

WEIGHTED FAIR VALUE

\$270.19

MARKET PRICE

\$1,094.44

IMPLIED UPSIDE

-75.3%

SCENARIO ANALYSIS

SCENARIO	PROBABILITY	IMPLIED PRICE	WACC	TERMINAL GROWTH
Bull	30%	\$293.46	0.0%	3.0%
Base	50%	\$289.10	0.0%	2.5%
Bear	20%	\$187.99	0.0%	2.0%

SCENARIO PRICE COMPARISON



SENSITIVITY: WACC x TERMINAL GROWTH



PER-SCENARIO ASSUMPTIONS

Bull

METRIC

- Revenue Growth %
- EBIT Margin %
- Capex %
- D&A %

Base

METRIC

- Revenue Growth %
- EBIT Margin %
- Capex %
- D&A %

Bear

METRIC

- Revenue Growth %
- EBIT Margin %

Capex %

D&A %

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