

O'Reilly Automotive, Inc. (ORLY)

Consumer Cyclical / Specialty Retail · NASDAQ Global Select

InsiderStreet
EQUITY FACTSHEET

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
\$89.27	\$72.2B	\$102.46	28.2	51.6%	-232%	7/9	-11.8%
2026-10-16	VOLUME	52-WK LOW	P/S	NET MARGIN	ROIC	ALTMAN Z	5-YR RETURN
	5.9M	\$82.59	3.89	14.3%	34%	3.6	+249.4%

O'Reilly Automotive, Inc., along with its subsidiary companies, functions as a leading retail and wholesale provider of automotive aftermarket products, specialized tools, supplies, and accessories across the United States. The company's comprehensive inventory includes both new and reconditioned vehicle hard parts and essential maintenance items. This expansive selection covers critical components such as alternators, batteries, brake system parts, belts, chassis and driveline components, engine parts, fuel pumps, hoses, starters, temperature control systems, and water pumps. Additionally, they supply consumables like antifreeze, appearance products, engine additives, filters, various fluids, lighting solutions, oil, and wiper blades. Their accessory range features items like floor mats, seat covers, and specific truck enhancements. Beyond just parts, O'Reilly's outlets also stock auto body paint and related materials, a wide array of automotive tools, and specialized equipment catering to professional service providers. Customers can also benefit from a suite of value-added services and programs offered in-store. These include recycling initiatives for used oil, oil filters, and batteries; complimentary installation services for batteries, wiper blades, and light bulbs; comprehensive diagnostic testing for batteries, electrical systems, and vehicle modules; retrieval of check engine light codes; a convenient loaner tool program; resurfacing services for brake drums and rotors; custom hydraulic hose fabrication; and professional-grade paint shop mixing with associated materials. O'Reilly's stores serve a diverse clientele, providing an extensive product assortment for both individual do-it-yourself (DIY) mechanics and professional auto repair facilities, covering domestic and imported automobiles, vans, and trucks. As of December 31, 2021, the company maintained a significant retail presence, operating 5,759 stores throughout the United States and an additional 25 locations in Mexico. Established in 1957, O'Reilly Automotive, Inc. is headquartered in Springfield, Missouri.

SECTOR Consumer Cyclical INDUSTRY Specialty Retail EXCHANGE NASDAQ MARKET CAP \$72.2B EMPLOYEES 78,258 (SEC-filed) CEO Brad W. Beckham

IPO 1993-04-23 COUNTRY US

233 South Patterson Avenue, Springfield, MO 65802-2298 · Tel 417 862 6708 · oreillyauto.com

1 INSIDERSTREET SCORE

INSIDERSTREET SCORE

63 / 100

Street mean **\$105.00** (7 analysts, last qtr) — their number, not ours

INSIDER CONSENSUS SIGNAL

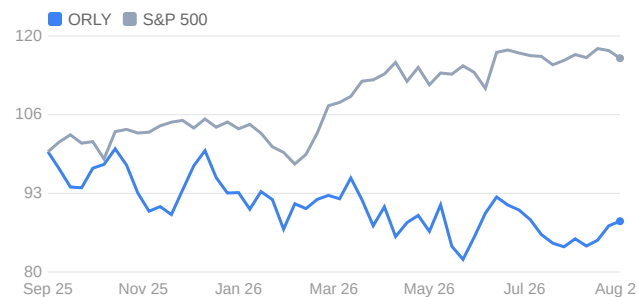
ROUTINE SELLING — LOW SIGNAL

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

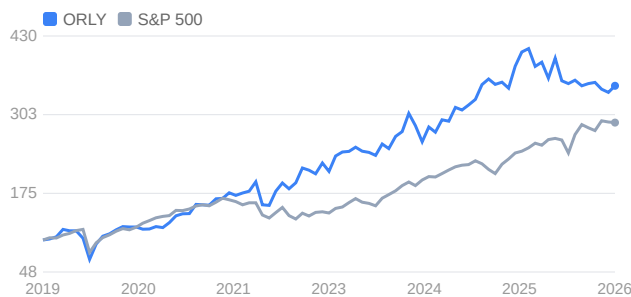
2 PRICE AND VOLUME

adjusted close, prod data layer

1 Year vs S&P 500 · ORLY -11.8% · S&P 500 +15.9% · spread -27.6pp



7 Years vs S&P 500 · ORLY +249.4% · S&P 500 +189.9% · spread +59.5pp



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

63

OF 100

Score Breakdown

Profitability	55/100
Growth	63/100
Momentum	80/100
Quality	72/100
Earnings Quality	90/100
Balance Sheet	40/100
Value	35/100
Risk (safety)	90/100
Overall	62.9/100

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
SE	66
MELI	61
EBAY	71
AZO	51
WSM	70
CPNG	22
ORLY	63

IS Score Trend — quarterly



4 TWO READINGS

business vs price

BUSINESS QUALITY

63 / 100

IS Score 62.9 / 100 · -1.7 from peak of 65

Quarter	Business Quality
23 Q1	63
23 Q2	65
23 Q3	64
23 Q4	62
24 Q1	61
24 Q2	60
24 Q3	59
24 Q4	58
25 Q1	57
25 Q2	56
25 Q3	57
25 Q4	60
26 Q1	63

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

PRICE STRUCTURE

BULLISH

Technical Score 81 / 100 · Power +62 · 19 of 22 indicator votes bullish

Quarter	Price Structure
23 Q1	81
23 Q2	96
23 Q3	94
23 Q4	81
24 Q1	70
24 Q2	60
24 Q3	50
24 Q4	50
25 Q1	50
25 Q2	50
25 Q3	50
25 Q4	50
26 Q1	81

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 63 and price structure at 81 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.

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5WHAT 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 62.9	would move us up one band
IS Score stops falling - one quarter higher than the prior	last four: 55 → 55 → 60 → 63	the direction matters more than the level
Technical vote share back above 50%	now 82%	price structure no longer broken
Institutional holder count rises two quarters running	peak 1,714 → now 1,656	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.

6SMART MONEY CONFLUENCE

EDGE · disclosure sources

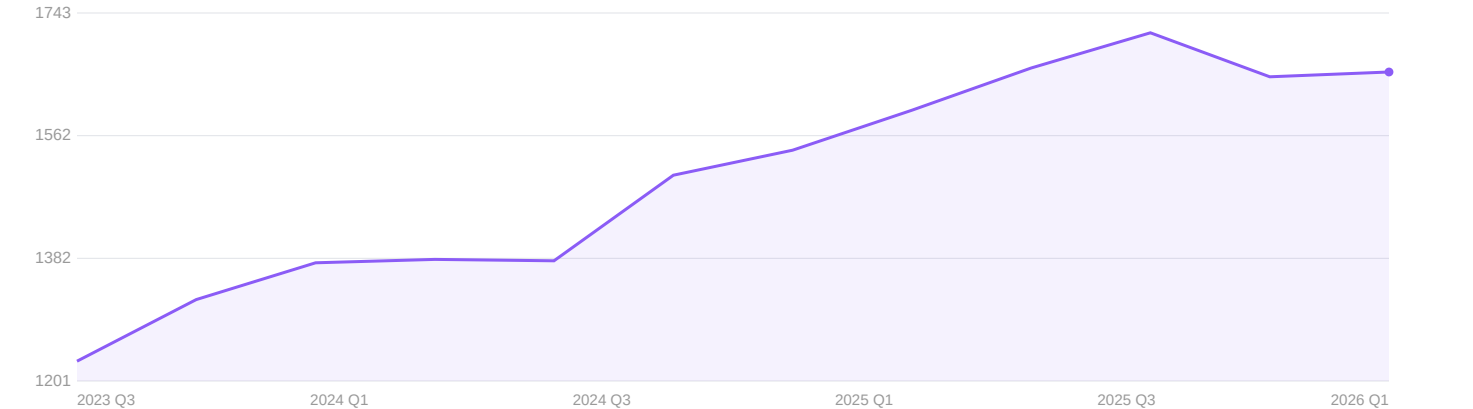
SITE CONVERGENCE SCORE 2 of 4 top 13% of 29,420 symbols	SOURCES ALIGNED — of 3 independent disclosures	CONGRESS (180D) 0 buys none disclosed	INSIDER BUYS (180D) 0 none disclosed
ETF FUNDS (30D) 1306 up / 1105 down net +201 funds	INSTITUTIONS ADDED (13F) 7 managers opening or increasing		

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.

7INSTITUTIONAL OWNERSHIP - 12-QUARTER TREND

13F · filed 45 days after quarter end

Institutions holding — 12 quarters



Peak 1,714 · latest 1,656 (-58 from peak).

QUARTER	HOLDERS	13F SHARES	VALUE	REPORTED OWN%
2026 Q2	1,656	717.4M	\$64.6B	86.9%
2026 Q1	1,649	698.0M	\$63.3B	84.6%
2025 Q4	1,714	716.7M	\$64.0B	86.8%
2025 Q3	1,662	702.4M	\$74.2B	85.1%
2025 Q2	1,600	721.1M	\$63.5B	87.4%
2025 Q1	1,541	725.2M	\$67.4B	87.9%
2024 Q4	1,504	729.4M	\$55.9B	88.3%
2024 Q3	1,378	747.1M	\$54.7B	90.6%
2024 Q2	1,380	748.0M	\$50.8B	90.6%
2024 Q1	1,375	749.8M	\$54.6B	90.9%
2023 Q4	1,321	752.0M	\$45.8B	91.1%
2023 Q3	1,230	750.7M	\$44.2B	90.9%

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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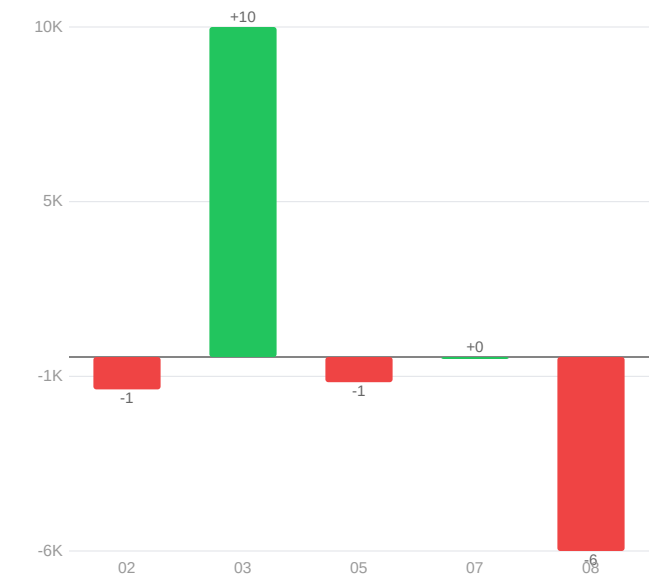
8 INSIDER ACTIVITY live Form 4 data

INSIDER	ROLE	DATE	TYPE	SHARES	VALUE	POST-TXN OWNED
Hendrickson Thomas	director	2026-08-28	SELL	1,000	\$0.09M	18,675
Sastre Maria	director	2026-08-12	SELL	2,000	\$0.18M	14,970
Mancini Christopher Andrew	SVP OF PROF SALES & STORE OPS	2026-08-12	SELL	3,000	\$0.28M	189
Yankee Colin	EVP & CSCO	2026-07-15	—	14,279	\$1.25M	0
Hendrickson Thomas	director	2026-05-29	SELL	1,200	\$0.11M	19,675
Dumas Robert Allen	SVP OF EASTERN STORE OPS/SALES	2026-05-20	SELL	84,600	\$7.83M	1,782
Murphy John Raymond	director	2026-05-18	SELL	2,595	\$0.23M	4,000
Johnson Gregory D	director	2026-05-15	A-Award	2,035	\$0.18M	79,248

9 SELL DECOMPOSITION — ROUTINE VS. DISCRETIONARY EDGE

6-MO DECOMPOSITION (FORM 4)	TXNS	SHARES	VALUE	SIGNAL WEIGHT
S — Open-market sales	9	112,730	\$10.5M	Counted
M — Exercises (paired A/D)	4	34,670	\$0.6M	None — mechanics
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 \$10.5M 9 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
2026-08-28	Thomas T Hendrickson	1,000	\$0.1M
2026-08-12	Mancini Christopher Andrew	3,000	\$0.3M
2026-08-12	Sastre Maria	2,000	\$0.2M
2026-05-29	Hendrickson Thomas	1,200	\$0.1M
Trailing 12 mo	13 filings	125,505	\$12M

11 13D / 13G STAKES COND

FILED	FORM	REPORTING PERSON	% OF CLASS	SHARES
2026-04-30	SCHEDULE 13G	Vanguard Capital Management	7.54%	63.1M sh
2026-03-27	SCHEDULE 13G/A	The Vanguard Group	—	exit/reporting change

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12 CONGRESSIONAL TRADING					EDGE · STOCK Act
MEMBER	CHAMBER	TRADE	SIZE BAND	TRADED	DISCLOSED
Ro Khanna	House	SELL	\$1,001 - \$15,000	2026-09-25	2026-10-09
Ro Khanna	House	SELL	\$1,001 - \$15,000	2026-09-04	2026-10-09
Kevin Hern	House	SELL	\$15,001 - \$50,000	2026-09-02	2026-09-28
Kelly Loeffler	Senate	SELL	\$15,001 - \$50,000	2020-02-11	2020-03-12
Kelly Loeffler	Senate	SELL	\$15,001 - \$50,000	2020-02-11	2020-03-11
Kelly Loeffler	Senate	SELL	\$15,001 - \$50,000	2020-02-07	2020-05-01
HOUSE 12-MO 19 trades 3 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) 1,649	13F SHARES 698M 84.6% of shares out	NEW / CLOSED 124 / 154 positions, QoQ	INCREASED / REDUCED 608 / 665 positions, QoQ
PUT/CALL (13F) 1.19 option positions	FREE FLOAT 99.5% 805M sh		

2.8 · Largest Reporting 13F Managers

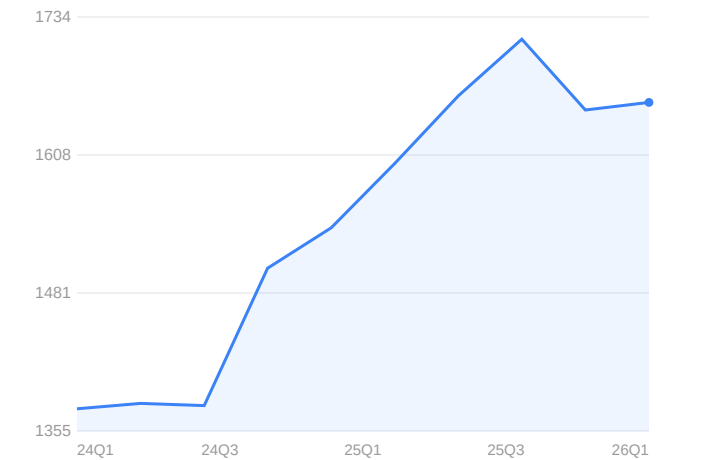
MANAGER	SHARES	VALUE
Assenagon Asset Management S.A.	7.3M	\$619M
Farther Finance Advisors, Llc	789,995	\$67M
Davenport & Co Llc	781,264	\$67M
Banque Pictet & Cie Sa	601,634	\$51M
Woodstock Corp	552,222	\$47M
Asr Vermogensbeheer N.V.	492,991	\$42M

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

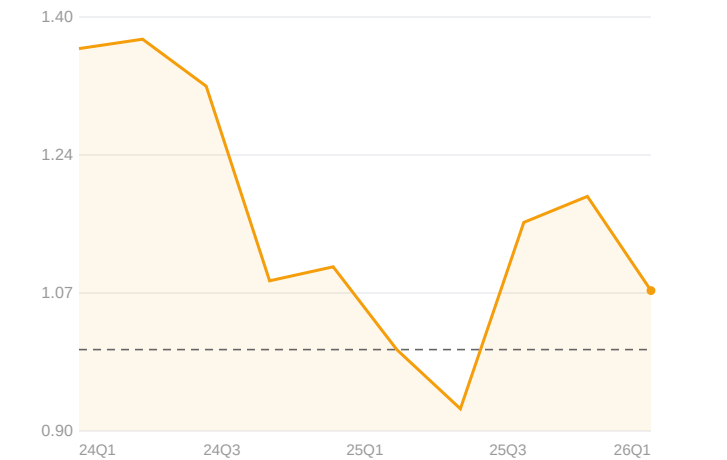
2.9 · Top ETF & Fund Ownership

FUND	WEIGHT	POSITION
VITSX	0.1%	\$2.2B
VSMPX	0.1%	\$2.2B
VTSAX	0.1%	\$2.2B
VTI	0.1%	\$2.2B
VOO	0.1%	\$1.8B
VFFSX	0.1%	\$1.8B

13F Filers Holding ORLY — quarterly



Institutional Put/Call — quarterly

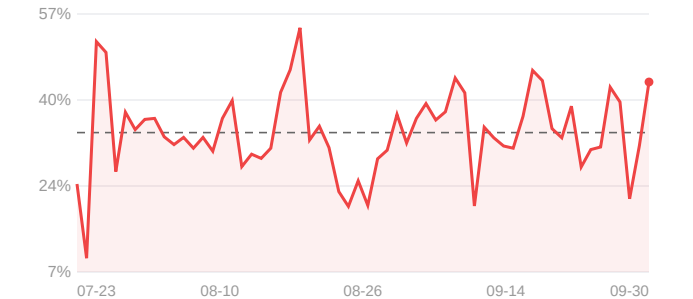


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14 SHORT VOLUME — DAILY, 60 SESSIONS

EDGE · live FINRA feed

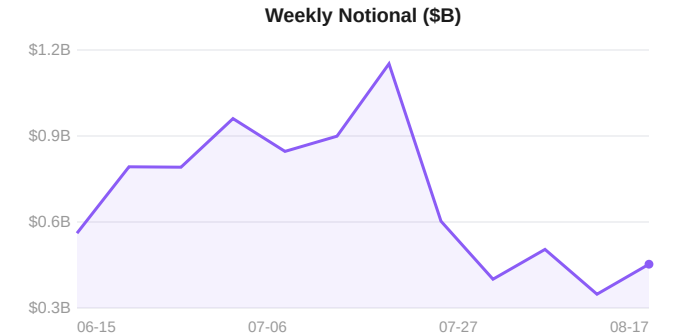


Daily short-sale volume as % of volume reported in FINRA's short-sale file — a flow measure, not short interest; dashed = 50-day average.

LATEST SESSION 43.8% 2026-10-15	20-DAY AVG 34.7% 50-day 33.9%	TREND Rising 20d vs 50d	BY MARKET CENTER Q: 43% · N: 55% · B: 47% latest session
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15 DARK POOL ACTIVITY

EDGE · live ATS data

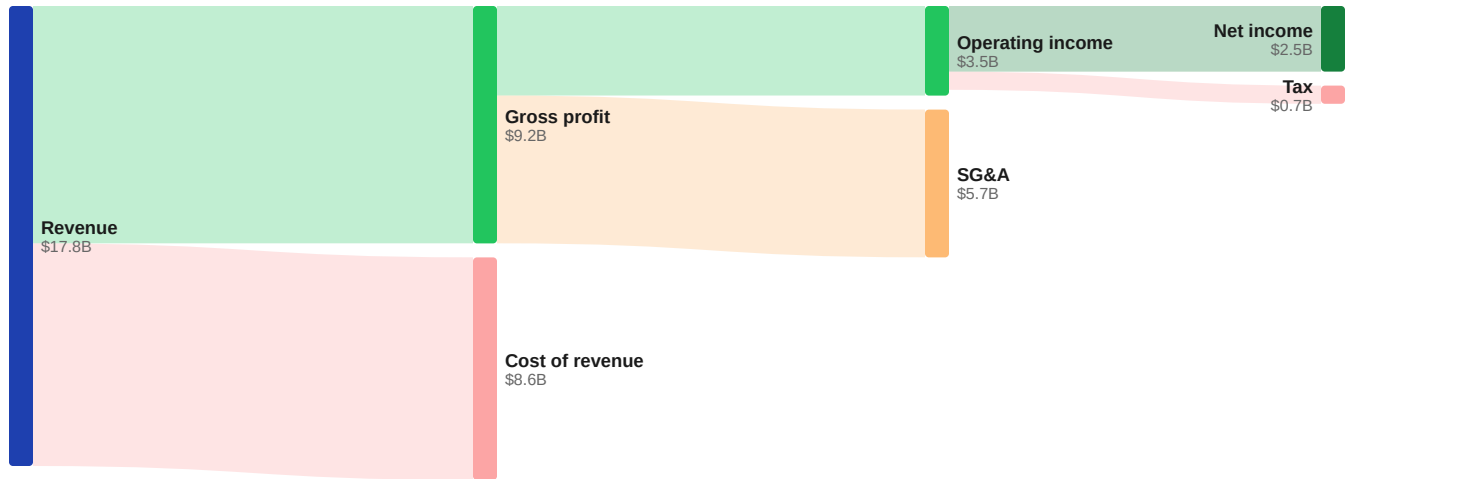


Where ORLY Trades in the Dark

ATS VENUE (4-WK)	SHARES	AVG TRADE
Incr Intelligent Cross Llc	5.3M	51 sh
Ubsa Ubs Ats	4.8M	50 sh
Mstx Ms Trajectory Cross (Ats-1)	3.7M	71 sh
Sgmt Sigma X2	3.1M	57 sh
Ebxl Level Ats	2.9M	31 sh
Mlix Instinct X	2.2M	82 sh

16 REVENUE FLOW — FY2025

live income data



Where a dollar of O'Reilly Automotive, Inc. revenue goes. All values FY2025 filings, live. Product segmentation not yet parsed for this symbol — revenue shown unsegmented.

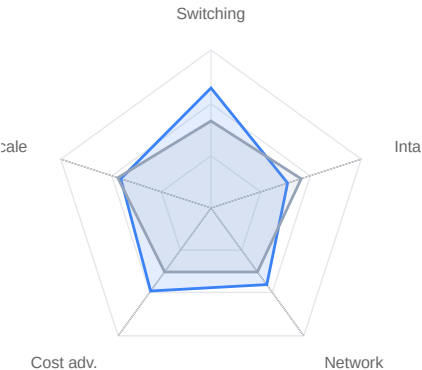
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17 MOAT & COMPETITIVE POSITION

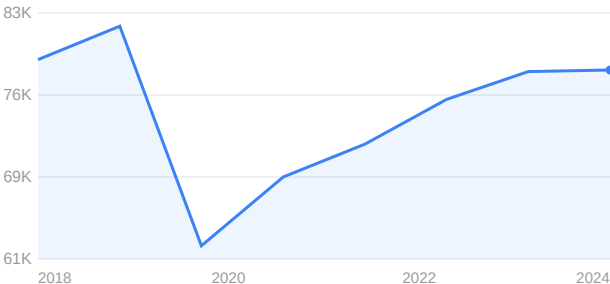
LIVE MODEL · 63/100 NARROW

Moat score 63/100 — Narrow; primary source Switching Costs.



ORLY (live moat model) Peer median: SE · MELI · EBAY · AZO · WSM
Component scores from the live moat model. Peer median illustrative.

3.8 · Employees (SEC filings)



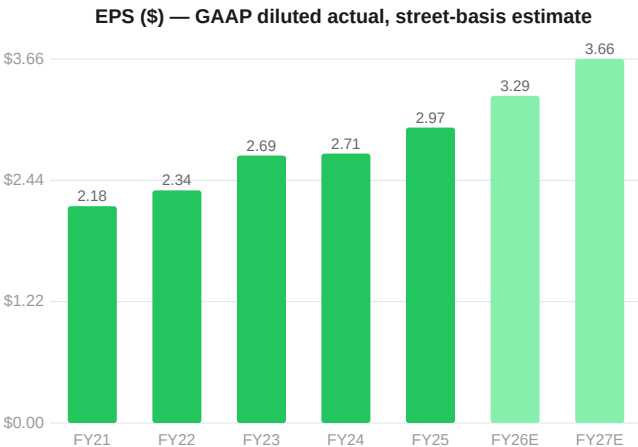
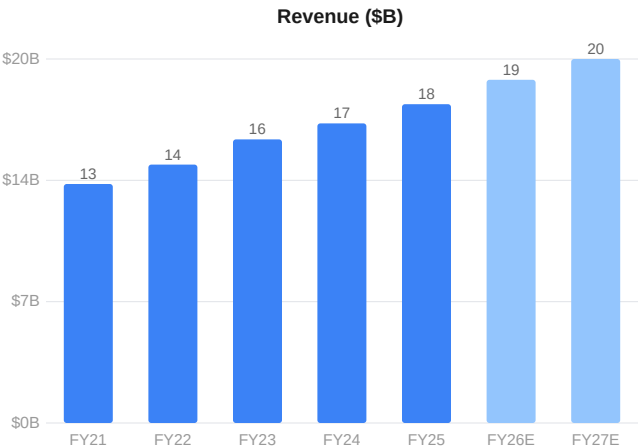
18 CORPORATE INFORMATION — KEY OFFICERS

78,258 employees

OFFICER	TITLE
Brad W. Beckham	Chief Executive Officer
Brent G. Kirby	President
Jeremy Adam Fletcher	Executive Vice President & Chief Financial Officer
Scott Richard Ross	Executive Vice President & Chief Information Officer

19 REVENUE & EPS — HISTORY AND ESTIMATES

live consensus

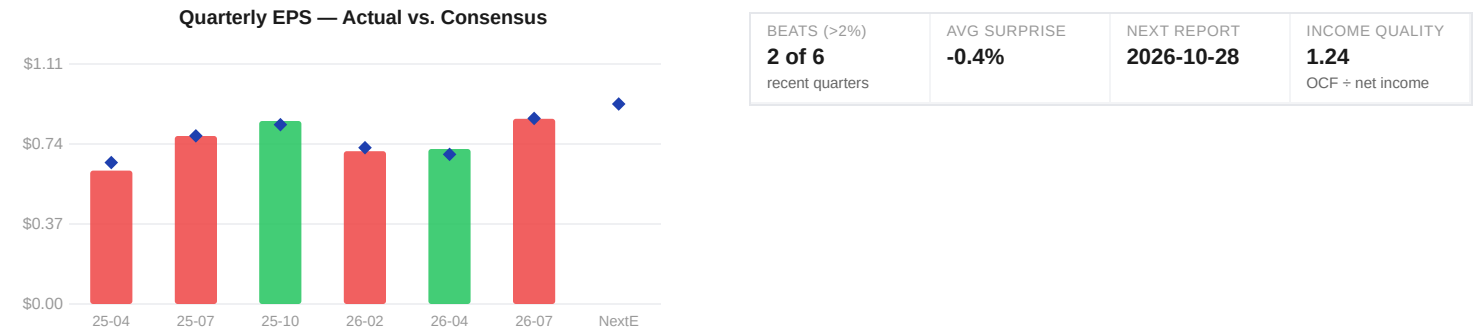


Actual bars are GAAP diluted EPS from the filed income statement; the lighter forward bars are street-basis consensus. The two are different measures and are not comparable quarter to quarter.

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20 ESTIMATE VS. ACTUAL & SURPRISES

live data



21 REPORTED VS. CONSENSUS — FULL HISTORY

0 quarters · live data

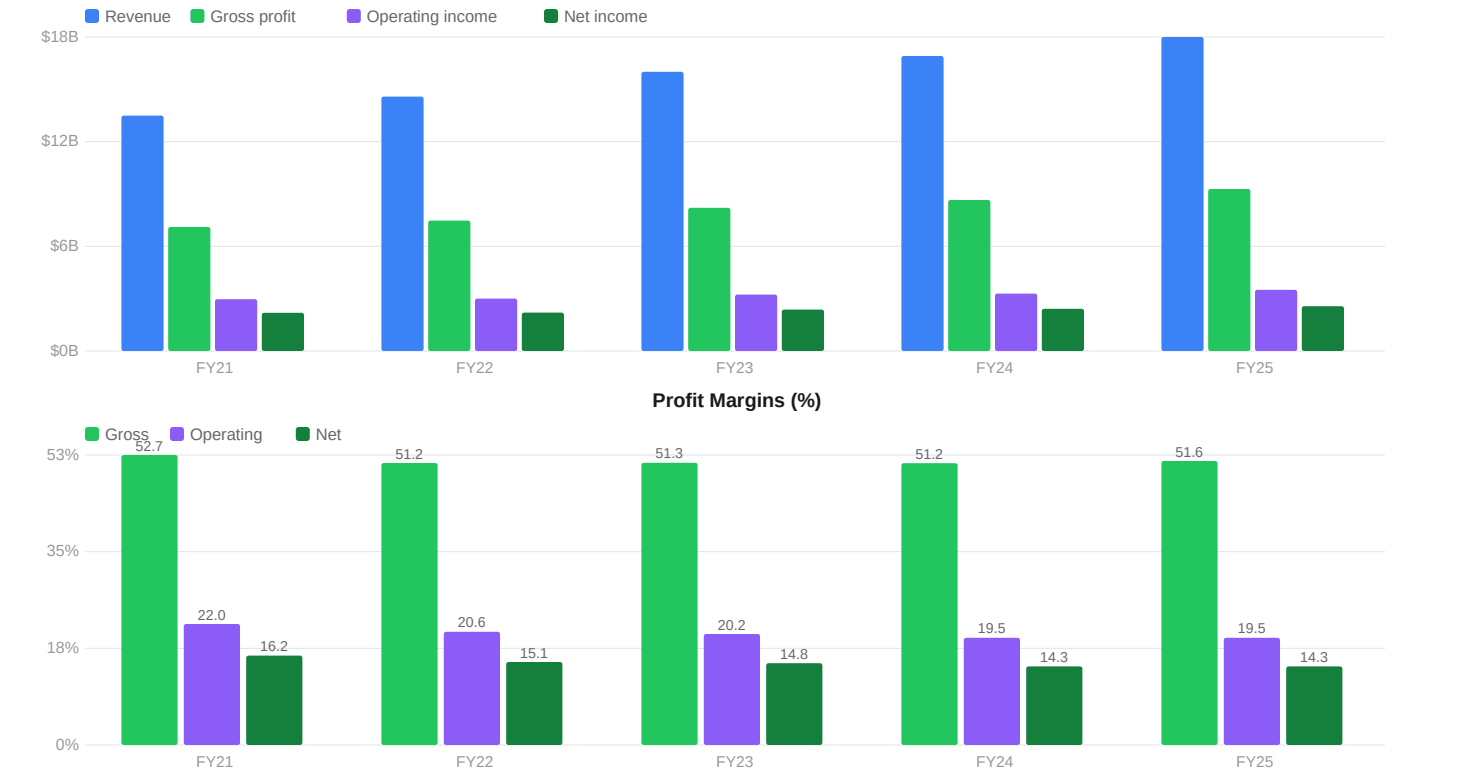
BEAT RATE —% 0 of 0 quarters	CURRENT STREAK 0 longest 0	AVG EPS SURPRISE —% median —%	SURPRISE TREND — last 4 vs prior 4
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PERIOD	EPS EST.	EPS ACTUAL	EPS SURPRISE	REV EST. (\$M)	REV ACTUAL (\$M)	REV SURPRISE
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Announcement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

INCOME TRENDS — 5 YEAR

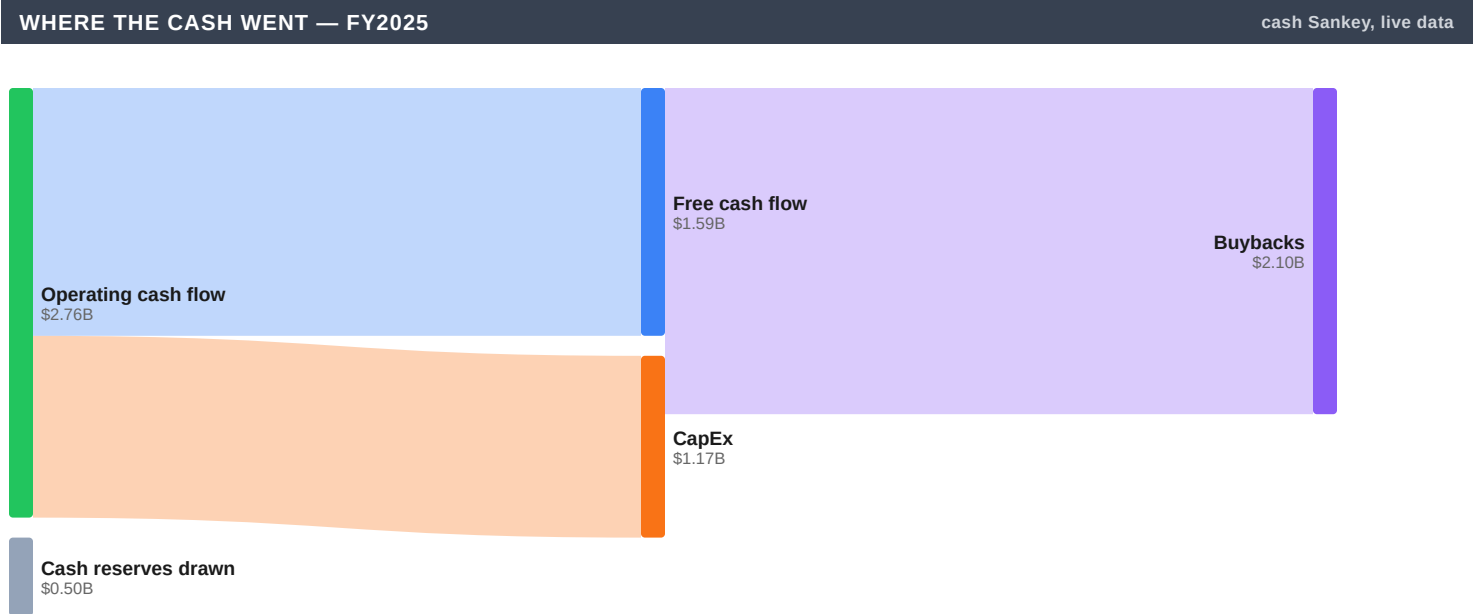
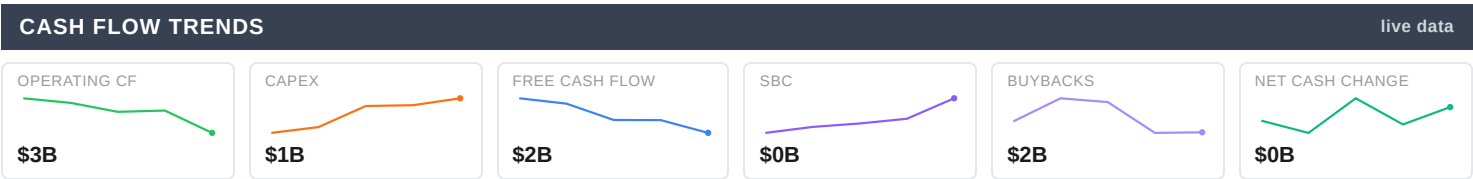
live financials



YOY GROWTH	FY21	FY22	FY23	FY24	FY25
Revenue	+14.8%	+8.1%	+9.7%	+5.7%	+6.4%
Gross profit	+15.4%	+5.2%	+9.8%	+5.5%	+7.2%
Operating income	+20.9%	+1.1%	+7.6%	+2.0%	+6.4%
Net income	+23.5%	+0.4%	+8.0%	+1.7%	+6.3%

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22 INCOME STATEMENT — FULL						live financials
\$B · FY ENDS	FY21	FY22	FY23	FY24	FY25	TREND
Revenue	13.3	14.4	15.8	16.7	17.8	
Cost of revenue	6.3	7.0	7.7	8.2	8.6	
Gross profit	7.0	7.4	8.1	8.6	9.2	
R&D expense	0.0	0.0	0.0	0.0	0.0	
SG&A expense	4.1	4.4	4.9	5.3	5.7	
Operating income	2.9	3.0	3.2	3.3	3.5	
EBITDA	3.3	3.3	3.6	3.7	4.0	
D&A	0.3	0.4	0.4	0.5	0.5	
Pretax income	2.8	2.8	3.0	3.0	3.2	
Income tax	0.6	0.6	0.7	0.7	0.7	
Net income	2.2	2.2	2.3	2.4	2.5	
Diluted EPS (\$)	2.18	2.34	2.69	2.71	2.97	
Diluted shares (M)	994	928	871	839	856	



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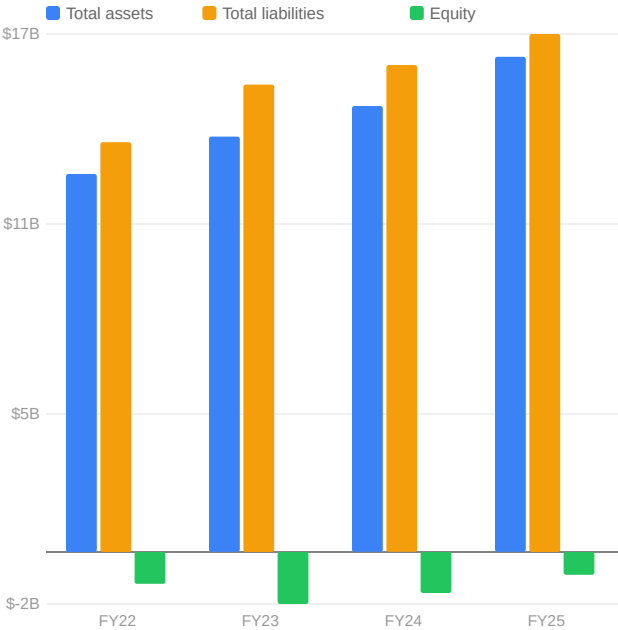
Balance Sheet — Full

\$B	FY22	FY23	FY24	FY25	
Cash & equivalents	0.1	0.3	0.1	0.2	
ST investments	0.0	0.0	0.0	0.0	
Receivables (net)	0.5	0.5	0.5	0.5	
Total current assets	5.0	5.6	5.8	6.7	
PP&E (net)	6.5	7.2	7.9	8.6	
Goodwill + intangibles	0.9	0.9	1.0	1.0	
Total assets	12.6	13.9	14.9	16.5	
Accounts payable	5.9	6.1	6.5	7.1	
Short-term debt	0.0	0.0	0.0	0.0	
Deferred revenue	0.0	0.0	0.0	0.0	
Total current liabilities	7.1	7.7	8.3	8.8	
Long-term debt	4.4	5.6	5.5	6.0	
Total liabilities	13.7	15.6	16.3	17.3	
Shareholders' equity	-1.1	-1.7	-1.4	-0.8	

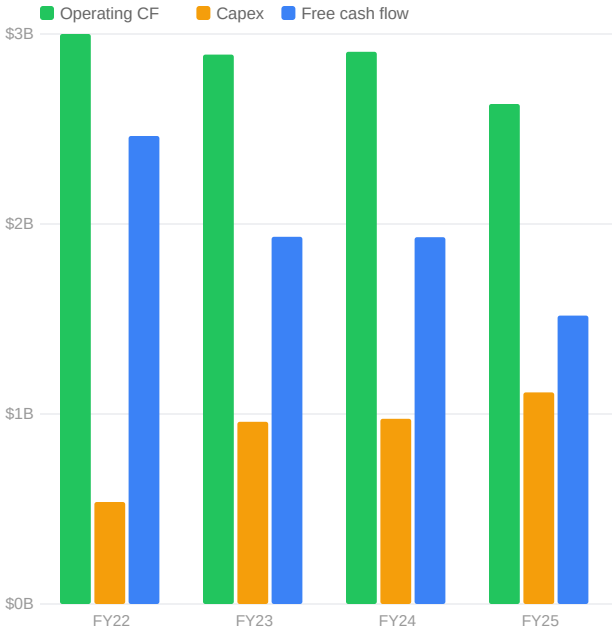
Cash Flow Statement — Full

\$B	FY22	FY23	FY24	FY25	
Net income	2.2	2.3	2.4	2.5	
D&A	0.4	0.4	0.5	0.5	
Stock-based compensation	0.0	0.0	0.0	0.0	
Working capital change	0.5	0.2	0.2	(0.3)	
Operating cash flow	3.1	3.0	3.0	2.8	
Capital expenditures	(0.6)	(1.0)	(1.0)	(1.2)	
Investing cash flow	(0.7)	(1.0)	(1.2)	(1.2)	
Buybacks	(3.3)	(3.2)	(2.1)	(2.1)	
Dividends paid	0.0	0.0	0.0	0.0	
Debt issuance / (repay)	0.5	1.2	(0.1)	0.5	
Financing cash flow	(2.7)	(1.9)	(2.0)	(1.5)	
Free cash flow	2.6	2.0	2.0	1.6	

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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23 EXPANDED RATIO ANALYSIS (I)							live ratio engine · profitability · valuation
RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
PROFITABILITY							
ROE	5863.6%	-385.5%	-167.6%	-153.5%	-237.8%	-232%	
ROA	18.6%	17.8%	17.7%	16.6%	16.2%	15.2%	
ROIC	41.7%	42.7%	42.7%	39.7%	36.0%	34.3%	
Gross margin	52.7%	51.2%	51.3%	51.2%	51.6%	51.6%	
Operating margin	22.0%	20.6%	20.2%	19.5%	19.5%	19.6%	
Net margin	16.2%	15.1%	14.8%	14.3%	14.3%	14.3%	
EBITDA margin	24.4%	23.0%	22.9%	22.3%	22.4%	22.5%	
FCF margin	20.7%	17.9%	12.8%	12.1%	9.0%	—	
VALUATION							
P/E	21.11	23.37	23.01	27.78	30.49	28.2	
P/B	-687.81	-47.86	-31.04	-48.36	-101.37	-40.1	
P/S	3.43	3.52	3.41	3.97	4.35	3.89	
P/FCF	16.53	19.64	26.63	32.72	48.57	33.5	
EV/EBITDA	15.73	17.26	17.03	19.86	21.49	19.5	
EV/Revenue	3.84	3.97	3.89	4.43	4.82	4.4	
Earnings yield	4.7%	4.3%	4.3%	3.6%	3.3%	3.60%	
FCF yield	6.1%	5.1%	3.8%	3.1%	2.1%	2.99%	
EXPANDED RATIO ANALYSIS (II)							leverage · solvency
RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
LEVERAGE & SOLVENCY							
Current ratio	0.77	0.71	0.73	0.71	0.77	0.75	
Quick ratio	0.14	0.10	0.12	0.09	0.12	0.13	
Debt / equity	-88.32	-6.17	-4.51	-5.78	-11.12	-5.22	
Debt / assets	50.1%	51.8%	56.5%	53.2%	51.3%	55.1%	
Net debt / EBITDA	1.69	1.94	2.09	2.09	2.08	2.23	
Interest coverage	20.22	18.74	15.90	14.68	14.78	—	

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EXPANDED RATIO ANALYSIS (III)							efficiency · growth · per-share · scores
RATIO	FY21	FY22	FY23	FY24	FY25	TTM	TREND
EFFICIENCY							
Asset turnover	1.14	1.18	1.19	1.16	1.13	1.07	
Receivables turnover	53.07	46.81	44.03	45.66	47.63	40.6	
DSO (days)	7	8	8	8	8	9	
DPO (days)	257	275	283	282	289	300	
Cash conversion cycle	-38	-58	-62	-56	-52	-48	
GROWTH (YoY)							
Revenue growth	14.8%	8.1%	9.7%	5.7%	6.4%	—	
Net income growth	23.5%	0.4%	8.0%	1.7%	6.3%	—	
EPS growth	32.3%	7.9%	14.3%	3.4%	5.1%	—	
FCF growth	16.6%	-6.5%	-21.6%	-0.1%	-21.4%	—	
PER SHARE (\$)							
EPS (diluted, TTM)	2.23	2.41	2.75	2.85	2.99	3.21	
Book value / share	-0.07	-1.18	-2.04	-1.63	-0.90	-2.22	
Revenue / share	13.73	15.97	18.55	19.92	20.96	22.51	
FCF / share	2.85	2.86	2.38	2.42	1.88	2.61	
Cash / share	0.37	0.12	0.33	0.16	0.23	0.32	
SHAREHOLDER RETURN & SCORES							
Buyback yield	5.4%	6.5%	5.8%	3.1%	2.7%	4.39%	
Altman Z-Score	3.98	3.68	3.48	3.83	4.11	3.6	
Piotroski F-Score	8	5	8	6	8	7/9	
Beneish M-Score	-2.74	-2.63	-2.63	-2.71	-2.45	-2.00	

24 EARNINGS QUALITY PANEL				live scores
MODEL	SCORE	ZONE	NOTE	
Piotroski F-Score	7 / 9	Strong		
Altman Z-Score	3.6	Safe (>2.99)	Safe	
Income quality	1.24	Cash-backed	OCF ÷ net income	
Beneish M-Score	-2.00	Elevated	vs -2.22 threshold	

25 DUPONT & GROWTH QUALITY				live analysis engine
DUPONT DECOMPOSITION (TTM)		VALUE	GROWTH QUALITY (LIVE)	VALUE
Tax burden		0.78	Revenue stability	0.99
Interest burden		0.93	Earnings stability	0.98
Operating margin		19.6%	Earnings persistence	0.96
Asset turnover		1.12×	Revenue CAGR 3y	6.9%
Financial leverage		-10.83×	EPS CAGR 3y	7.5%
= ROE		-173%	FCF CAGR 3y	-6.2%

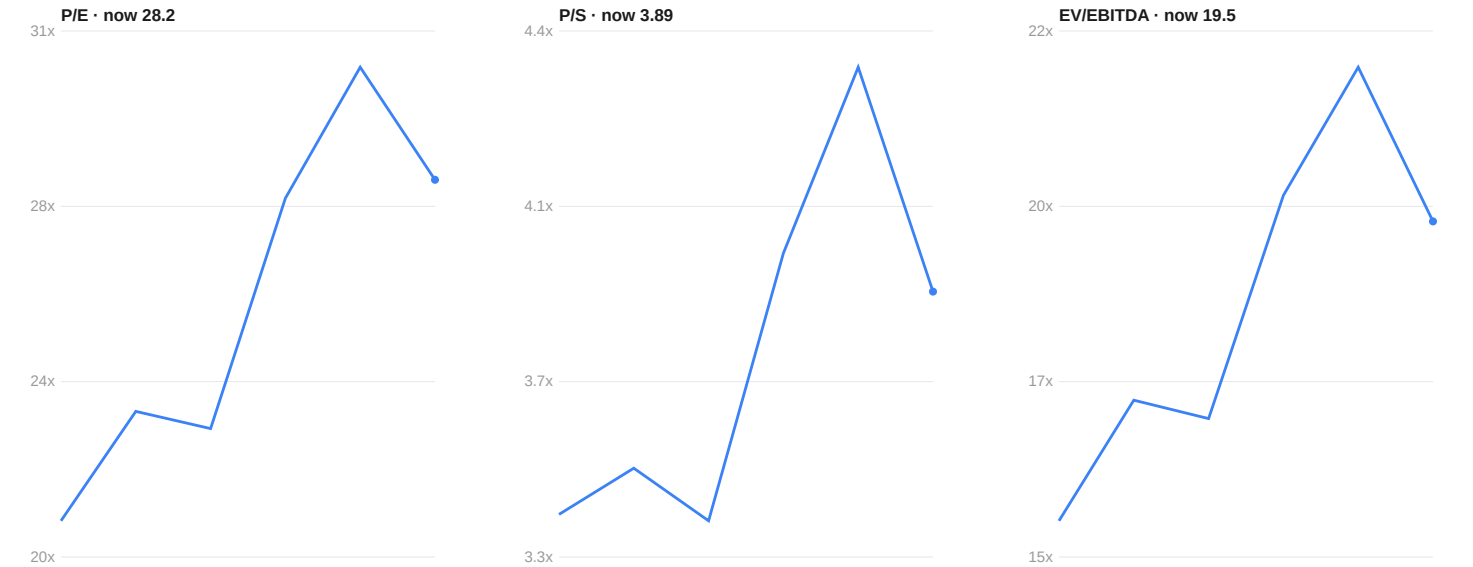
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SHAREHOLDER RETURN PROFILE live

BUYBACK YIELD 4.39%	DIVIDEND YIELD 0.00% none paid	TOTAL SHAREHOLDER RETURN 4.30% cash yield	SBC / REVENUE 0.2% dilution pressure
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26 MULTIPLE HISTORY — FY SNAPSHOTS + TTM live ratio engine



27 PEER COMPARISON live peer engine

COMPANY	MKT CAP	P/E	ROE	NET MARGIN	REV GROWTH	PIOTROSKI	1-YR RET
SE	\$57.4B	34.6	15%	5.7%	+43.1%	6/9	-42.4%
MELI	\$93.0B	49.9	28%	4.6%	+46.0%	6/9	-10.2%
EBAY	\$53.5B	24.3	47%	17.5%	+14.7%	9/9	+33.6%
AZO	\$50.9B	20.0	-87%	14.1%	+7.4%	8/9	-22.1%
WSM	\$29.5B	25.3	55%	17.3%	+2.2%	6/9	—
CPNG	\$25.7B	-32.9	-20%	-6.4%	+9.9%	4/9	—
CASY	\$25.5B	33.0	20%	4.8%	+13.8%	7/9	—
ULTA	\$25.4B	21.5	46%	9.3%	+11.2%	5/9	—

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

28 ANALYST CONSENSUS & ESTIMATES live consensus

Buy

47 Analysts



MEAN TARGET (QTR) \$105.00 7 targets	TARGET VS. PRICE +17.6% last-quarter mean	NEXT REPORT 2026-10-28 street \$0.93	
---	--	---	--

CONSENSUS ESTIMATES	REVENUE MEAN	HIGH / LOW	EPS MEAN	HIGH / LOW	# EPS EST.
FY2026	\$19.14B	\$19.29B / \$18.98B	\$3.29	\$3.34 / \$3.23	20
FY2027	\$20.30B	\$20.61B / \$19.86B	\$3.66	\$3.77 / \$3.57	20
FY2028	\$21.54B	\$22.01B / \$20.90B	\$4.06	\$4.24 / \$3.89	11

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29 STREET TARGETS & THIRD-PARTY RATING

live targets + composite

Street Price Target — Trajectory

WINDOW	AVG TARGET	VS. PRICE	# TARGETS
Last Month	\$94.00	+5.3%	1
Last Quarter	\$105.00	+17.6%	7
Last Year	\$108.32	+21.3%	34
All Time	\$422.90	+373.7%	59

Rolling mean of published targets vs. last close \$89.27. Aggregated from StreetInsider, Benzinga, Pulse 2.0.

Third-Party Composite Rating

C+

DCF

3/5

ROE

1/5

ROA

5/5

DEBT/EQ

1/5

P/E

2/5

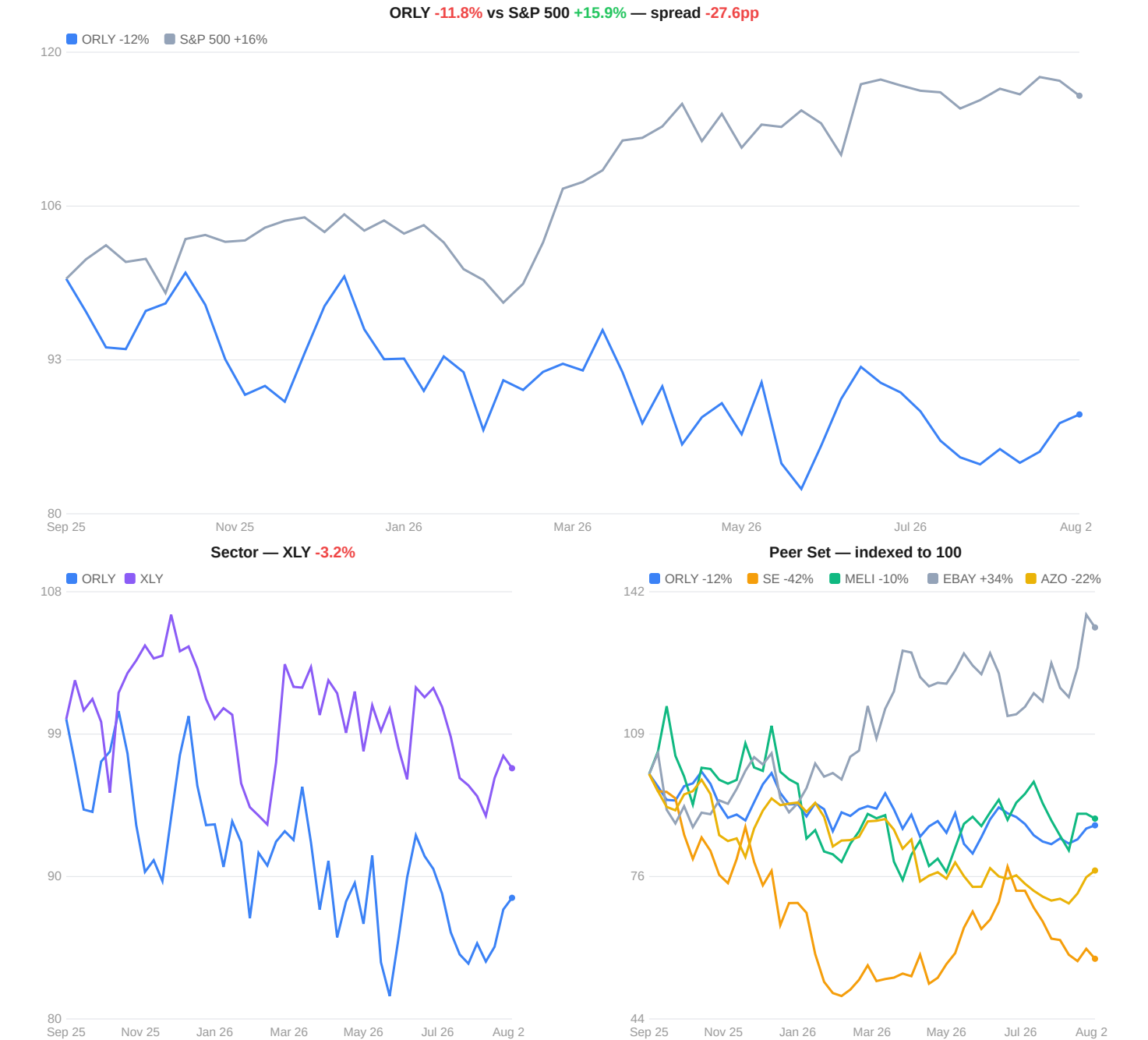
P/B

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.

30 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 (20,2σ) 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	\$85.91	+3.36	+3.91%	Above
SMA 50	\$87.55	+1.72	+1.96%	Above
SMA 200	\$90.67	-1.40	-1.54%	Below
EMA 9	\$87.03	+2.24	+2.57%	Above
EMA 21	\$86.46	+2.81	+3.25%	Above
EMA 50	\$87.03	+2.24	+2.57%	Above
EMA 200	\$89.95	-0.68	-0.76%	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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31 TECHNICAL POWER SCORE

EDGE · site engine · 81/100 composite

TECHNICAL VERDICT

BULLISH

Power Score +62

19 of 22 indicator votes bullish

Family Scores (site weights)

Trend 30%

Momentum 25%

Volume 20%

Volatility 10%

Patterns 15%

78

100

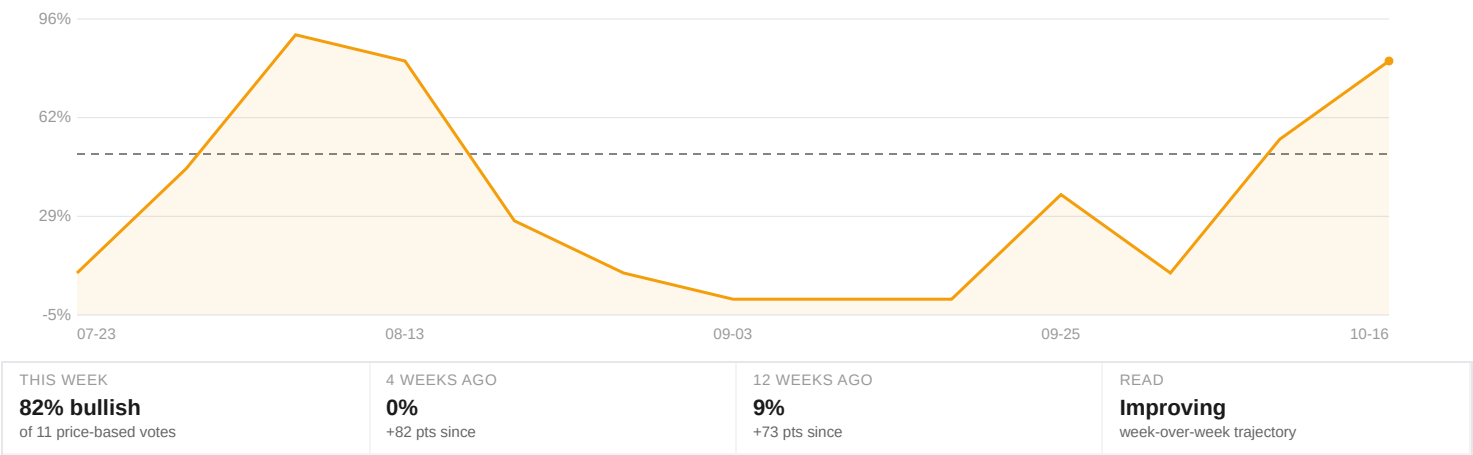
75

100

50

BULLISH — BUT WHICH WAY IS IT TRENDING?

vote share recomputed weekly, 13 weeks



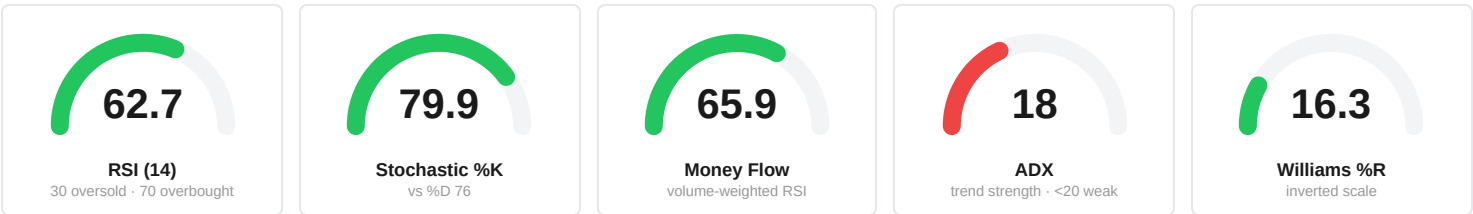
INDICATOR VOTE GRID

19 bull / 3 bear

Price vs SMA 20	\$85.91	Price vs SMA 50	\$87.55	Price vs SMA 200	\$90.67
EMA 9/21 Cross	87.0/86.5	SMA 50/200	Death	ADX Direction	ADX 18
Supertrend	\$84	Parabolic SAR	\$83	SMA Slope	0.230
RSI	62.7	Stochastic K/D	80/76	StochRSI K/D	100/95
Williams %R	-16	CCI	246	TSI vs Signal	3.7
CMO	25.4	ROC	5.15%	OBV Signal	Accum
Chaikin MF	-0.040	MFI	66	Force Index	3M
Elder Ray Bull	4.03				

INDICATOR GAUGES

site technicals-tab style



32 KEY LEVELS & VOLATILITY

live indicator table

LEVEL	VALUE	LEVEL	VALUE
Pivot / R1 / R2	\$88.90 / \$89.58 / \$90.65	S1 / S2	\$87.83 / \$87.15
Bollinger (20,2)	\$83.17 – \$88.65	Squeeze	Off
52-wk range	\$82.59 – \$102.71	Off 52-wk high	-13.1%
ATR (14)	\$1.82 (2.0%)	Historical vol	20.1%

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33 SEASONALITY — 20-YEAR AVERAGES											live model · win rates shown
-0.2% Jan 50%	+2.3% Feb 60%	+1.7% Mar 71%	+3.5% Apr 55%	-0.8% May 45%	-0.3% Jun 60%	+3.0% Jul 70%	+1.5% Aug 45%	+1.2% Sep 60%	+2.9% Oct 60%	+3.6% Nov 85%	+1.2% Dec 40%

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

34 RISK INDICATORS			computed from live price history
COMPUTED FROM LIVE WEEKLY PRICES		ORLY	S&P 500
Weekly volatility (σ , 1y)		3.27%	1.83%
Best / worst week (1y)		+5.2% / -7.7%	—
Max drawdown (5y, monthly)		-41.4%	—
1-week VaR (95%)		-5.5%	—
Beta (5y)		0.52	1.00

35 EQUITY WEATHER & MARKET REGIME		EDGE · live weather engine
ONLY EQUITY WEATHER (LIVE)		MARKET REGIME (2026-10-16)
CLOUDY · +13		NEUTRAL
Trend	+22	VIX 19.99 Normal
Momentum	+44	DOW THEORY Confirmed Bearish
Volume	+40	SPY / QQQ TSI 7.2 / 4.7 trend strength
Volatility	-60	SECTOR STRENGTH 46/100 breadth average
Breadth	-31	



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37 WEATHER - COMPANY VS INDUSTRY, SECTOR, UNIVERSE

EDGE · live weather engine · Cloudy

OVERALL +13.3 +26.1 vs industry	TREND +21.9 +26.4 vs industry	MOMENTUM +43.5 +51.7 vs industry	VOLUME +40.0 +34.5 vs industry
--	--	---	---

READING	ORLY	SPECIALTY RETAIL N=631	CONSUMER CYCLICAL N=5,686	ALL US SYMBOLS N=70,435
Overall	+13.3	-12.8	-20.5	-20.5
Trend	+21.9	-4.5	-25.1	-21.3
Momentum	+43.5	-8.2	-15.0	-15.8
Volume	+40.0	+5.5	-10.0	-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.

38 EXECUTIVE COMPENSATION

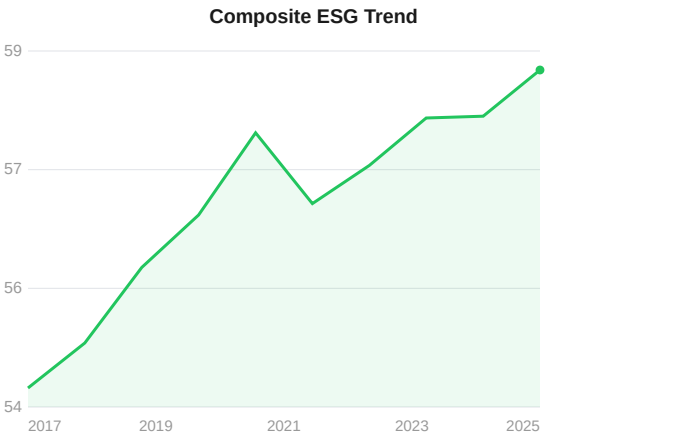
live proxy data · FY2025

EXECUTIVE	TOTAL COMP	STRUCTURE
Brad Beckham Chief Executive Officer	\$4.2M	39% equity+incentive
Brent G. Kirby President	\$3.6M	39% equity+incentive
Jeremy Fletcher Executive Vice President and	\$2.3M	37% equity+incentive
Scott R. Ross Executive Vice President and C	\$1.7M	43% equity+incentive
Jason Tarrant Executive Vice President of St	\$1.4M	43% equity+incentive

39 ESG ASSESSMENT

live disclosure-derived scores

PILLAR (LIVE DISCLOSURE SCORES)	SCORE
Environmental	52
Social	54
Governance	70
Composite ESG	59



40 8-K MATERIAL EVENTS

live EDGAR feed

FILED	8-K CONTENTS	ITEMS
2026-10-01	Regulation FD; Exhibits	7.01,9.01
2026-08-14	Material Agreement; Exhibits	1.01,9.01
2026-08-11	Material Agreement; Exhibits	1.01,9.01
2026-07-29	Earnings Release; Exhibits	2.02,9.01
2026-07-10	Officer/Director Change	5.02
2026-07-01	Regulation FD; Exhibits	7.01,9.01
2026-06-01	Other Events	8.01
2026-05-18	Officer/Director Change; Shareholder Vote	5.02,5.07

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41 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.

42 DISCLOSURES

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43 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 · 2020-10-28 to 2026-07-29
Analyst estimates	dim/forward_estimates	3 rows · 2026-12-31 to 2028-12-31
Institutional ownership (13F)	holdings_db.institutional_ownership_summary	65 rows · 2009 to 2026
Insider transactions (Form 4)	edgar/form4	12 rows · 2026-05-15 to 2026-08-28
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.