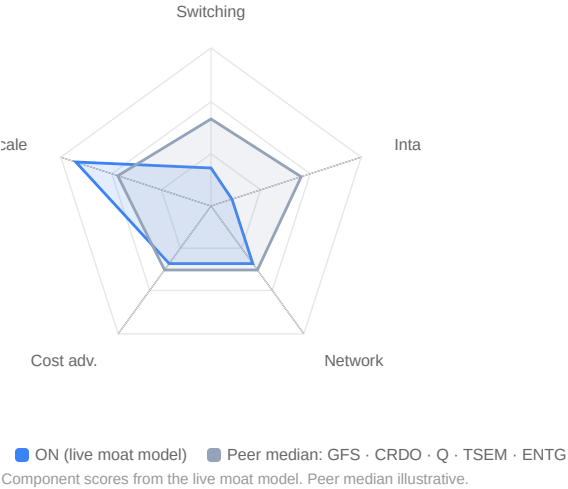
REGION	REVENUE	SHARE
Other Geographical Areas	\$531M	100%

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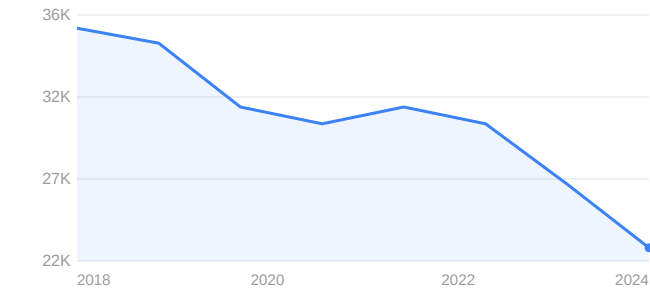
18 MOAT & COMPETITIVE POSITION

LIVE MODEL · 39/100 NONE

Moat score 39/100 — None; primary source Efficient Scale.



3.8 · Employees (SEC filings)



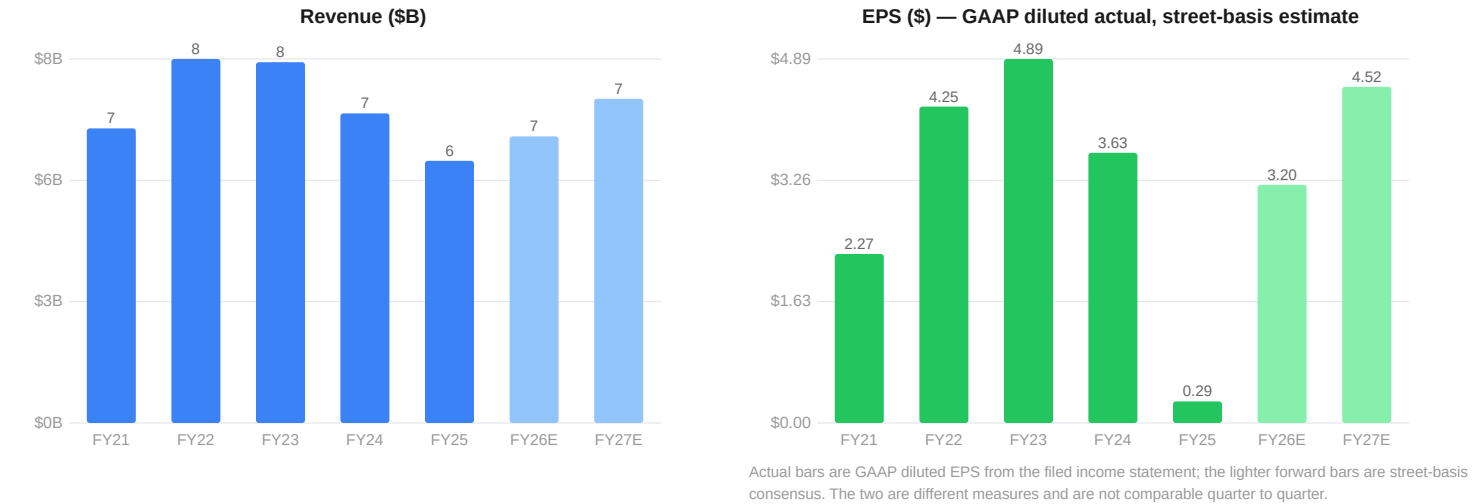
19 CORPORATE INFORMATION — KEY OFFICERS

22,600 employees

OFFICER	TITLE
Hassane S. El-Khoury	President, Chief Executive Officer & Director
S. Thad Trent	Executive Vice President, Chief Financial Officer, Treasurer & Principal Accounting Officer
Thad Trent	Executive Vice President, Chief Financial Officer, Treasurer & Principal Accounting Officer
Sudhir Gopalswamy	Group President of Intelligent Sensing & Analog and Mixed Signal Group

20 REVENUE & EPS — HISTORY AND ESTIMATES

live consensus



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21 ESTIMATE VS. ACTUAL & SURPRISES

live data



22 REPORTED VS. CONSENSUS — FULL HISTORY

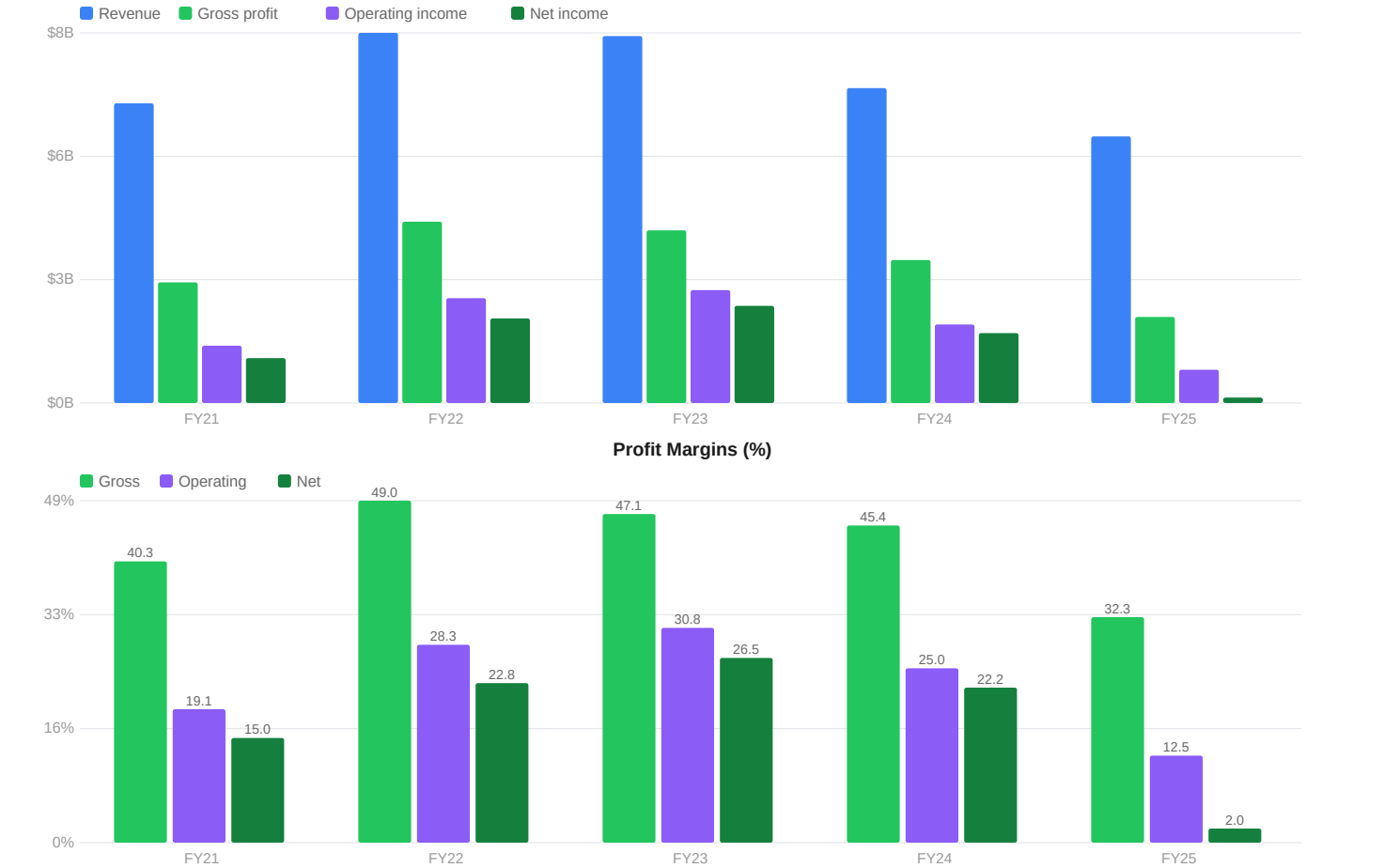
0 quarters · live data

BEAT RATE —% 0 of 0 quarters		CURRENT STREAK 0 longest 0		AVG EPS SURPRISE —% median —%		SURPRISE TREND — last 4 vs prior 4	
PERIOD	EPS EST.	EPS ACTUAL	EPS SURPRISE	REV EST. (\$M)	REV ACTUAL (\$M)	REV SURPRISE	

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.

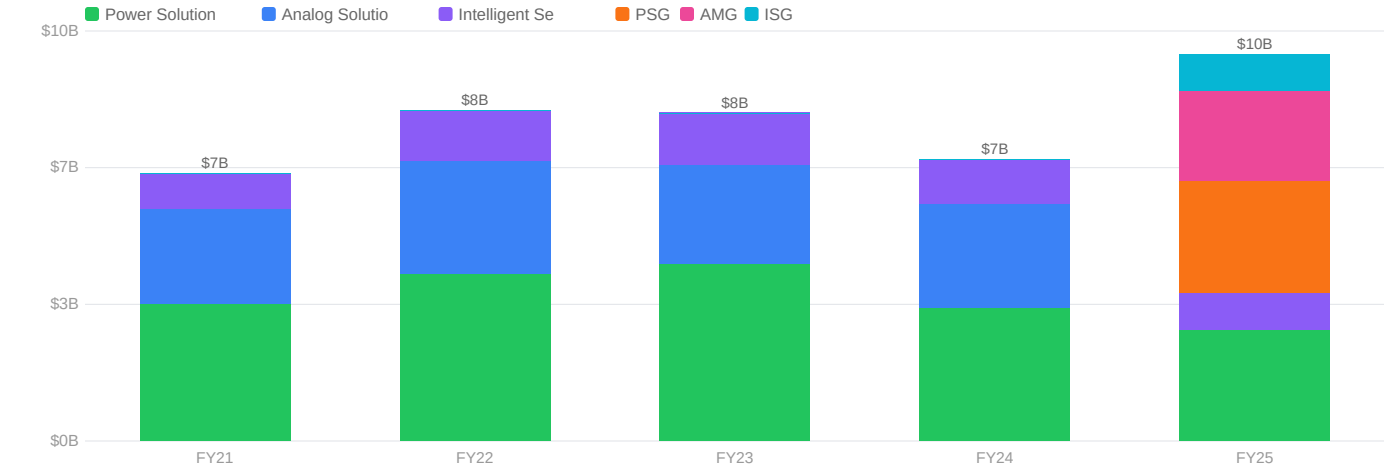
INCOME TRENDS — 5 YEAR

live financials



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Revenue by Segment — Stacked



Live segmentation data.

YoY Growth Heatmap — Income Lines

YOY GROWTH	FY21	FY22	FY23	FY24	FY25
Revenue	+28.3%	+23.5%	-0.9%	-14.2%	-15.3%
Gross profit	+58.2%	+50.2%	-4.8%	-17.2%	-39.8%
Operating income	+269.3%	+83.3%	+7.6%	-30.4%	-57.7%
Net income	+331.1%	+88.4%	+14.8%	-28.0%	-92.3%

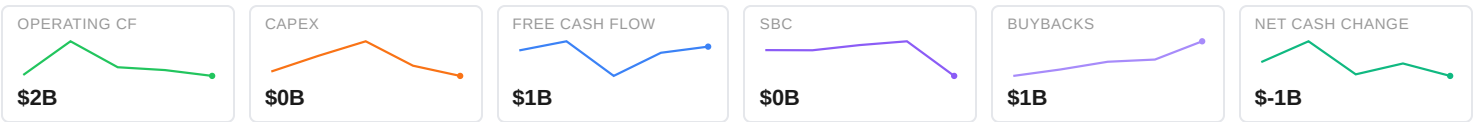
23 INCOME STATEMENT — FULL

live financials

\$B · FY ENDS	FY21	FY22	FY23	FY24	FY25	TREND
Revenue	6.7	8.3	8.3	7.1	6.0	
Cost of revenue	4.0	4.2	4.4	3.9	4.1	
Gross profit	2.7	4.1	3.9	3.2	1.9	
R&D expense	0.7	0.6	0.6	0.6	0.6	
SG&A expense	0.6	0.6	0.6	0.6	0.6	
Operating income	1.3	2.4	2.5	1.8	0.7	
EBITDA	1.9	3.0	3.2	2.5	0.9	
D&A	0.6	0.6	0.6	0.6	0.7	
Pretax income	1.2	2.4	2.5	1.8	0.1	
Income tax	0.1	0.5	0.4	0.3	0.0	
Net income	1.0	1.9	2.2	1.6	0.1	
Diluted EPS (\$)	2.27	4.25	4.89	3.63	0.29	
Diluted shares (M)	444	448	447	433	412	

CASH FLOW TRENDS

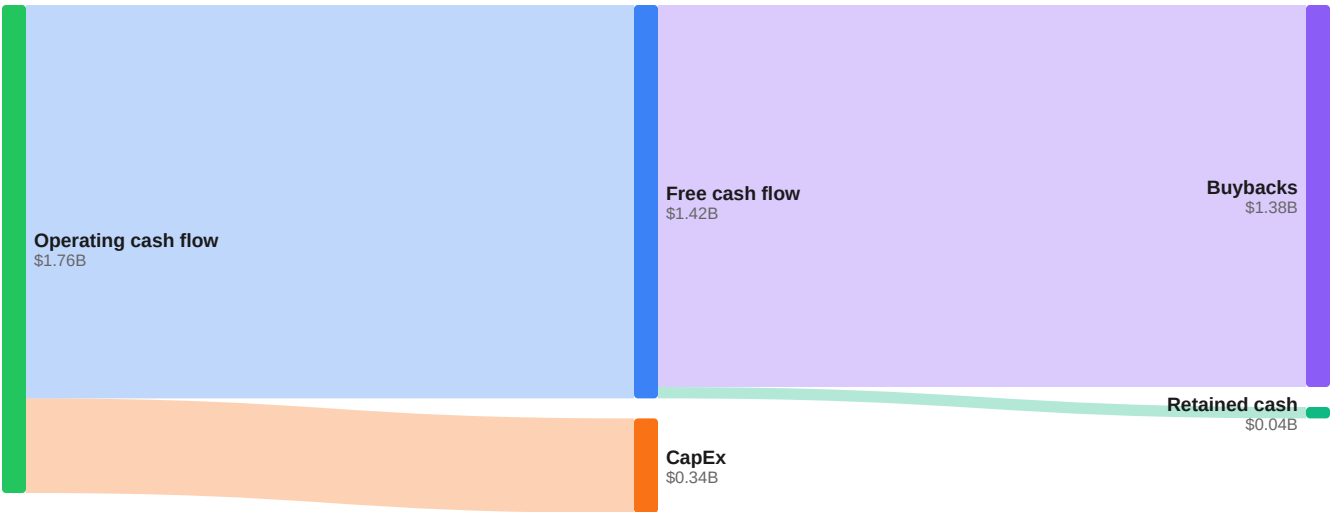
live data



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WHERE THE CASH WENT — FY2025

cash Sankey, live data



Balance Sheet — Full

\$B	FY22	FY23	FY24	FY25	
Cash & equivalents	2.9	2.5	2.7	2.1	
ST investments	0.0	0.0	0.3	0.4	
Receivables (net)	0.8	0.9	1.2	1.0	
Total current assets	5.7	5.9	6.8	5.8	
PP&E (net)	3.5	4.4	4.4	3.4	
Goodwill + intangibles	1.9	1.9	1.8	2.0	
Total assets	12.0	13.2	14.1	12.5	
Accounts payable	0.9	0.7	0.6	0.6	
Short-term debt	0.1	0.8	0.0	0.0	
Deferred revenue	0.0	0.1	0.1	0.1	
Total current liabilities	2.1	2.2	1.3	1.3	
Long-term debt	3.0	2.5	3.3	3.2	
Total liabilities	5.8	5.4	5.3	4.8	
Shareholders' equity	6.2	7.8	8.8	7.7	

Cash Flow Statement — Full

\$B	FY22	FY23	FY24	FY25	
Net income	1.9	2.2	1.6	0.1	
D&A	0.6	0.6	0.6	0.7	
Stock-based compensation	0.1	0.1	0.1	0.0	
Working capital change	(0.3)	(0.9)	(0.4)	0.5	
Operating cash flow	2.6	2.0	1.9	1.8	
Capital expenditures	(1.0)	(1.5)	(0.7)	(0.3)	
Investing cash flow	(0.7)	(1.7)	(1.0)	(0.5)	
Buybacks	(0.3)	(0.6)	(0.7)	(1.4)	
Dividends paid	0.0	0.0	0.0	0.0	
Debt issuance / (repay)	(0.0)	0.1	(0.0)	(0.4)	
Financing cash flow	(0.4)	(0.7)	(0.7)	(1.8)	
Free cash flow	1.6	0.4	1.2	1.4	

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24 EXPANDED RATIO ANALYSIS (I)

live ratio engine · profitability · valuation

RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
PROFITABILITY							
ROE	24.9%	35.3%	31.3%	19.0%	1.5%	8%	
ROA	11.0%	17.6%	17.3%	11.5%	0.9%	4.7%	
ROIC	18.8%	34.3%	25.3%	16.5%	1.5%	5.2%	
Gross margin	40.3%	49.0%	47.1%	45.4%	32.3%	37.4%	
Operating margin	19.1%	28.3%	30.8%	25.0%	12.5%	11.7%	
Net margin	15.0%	22.8%	26.5%	22.2%	2.0%	10.2%	
EBITDA margin	28.0%	36.1%	39.0%	35.9%	14.8%	24.9%	
FCF margin	19.1%	19.2%	7.7%	17.1%	28.2%	—	
VALUATION							
P/E	29.96	14.69	16.81	17.22	180.04	45.6	
P/B	6.60	4.51	4.72	3.08	2.84	3.9	
P/S	4.49	3.36	4.45	3.82	3.63	4.52	
P/FCF	23.45	17.52	57.52	22.34	12.88	15.8	
EV/EBITDA	16.97	9.39	11.67	10.80	25.56	18.8	
EV/Revenue	4.75	3.39	4.55	3.88	3.79	4.7	
Earnings yield	3.3%	6.8%	5.9%	5.8%	0.6%	2.24%	
FCF yield	4.3%	5.7%	1.7%	4.5%	7.8%	6.32%	

EXPANDED RATIO ANALYSIS (II)

leverage · solvency

RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
LEVERAGE & SOLVENCY							
Current ratio	2.45	2.78	2.71	5.06	4.52	3.46	
Quick ratio	1.56	2.00	1.74	3.38	2.98	2.49	
Debt / equity	0.68	0.52	0.43	0.38	0.45	0.62	
Debt / assets	32.2%	27.0%	25.4%	23.9%	27.7%	33.2%	
Net debt / EBITDA	0.93	0.10	0.27	0.15	1.04	0.63	
Interest coverage	9.88	25.89	34.90	30.49	2.85	—	

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EXPANDED RATIO ANALYSIS (III)							efficiency · growth · per-share · scores
RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
EFFICIENCY							
Asset turnover	0.74	0.77	0.66	0.52	0.45	0.46	
Receivables turnover	9.07	10.08	9.29	6.76	5.67	6.9	
DSO (days)	40	36	39	54	64	53	
DPO (days)	55	64	66	61	52	47	
Cash conversion cycle	105	101	129	198	204	199	
GROWTH (YoY)							
Revenue growth	28.3%	23.5%	-0.9%	-14.2%	-15.3%	—	
Net income growth	331.1%	88.4%	14.8%	-28.0%	-92.3%	—	
EPS growth	317.8%	87.3%	17.0%	-26.3%	-91.8%	—	
FCF growth	221.9%	23.6%	-60.0%	90.0%	39.5%	—	
PER SHARE (\$)							
EPS (diluted, TTM)	2.27	4.25	4.97	3.66	0.30	1.61	
Book value / share	10.30	13.82	17.71	20.48	19.07	18.55	
Revenue / share	15.14	18.59	18.78	16.49	14.90	15.88	
FCF / share	2.90	3.56	1.45	2.82	4.20	4.54	
Cash / share	3.04	6.52	5.65	6.96	6.33	9.90	
SHAREHOLDER RETURN & SCORES							
Buyback yield	0.0%	0.9%	1.5%	2.4%	6.3%	3.97%	
Altman Z-Score	5.39	5.15	6.38	5.30	4.59	4.7	
Piotroski F-Score	8	8	5	6	4	7/9	
Beneish M-Score	-2.74	-2.82	-2.26	-2.33	-3.03	-2.84	

25 EARNINGS QUALITY PANEL				live scores
MODEL	SCORE	ZONE	NOTE	
Piotroski F-Score	7 / 9	Strong		
Altman Z-Score	4.7	Safe (>2.99)	Safe	
Income quality	2.65	Cash-backed	OCF ÷ net income	
Beneish M-Score	-2.84	Non-manipulator	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	0.00
Interest burden		0.95	Earnings stability	0.06
Operating margin		12.1%	Earnings persistence	0.86
Asset turnover		0.47×	Revenue CAGR 3y	-9.5%
Financial leverage		1.76×	EPS CAGR 3y	-29.0%
= ROE		8%	FCF CAGR 3y	15.0%

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SHAREHOLDER RETURN PROFILE live

BUYBACK YIELD 3.97%	DIVIDEND YIELD 0.00% none paid	TOTAL SHAREHOLDER RETURN 3.91% cash yield	SBC / REVENUE 2.4% 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
GFS	\$25.6B	36.2	6%	9.3%	+1.4%	8/9	+35.0%
CRDO	\$31.9B	57.5	31%	27.0%	+165.1%	5/9	+24.3%
Q	\$24.1B	41.2	5%	8.7%	—	4/9	+21.1%
TSEM	\$22.1B	81.7	10%	19.7%	+14.9%	7/9	+161.4%
ENTG	\$21.2B	69.4	8%	10.6%	+3.2%	7/9	—
MTSI	\$20.0B	82.0	17%	29.4%	+28.4%	6/9	—
MCHP	\$40.1B	102.3	7%	15.5%	+20.9%	6/9	—
STM	\$40.5B	87.7	3%	6.4%	+10.3%	6/9	—

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

29 ANALYST CONSENSUS & ESTIMATES live consensus

Buy

47 Analysts



MEAN TARGET (QTR) \$84.91 11 targets	TARGET VS. PRICE +17.9% last-quarter mean	NEXT REPORT 2026-11-02 street \$0.88
---	--	---

CONSENSUS ESTIMATES	REVENUE MEAN	HIGH / LOW	EPS MEAN	HIGH / LOW	# EPS EST.
FY2026	\$6.56B	\$6.68B / \$6.53B	\$3.20	\$3.33 / \$3.00	21
FY2027	\$7.42B	\$7.67B / \$7.28B	\$4.52	\$4.71 / \$4.03	21
FY2028	\$8.44B	\$9.28B / \$8.03B	\$5.87	\$6.81 / \$4.60	10

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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	\$85.00	+18.0%	3
Last Quarter	\$84.91	+17.9%	11
Last Year	\$95.38	+32.4%	26
All Time	\$84.30	+17.1%	113

Rolling mean of published targets vs. last close \$72.02. Aggregated from StreetInsider, Benzinga, Pulse 2.0.

Third-Party Composite Rating

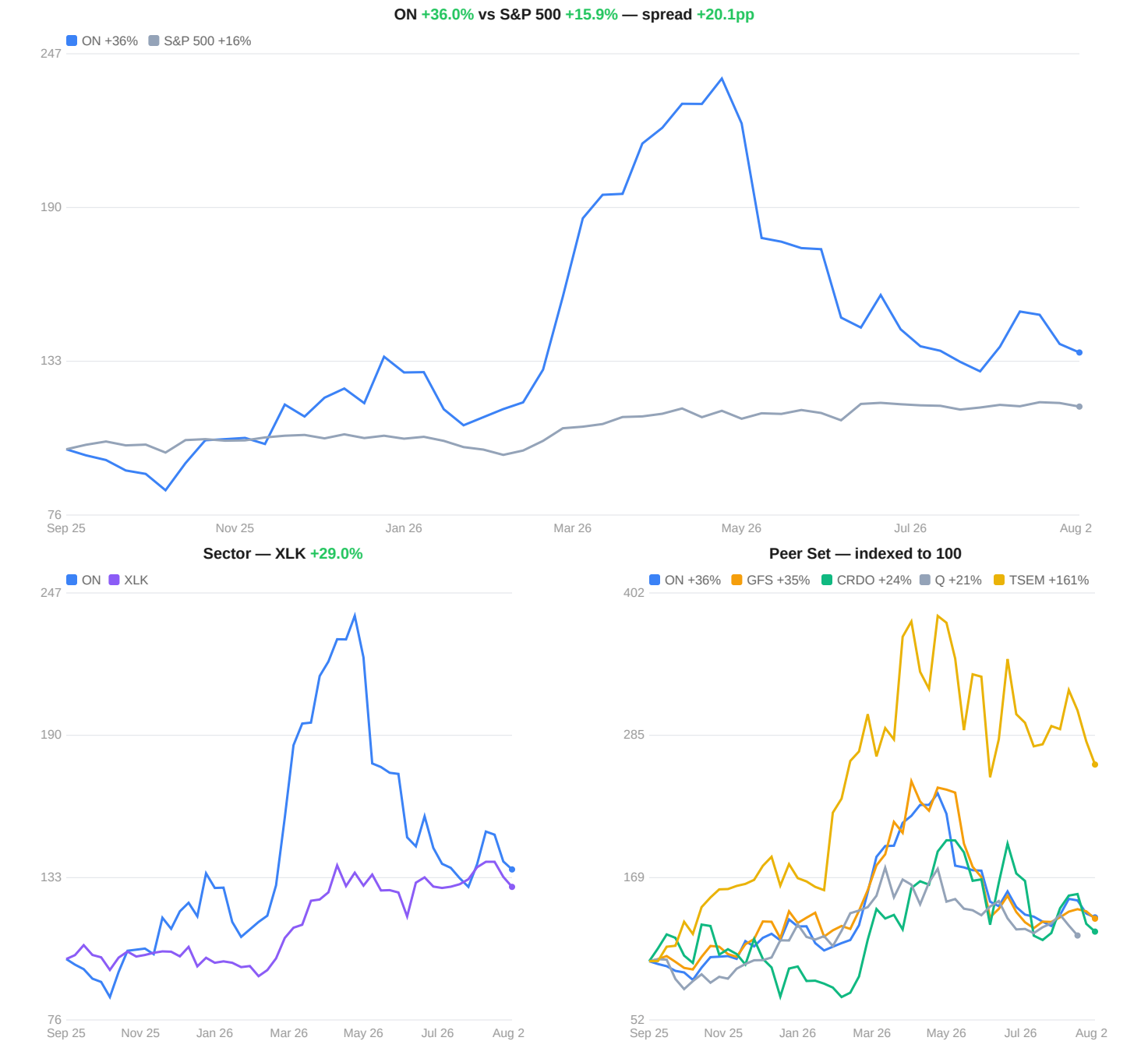
C+

DCF2/5ROE3/5ROA3/5DEBT/EQ2/5P/E1/5P/B2/5

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



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TECHNICAL CHART — 6-MONTH DAILY CANDLES, INDICATORS ON

site chart, print edition



Candlesticks with SMA 20/50 overlay, Bollinger (20,20) 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	\$77.33	-5.31	-6.87%	Below
SMA 50	\$75.90	-3.88	-5.11%	Below
SMA 200	\$81.63	-9.61	-11.77%	Below
EMA 9	\$75.91	-3.89	-5.12%	Below
EMA 21	\$76.55	-4.53	-5.92%	Below
EMA 50	\$78.40	-6.38	-8.14%	Below
EMA 200	\$79.11	-7.09	-8.96%	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 · 21/100 composite

TECHNICAL VERDICT

BEARISH

Power Score -58

2 of 22 indicator votes bullish

Family Scores (site weights)

Trend 30%

Momentum 25%

Volume 20%

Volatility 10%

Patterns 15%

11

0

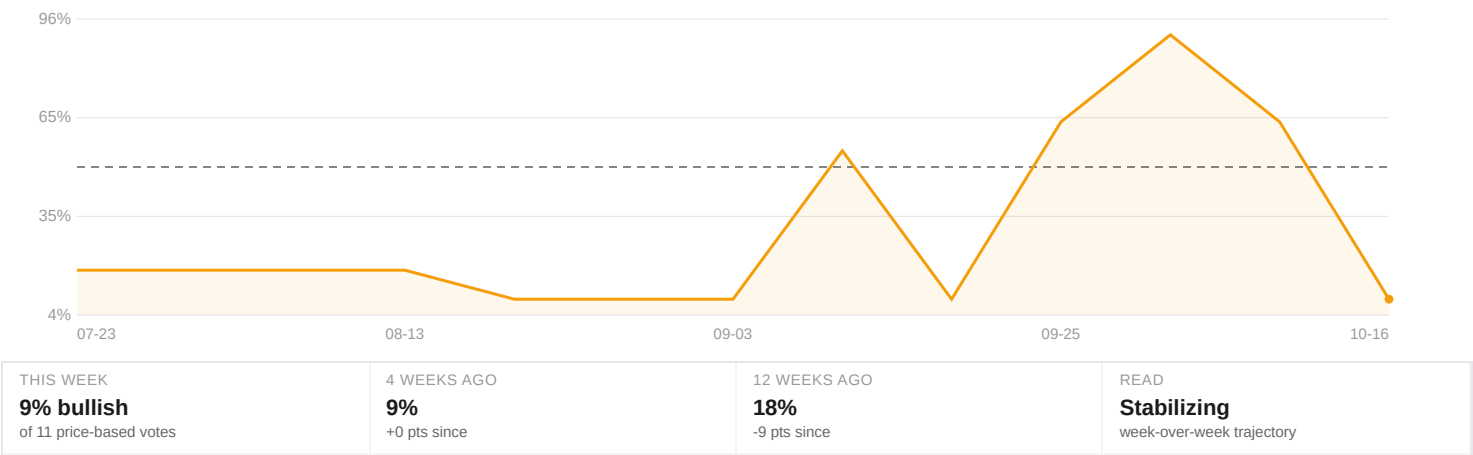
44

33

38

BEARISH — BUT WHICH WAY IS IT TRENDING?

vote share recomputed weekly, 13 weeks



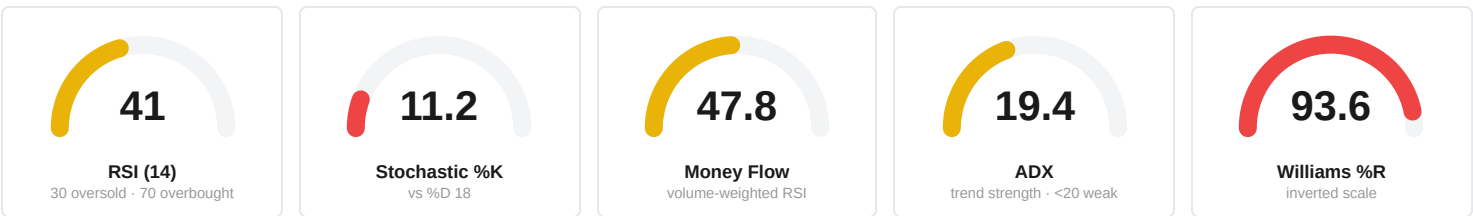
INDICATOR VOTE GRID

2 bull / 20 bear

● Price vs SMA 20	\$77.33	● Price vs SMA 50	\$75.90	● Price vs SMA 200	\$81.63
● EMA 9/21 Cross	75.9/76.5	● SMA 50/200	Death	● ADX Direction	ADX 19
● Supertrend	\$83	● Parabolic SAR	\$85	● SMA Slope	0.100
● RSI	41.0	● Stochastic K/D	11/18	● StochRSI K/D	1/2
● Williams %R	-94	● CCI	-77	● TSI vs Signal	-1.4
● CMO	-17.9	● ROC	-15.16%	● OBV Signal	Distrib
● Chaikin MF	0.200	● MFI	48	● Force Index	-7M
● Elder Ray Bull	-1.48				

INDICATOR GAUGES

site technicals-tab style



33 KEY LEVELS & VOLATILITY

live indicator table

LEVEL	VALUE	LEVEL	VALUE
Pivot / R1 / R2	\$73.02 / \$75.05 / \$76.39	S1 / S2	\$71.68 / \$69.65
Bollinger (20,2)	\$68.52 – \$86.14	Squeeze	Off
52-wk range	\$44.56 – \$134.92	Off 52-wk high	-46.6%
ATR (14)	\$3.50 (4.9%)	Historical vol	48.0%

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34 SEASONALITY — 20-YEAR AVERAGES											live model · win rates shown
+0.8% Jan 60%	+2.6% Feb 55%	-2.6% Mar 43%	+3.0% Apr 35%	+3.6% May 75%	-1.4% Jun 30%	+4.7% Jul 70%	-2.0% Aug 45%	-0.2% Sep 65%	-1.4% Oct 50%	+2.7% Nov 70%	+5.5% Dec 75%

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

35 RISK INDICATORS			computed from live price history
COMPUTED FROM LIVE WEEKLY PRICES			
	ON	S&P 500	
Weekly volatility (σ , 1y)	7.74%	1.83%	
Best / worst week (1y)	+20.9% / -19.2%	—	
Max drawdown (5y, monthly)	-59.4%	—	
1-week VaR (95%)	-12.3%	—	
Beta (5y)	2.00	1.00	

36

EQUITY WEATHER & MARKET REGIME

EDGE · live weather engine

ON EQUITY WEATHER (LIVE)

RAINY · -27

Trend

-36

Momentum

-60

Volume

+47

Volatility

-60

Breadth

-17

MARKET REGIME (2026-10-16)

NEUTRAL

VIX

19.99

Normal

DOW THEORY

Confirmed

Bearish

SPY / QQQ TSI

7.2 / 4.7

trend strength

SECTOR STRENGTH

46/100

breadth average



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38 WEATHER - COMPANY VS INDUSTRY, SECTOR, UNIVERSE

EDGE · live weather engine · Rainy

OVERALL -27.1 +6.6 vs industry	TREND -35.7 -2.5 vs industry	MOMENTUM -60.5 -1.4 vs industry	VOLUME +47.2 +72.8 vs industry
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READING	ON	SEMICONDUCTORS N=871	TECHNOLOGY N=6,969	ALL US SYMBOLS N=70,435
Overall	-27.1	-33.7	-20.7	-20.5
Trend	-35.7	-33.2	-20.8	-21.3
Momentum	-60.5	-59.0	-28.5	-15.8
Volume	+47.2	-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

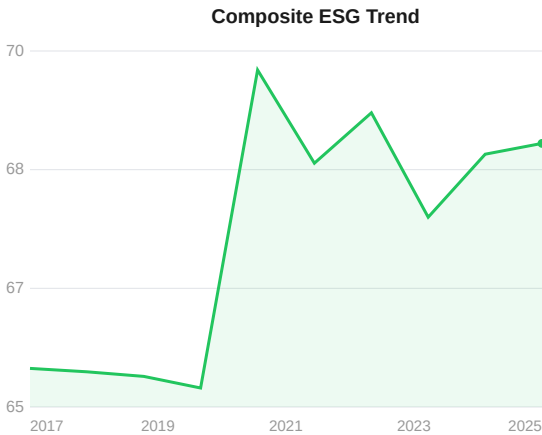
live proxy data · FY2025

EXECUTIVE	TOTAL COMP	STRUCTURE
Hassane El-Khoury President and Chief Execut	\$17.7M	93% equity+incentive
Thad Trent Executive Vice President and Chie	\$7.1M	90% equity+incentive
Sudhir Gopalswamy Group President, AMG and I	\$5.4M	88% equity+incentive
Simon Keeton Group President, PSG	\$5.3M	88% equity+incentive

40 ESG ASSESSMENT

live disclosure-derived scores

PILLAR (LIVE DISCLOSURE SCORES)	SCORE
Environmental	69
Social	61
Governance	76
Composite ESG	69



41 8-K MATERIAL EVENTS

live EDGAR feed

FILED	8-K CONTENTS	ITEMS
2026-10-01	Material Agreement; Other Events; Exhibits	1.01,8.01,9.01
2026-08-13	Other Events	8.01
2026-08-03	Earnings Release; Exhibits	2.02,9.01
2026-06-25	Material Agreement; Other Events; Exhibits	1.01,8.01,9.01
2026-05-18	Officer/Director Change; Shareholder Vote	5.02,5.07
2026-05-12	Material Agreement; Financial Obligation; Unregistered Equity Sales; O	1.01,2.03,3.02,8.01,9.01
2026-05-07	Other Events; Exhibits	8.01,9.01
2026-05-06	Other Events; Exhibits	8.01,9.01

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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 · 2020-10-31 to 2026-08-03
Analyst estimates	dim/forward_estimates	3 rows · 2026-12-31 to 2028-12-31
Institutional ownership (13F)	holdings_db.institutional_ownership_summary	105 rows · 2000 to 2026
Insider transactions (Form 4)	edgar/form4	12 rows · 2026-04-23 to 2026-10-02
Proposed sales (Form 144)	edgar/form144	1 record
Beneficial ownership (13D/G)	edgar/13dg	4 rows · 2026-01-30 to 2026-10-07
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.