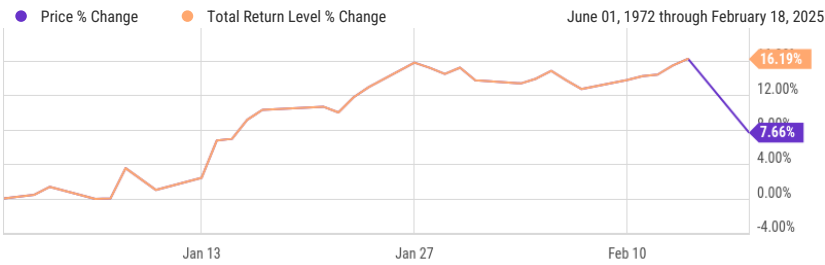


# Medtronic PLC



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	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	TTM
Revenue	20.26B	28.83B	29.71B	29.95B	30.56B	28.91B	30.12B	31.69B	31.23B	32.36B	33.00B
Operating Margin	22.49%	20.67%	20.15%	20.14%	21.70%	18.06%	16.25%	18.65%	18.67%	17.06%	17.41%
EBIT Margin	20.49%	19.85%	19.17%	22.77%	21.73%	17.80%	16.00%	19.16%	19.21%	17.17%	17.94%
Effective Tax Rate	23.26%	18.40%	12.56%	45.46%	10.53%	-18.52%	6.80%	8.27%	29.46%	23.42%	16.16%
Net Income	2.675B	3.538B	4.028B	3.104B	4.631B	4.789B	3.606B	5.039B	3.758B	3.676B	4.288B
EPS Basic	2.44	2.51	2.92	2.29	3.44	3.57	2.68	3.75	2.83	2.77	3.28
EPS Diluted	2.41	2.48	2.89	2.27	3.41	3.54	2.66	3.73	2.82	2.76	3.27

Balance Sheet	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Last Qtr.
Total Assets	106.68B	99.64B	99.86B	91.39B	89.69B	90.69B	93.08B	90.98B	90.95B	89.98B	90.04B
Total Liabilities	53.46B	47.58B	49.53B	40.57B	39.48B	39.82B	41.48B	38.26B	39.28B	39.56B	41.33B
Financial Debt	35.96B	30.88B	33.37B	25.74B	25.30B	24.75B	26.32B	24.05B	24.30B	24.96B	28.28B
Shareholders Equity	53.23B	52.06B	50.21B	50.72B	50.09B	50.74B	51.43B	52.55B	51.48B	50.21B	48.49B

Cash Flow	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	TTM
Cash from Operations	4.902B	5.218B	6.88B	4.684B	7.007B	7.234B	6.24B	7.346B	6.039B	6.787B	7.195B
Cash from Investing	-17.06B	2.245B	-1.571B	5.858B	-774.00M	-3.203B	-2.866B	-1.659B	-3.493B	-2.366B	-2.007B
Cash from Financing	15.95B	-9.543B	-3.283B	-11.95B	-5.431B	-4.198B	-4.136B	-5.336B	-4.96B	-4.45B	-5.124B
Free Cash Flow	4.331B	4.172B	5.626B	3.616B	5.873B	6.021B	4.885B	5.978B	4.58B	5.20B	5.499B

Dividend	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	TTM
Dividend Per Share	1.22	1.52	1.72	1.84	2.00	2.16	2.32	2.52	2.72	2.76	2.78
Payout Ratio	49.98%	60.46%	58.99%	80.35%	58.15%	60.43%	86.52%	67.14%	96.22%	99.73%	--

Profitability	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	TTM
Return on Assets	3.70%	3.43%	4.04%	3.25%	5.11%	5.31%	3.92%	5.48%	4.13%	4.06%	--
Return on Equity	7.36%	6.72%	7.87%	6.14%	9.17%	9.48%	7.04%	9.66%	7.20%	7.20%	--
Return on Invested Capital	4.45%	4.11%	4.83%	3.87%	6.09%	6.34%	4.70%	6.51%	4.92%	4.86%	--

Estimates	Q3 2025	Q4 2025	Q1 2026	Q2 2026	Q3 2026	2025	2026	2027
EPS	1.605	1.323	1.407	1.444	1.445	5.454	5.824	6.281
Revenue	8.852B	8.339B	8.750B	8.733B	8.740B	33.57B	35.10B	36.85B

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 Outst Short

One of the largest medical-device companies, Medtronic develops and manufactures therapeutic medical devices for chronic diseases. Its portfolio includes pacemakers, defibrillators, heart valves, stents, insulin pumps, spinal fixation devices, neurovascular products, advanced energy, and surgical tools. The company markets its products to healthcare institutions and physicians in the United States and overseas. Foreign sales account for roughly 50% of the company's total sales.

Currency: USD

Symbol: MDT	Price - Feb. 14, 2025 92.81
Sector: Health Care	Price Target 94.96
Industry: Health Care Equipment & Supplies	52 Week High - Jan. 28, 2025 93.08
Consensus Rating: Outperform	52 Week Low - July 9, 2024 75.96
Y-Rating: Neutral	Market Cap 119.01B
Last Fiscal Period: --	

Performance	1M	3M	YTD	1Y*	3Y*	5Y*	10Y*
Total Return	8.87%	8.85%	16.19%	14.69%	0.00%	-1.84%	4.67%
Price Return	8.87%	7.92%	16.19%	10.91%	-3.20%	-4.58%	2.12%

\*Figures are annualized.

Comparables	Total Returns			Valuation (TTM)	
	1Y*	3Y*	5Y*	P/E	P/S
MDT	14.69%	0.00%	-1.84%	28.38	3.684
BSX	60.89%	35.42%	20.19%	84.89	9.415
NVRO	-66.35%	-56.68%	-47.24%	--	0.5007
ABT	18.95%	4.07%	9.73%	17.07	5.444

\*Figures are annualized.

Growth	3Y	5Y	10Y
Revenue	2.43%	1.16%	6.65%
Operating Income	4.09%	-3.60%	1.37%
EPS Basic	1.11%	-4.24%	-0.99%
Total Dividends Paid	5.52%	6.36%	12.63%
Book Value	-0.79%	0.05%	9.95%
Total Assets	-1.12%	0.06%	9.02%

Valuation	TTM	3Y Med.	5Y Med.	Ind. Avg.
PE Ratio	28.38	27.43	28.86	--
PS Ratio	3.684	3.548	3.834	--
PB Ratio	2.454	2.187	2.375	--
Price/FCF	22.10	22.85	24.32	--
EV/EBITDA	16.30	14.86	15.75	--
EV/EBIT	23.57	21.50	22.80	--
EV/Revenue	4.228	4.056	4.307	--
EV/FCF	25.37	25.98	27.20	--
EV/Assets	1.499	1.420	1.420	--
P/E Forward	17.02	--	--	--
P/S Forward	3.546	--	--	--
PEG Forward	0.1744	--	--	--

Risk	3Y	5Y	10Y
Beta	0.7912	0.8414	0.7642
Standard Deviation	21.96%	21.77%	20.74%
Historical Sharpe Ratio	-0.2366	-0.2045	0.156
Max Drawdown	45.10%	45.10%	45.10%
VaR 5%	2.24%	2.28%	2.16%
Historical Sortino	-0.4779	-0.405	0.2228

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