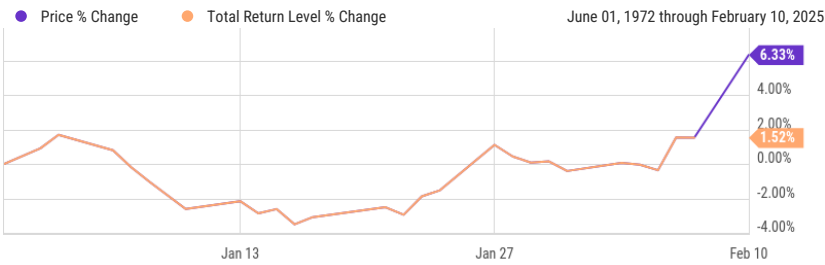


McDonald's Corp



Performance data quoted presents past performance; past performance does not guarantee future results; the investment return and principal value of an investment will fluctuate; an investor's shares, when redeemed, may be worth more or less than their original cost; current performance may be lower or higher than quoted performance data.

| Inc. Statement | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | TTM |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Revenue | 27.44B | 25.41B | 24.62B | 22.82B | 21.26B | 21.36B | 19.21B | 23.22B | 23.18B | 25.49B | 25.94B |
| Operating Margin | 29.04% | 28.94% | 31.76% | 36.76% | 40.61% | 41.89% | 37.52% | 42.51% | 44.62% | 46.07% | 45.52% |
| EBIT Margin | 28.97% | 28.31% | 31.48% | 41.61% | 41.38% | 42.78% | 38.31% | 44.41% | 38.96% | 46.61% | 45.52% |
| Effective Tax Rate | 35.46% | 30.91% | 31.74% | 39.44% | 24.20% | 24.85% | 22.96% | 17.34% | 21.06% | 19.51% | 20.12% |
| Net Income | 4.758B | 4.529B | 4.686B | 5.192B | 5.924B | 6.025B | 4.730B | 7.545B | 6.177B | 8.469B | 8.245B |
| EPS Basic | 4.85 | 4.82 | 5.49 | 6.43 | 7.61 | 7.95 | 6.35 | 10.11 | 8.39 | 11.63 | 11.45 |
| EPS Diluted | 4.82 | 4.80 | 5.44 | 6.37 | 7.54 | 7.88 | 6.31 | 10.04 | 8.33 | 11.56 | 11.39 |

| Balance Sheet | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | Last Qtr. |
|---------------------|--------|--------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| Total Assets | 34.23B | 37.94B | 31.02B | 33.80B | 32.81B | 47.51B | 52.63B | 53.85B | 50.44B | 56.15B | 56.17B |
| Total Liabilities | 21.37B | 30.85B | 33.23B | 37.07B | 39.07B | 55.72B | 60.45B | 58.46B | 56.44B | 60.85B | 61.35B |
| Financial Debt | 14.94B | 24.12B | 25.96B | 29.54B | 31.08B | 34.18B | 37.44B | 35.62B | 35.90B | 39.35B | 40.85B |
| Shareholders Equity | 12.85B | 7.088B | -2.204B | -3.268B | -6.258B | -8.210B | -7.825B | -4.601B | -6.003B | -4.707B | -5.177B |

| Cash Flow | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | TTM |
|----------------------|---------|---------|----------|---------|---------|---------|---------|---------|---------|---------|---------|
| Cash from Operations | 6.730B | 6.539B | 6.060B | 5.551B | 6.967B | 8.122B | 6.265B | 9.142B | 7.387B | 9.612B | 9.305B |
| Cash from Investing | -2.305B | -1.42B | -981.60M | 562.00M | -2.455B | -3.071B | -1.546B | -2.166B | -2.678B | -3.184B | -5.444B |
| Cash from Financing | -4.618B | 735.30M | -11.26B | -5.311B | -5.950B | -4.995B | -2.249B | -5.596B | -6.580B | -4.374B | -6.203B |
| Free Cash Flow | 4.147B | 4.725B | 4.238B | 3.698B | 4.225B | 5.728B | 4.624B | 7.102B | 5.488B | 7.254B | 6.580B |

| Dividend | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | TTM |
|--------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|------|
| Dividend Per Share | 3.28 | 3.44 | 3.61 | 3.83 | 4.19 | 4.73 | 5.04 | 5.25 | 5.66 | 6.23 | 6.68 |
| Payout Ratio | 67.60% | 71.32% | 65.26% | 59.50% | 54.96% | 59.45% | 79.33% | 51.94% | 67.48% | 53.52% | -- |

| Profitability | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | TTM |
|----------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|-----|
| Return on Assets | 13.43% | 12.55% | 13.59% | 16.02% | 17.79% | 15.00% | 9.45% | 14.17% | 11.85% | 15.89% | -- |
| Return on Equity | 32.97% | 45.43% | 191.9% | -- | -- | -- | -- | -- | -- | -- | -- |
| Return on Invested Capital | 16.43% | 15.35% | 17.05% | 20.76% | 23.19% | 23.73% | 17.02% | 24.89% | 20.28% | 26.24% | -- |

| Estimates | Q4 2024 | Q1 2025 | Q2 2025 | Q3 2025 | Q4 2025 | 2024 | 2025 | 2026 |
|-----------|---------|---------|---------|---------|---------|--------|--------|--------|
| EPS | 2.746 | 3.169 | 3.392 | 3.124 | 3.167 | 12.49 | 13.49 | 13.68 |
| Revenue | 6.220B | 6.689B | 6.999B | 6.806B | 6.874B | 26.84B | 28.30B | 28.60B |

| Shareholder Friendliness | Liquidity | Short Interest |
|--------------------------|----------------------|------------------------|
| Dividend Yield | Quick Ratio Annual | Short Interest |
| Net Payout Yield | Current Ratio Ann | Days to Cover Short |
| Net Buyback Yield | Working Capital Ann | Percent of Float Short |
| Debt Paydwn Yield | EBIT/Int Expense Ann | % of Shr Out Short |

McDonald's is the largest restaurant owner-operator in the world, with 2023 system sales of \$130 billion across nearly 42,000 stores and 115 markets. McDonald's pioneered the franchise model, building its footprint through partnerships with independent restaurant franchisees and master franchise partners around the globe. The firm earns roughly 60% of its revenue from franchise royalty fees and lease payments, with most of the remainder coming from company-operated stores across its three core segments: the United States, internationally operated markets, and international developmental/licensed markets.

Currency: USD

| | |
|---|-------------------------------------|
| Symbol: MCD | Price - Feb. 7, 2025 294.30 |
| Sector: Consumer Discretionary | Price Target 320.75 |
| Industry: Hotels, Restaurants & Leisure | 52 Week High - Oct. 21, 2024 317.90 |
| Consensus Rating: Outperform | 52 Week Low - July 9, 2024 243.53 |
| Y-Rating: Neutral | Market Cap 210.90B |
| Last Fiscal Period: -- | |

| Performance | 1M | 3M | YTD | 1Y* | 3Y* | 5Y* | 10Y* |
|--------------|-------|--------|-------|-------|-------|-------|--------|
| Total Return | 1.71% | 0.48% | 1.52% | 4.91% | 6.64% | 9.33% | 14.98% |
| Price Return | 1.71% | -0.12% | 1.52% | 2.43% | 4.24% | 6.82% | 12.09% |

*Figures are annualized.

| Comparables | Total Returns | | | Valuation (TTM) | |
|-------------|---------------|--------|--------|-----------------|-------|
| | 1Y* | 3Y* | 5Y* | P/E | P/S |
| MCD | 4.91% | 6.64% | 9.33% | 25.84 | 8.213 |
| CMG | 7.37% | 25.38% | 27.07% | 51.59 | 6.968 |
| SBUX | 20.77% | 8.12% | 7.53% | 36.19 | 3.528 |
| YUM | 12.93% | 6.72% | 9.07% | 27.50 | 5.420 |

*Figures are annualized.

| Growth | 3Y | 5Y | 10Y |
|----------------------|--------|--------|--------|
| Revenue | 9.90% | 3.70% | -0.97% |
| Operating Income | 17.68% | 6.35% | 3.27% |
| EPS Basic | 22.35% | 8.85% | 7.60% |
| Total Dividends Paid | 6.50% | 6.84% | 3.82% |
| Book Value | -- | -- | -- |
| Total Assets | 2.18% | 11.34% | 4.36% |

| Valuation | TTM | 3Y Med. | 5Y Med. | Ind. Avg. |
|-------------|-------|---------|---------|-----------|
| PE Ratio | 25.84 | 25.96 | 26.36 | 28.30 |
| PS Ratio | 8.213 | 8.235 | 8.254 | 3.232 |
| PB Ratio | -- | -- | -- | 5.984 |
| Price/FCF | 32.38 | 30.88 | 30.88 | 35.09 |
| EV/EBITDA | 18.00 | 18.16 | 18.45 | 17.43 |
| EV/EBIT | 21.11 | 21.32 | 21.84 | 21.90 |
| EV/Revenue | 9.609 | 9.558 | 9.652 | 3.794 |
| EV/FCF | 37.89 | 35.78 | 35.78 | 38.59 |
| EV/Assets | 4.568 | 4.454 | 4.454 | 2.807 |
| P/E Forward | 23.56 | -- | -- | -- |
| P/S Forward | 7.859 | -- | -- | -- |
| PEG Forward | 2.915 | -- | -- | -- |

| Risk | 3Y | 5Y | 10Y |
|-------------------------|--------|--------|--------|
| Beta | 0.6566 | 0.7388 | 0.6439 |
| Standard Deviation | 18.42% | 18.57% | 18.35% |
| Historical Sharpe Ratio | 0.1041 | 0.3317 | 0.7189 |
| Max Drawdown | 17.22% | 36.89% | 36.89% |
| VaR 5% | 1.63% | 1.69% | 1.67% |
| Historical Sortino | 0.2121 | 0.6674 | 0.9739 |

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