

\$407.37 **-\$6.79 (-1.64%)** as of Friday's close

Cap (\$M USD)
\$404,666

P/E
27.6

EPS (1Y)
-2.5%

Dividend
\$9.00

Last Filing
10/31/24

52-wk Range

\$323.77  \$439.37

Sales (\$M)
154,596

Forward P/E
25.9

Sales (1Y)
1.3%

Div. Yield
2.2%

Next Earnings
02/25/25

Dividend Adjusted Return *Feb 7, 2024 - Feb 7, 2025*

HD 407.37 (+17.2%) **Consumer Cyclical 378.30 (+26.9%)** **S&P 500 6025.99 (+23.2%)**



HD has underperformed the S&P 500 by -6.0% in the past year.

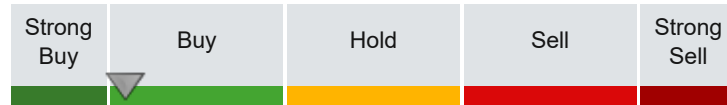
HD has underperformed its sector by -9.8% in the past year.

The Consumer Cyclical sector has outperformed the market by 3.7% in the past year.

ANALYST CONSENSUS

Buy

The consensus rating is unchanged from 1 month ago.



Strong Buy | 26
Buy | 1
Hold | 8
Sell | 0
Strong Sell | 1

QUANTITATIVE SCORES

Fair Value \$352.50

The Margin of Safety is the difference between a company's Fair Value and the current price. See more on page 8.

2 warnings
Details on Page 8

Margin of Safety -13%

Value Score

69

Value Score: Our value score looks at EV/EBITDA, P/E, P/S, P/TB (Price/Tangible Book) and EPS Predictability. P/S and P/TB are compared within a sector. Other metrics are compared across all stocks

Quality Score

85

Quality Score: Our quality score compares profitability and balance sheet metrics to find high quality companies using ROIC, Net Margin, Gross Margin, Interest Coverage, and Debt / Equity metrics.

Growth Score

79

Growth Score: Our growth score looks at the 5 year history and the forward estimates for EBITDA, Sales, and EPS growth, ranking the best companies across all stocks.

Sentiment Score

38

Sentiment Score: Our sentiment score finds stocks in favor by analyzing Short Interest, returns in key periods over the last year, Price vs. 52-wk High, Days Since 52-wk High and MACD signals.

BUSINESS SUMMARY

Home Depot is the world's largest home improvement specialty retailer, operating more than 2,300 warehouse-format stores offering more than 30,000 products in store and 1 million products online in the US, Canada, and Mexico. Its stores offer numerous building materials, home improvement products, lawn and garden products, and decor products and provide various services, including home improvement installation services and tool and equipment rentals. The acquisition of Interline Brands in 2015 allowed Home Depot to enter the MRO business, which has been expanded through the tie-up with HD Supply (2020). The additions of the Company Store brought textiles to the lineup, and the recent tie-up with SRS will help grow professional demand in roofing, pool and landscaping projects.

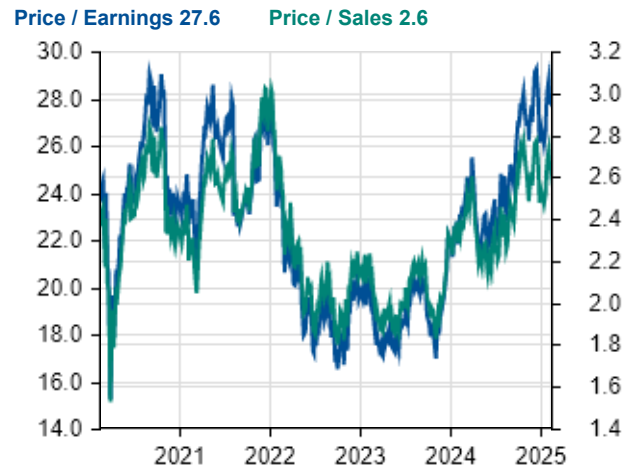
Employees 471,600

Homepage www.homedepot.com

Headquarters Atlanta, GA

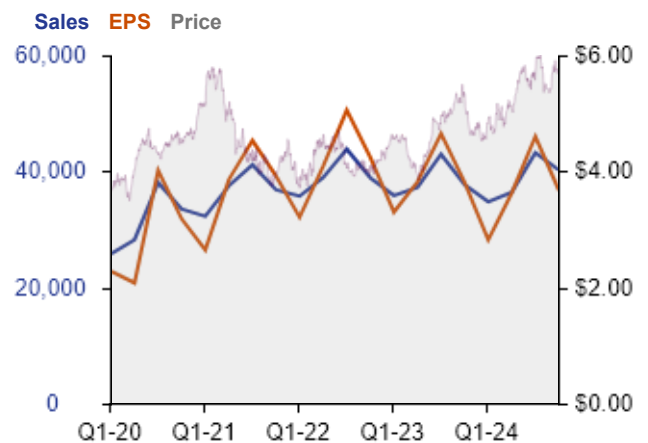
VALUATION SUMMARY

	HD	Industry	S&P 500
Value Score	69	70	70
Price / Earnings	27.6	25.8	30.0
Price / Sales	2.6	2.1	3.2
Price / Free Cash Flow	24.3	21.6	40.0
Price / Book	69.9	41.4	5.4
Price / Tangible Book	-	-	465.9
EV / EBITDA	18.7	18.0	24.3
EPS Predict. Pctl.	99	78	69
Piotroski F Score	6	6	7
5-Year P/E Range	15.1		29.3
5-Year P/B Range	66.0		-
5-Year P/S Range	1.5		3.0



GROWTH SUMMARY

	HD	Industry	S&P 500
Growth Score	79	65	78
Sales Growth			
Sales Growth Next Year	3.6%	3.3%	11.5%
Sales 1-Year Chg (%)	1.3%	2.2%	13.1%
Sales 3-Year Avg (%)	0.8%	0.1%	8.9%
Sales 5-Year Avg (%)	7.0%	6.3%	13.2%
EPS Growth			
Next Yr. Growth Est.	4.2%	4.4%	15.0%
EPS 1-Year Chg (%)	-2.5%	-2.4%	8.6%
EPS 3-Year Avg (%)	-1.7%	-1.4%	6.9%
EPS 5-Year Avg (%)	7.5%	9.1%	11.4%

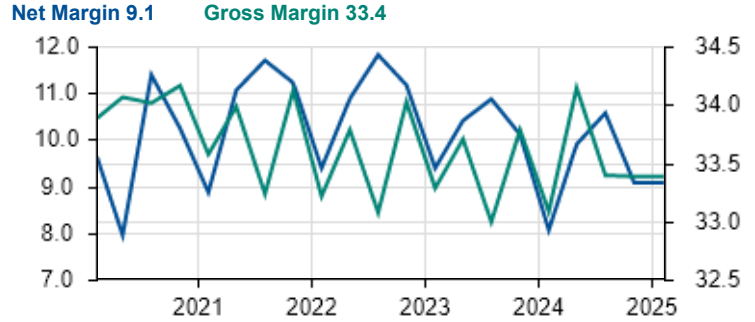


PEERS ANALYSIS SUMMARY

Ticker	Company	Cap (\$M USD)	P/E	Div. Yield	1M Return	1Y Return	Margin of Safety	Value Score	Growth Score	Quality Score
HD	Home Depot	\$404,666	27.6	2.2%	6.0%	15.1%	-13%	69	79	85
BABA	Alibaba Gr Hldgs	\$248,252	21.5	1.9%	22.5%	43.6%	12%	72	91	86
PDD	PDD Holdings	\$158,694	11.3	-	13.6%	-11.3%	11%	78	95	100
LOW	Lowe's Companies	\$142,879	21.0	1.8%	2.6%	15.7%	-7%	72	60	80
TJX	TJX Companies	\$140,171	29.4	1.2%	3.8%	29.2%	-12%	63	89	89
MELI	MercadoLibre	\$101,224	70.9	-	12.7%	16.5%	-8%	53	99	85
ORLY	O'Reilly Automotive	\$75,689	32.4	-	9.8%	23.4%	-23%	63	91	89
SE	Sea	\$70,643	500+	-	15.6%	182.0%	-29%	54	72	64
JD	JD.com	\$64,048	13.0	1.9%	14.8%	79.3%	10%	84	90	80
AZO	AutoZone	\$57,398	22.9	-	4.9%	20.3%	-20%	67	91	88
CPNG	Coupage	\$42,543	41.5	-	4.0%	64.6%	-15%	51	71	76
FND	Floor & Decor Hldgs	\$10,834	56.2	-	6.2%	-3.7%	-15%	62	89	74

PROFITABILITY SUMMARY

	HD	Industry	S&P 500
Quality Score	85	65	77
Gross Margin	33.5%	34.2%	30.3%
Operating Margin	13.7%	11.8%	14.8%
Net Margin	9.5%	8.0%	10.5%
Return on Assets	17.6%	14.9%	9.9%
Return on Equity	252.5%	905.1%	33.0%
ROIC	24.3%	24.3%	23.5%



RETURNS SUMMARY

	HD	Industry	S&P 500
Sentiment Score	38	36	59
5-Day Return	-1.1%	-1.3%	-0.2%
1-Month Return	6.0%	5.0%	2.0%
YTD Return	4.7%	4.0%	2.5%
1-Year Return	15.1%	13.8%	22.2%
3-Year Return	23.1%	21.3%	40.5%
5-Year Return	93.7%	95.9%	95.4%
Beta 1-Year	0.72	0.68	1.01

Dividend Adjusted Return Feb 7, 2024 - Feb 7, 2025

HD 414.29 (+18.6%)



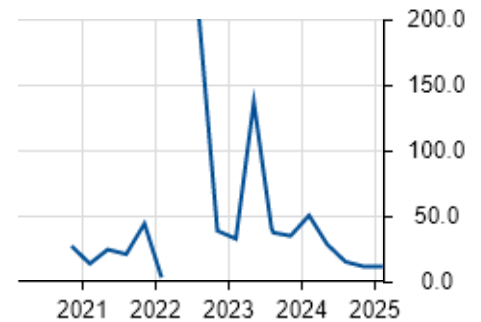
DIVIDEND

	HD	Industry
Dividend Yield	2.2%	2.2%
Payout Ratio	59.9%	55.2%
TTM Yield	2.2%	-
Dividend Per Share	\$9.00	\$6.82
Div. 1Y Chg (%)	7.7%	10.1%
Div. 3Y Avg (%)	10.9%	12.8%
Div. 5Y Avg (%)	10.6%	13.2%
Cons. Growth Years	10+	10+
Div. Coverage Ratio	1.6	1.8

DEBT & EQUITY

Current Ratio	1.1
Quick Ratio	0.3
Price	\$407.37
Net Cash Per Share	-\$62.48
Equity Per Share	\$5.82
Debt / Equity	11.0
Solvency Ratio	21%
Interest Coverage	9.7
Short % of Float	1.1%
Altman Z-Score	6.3

Debt / Equity 10.9



ANALYST REVISIONS

Current Quarter EPS		Next Quarter EPS	
# Up Last 30 days	0.00	# Up Last 30 days	7.00
# Down Last 30 days	1.00	# Down Last 30 days	9.00
Mean Estimate	3.01	Mean Estimate	3.69
% Change (30 Days)	-0.07%	% Change (30 Days)	0.16%

MEAN ESTIMATE TREND

	Cur Qtr	Next Qtr	Cur Year	Next Year
Latest	\$3.01	\$3.69	\$15.11	\$15.75
30 Days Ago	\$3.01	\$3.69	\$15.11	\$15.74
90 Days Ago	\$3.02	\$3.73	\$14.99	\$15.71
% Change (90 Days)	-0.2%	-0.9%	0.8%	0.2%

EARNINGS SURPRISES

Earnings surprise is the difference between a company's announced earnings and the average analyst estimated value. Surprises typically causes the stock price to jump and are often followed by more of the same surprise type.

Surprise Detail (Last 6 Quarters)

Surprise Summary (Last 12 Quarters)

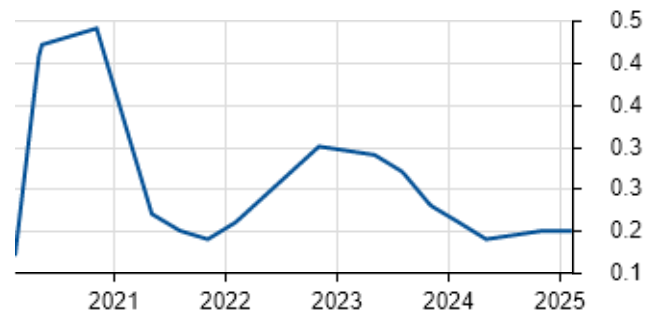
Surprise Type	Amount	Percent
Positive Quarters (> 2%)	5	41.7%
Negative Quarters (< 2%)	0	-
In-Line Quarters (within 2%)	7	58.3%

Surprise Type	Announce Date	Period End Date	Actual EPS	Est. EPS	Surprise (%)
In-Line	11/12/24	10/31/24	\$3.67	\$3.64	0.8%
Positive	08/13/24	07/31/24	\$4.60	\$4.49	2.4%
In-Line	05/14/24	04/30/24	\$3.63	\$3.60	0.8%
In-Line	02/20/24	01/31/24	\$2.82	\$2.77	1.8%
In-Line	11/14/23	-	\$3.81	\$3.76	1.3%
Positive	08/15/23	-	\$4.65	\$4.45	4.5%

RISK

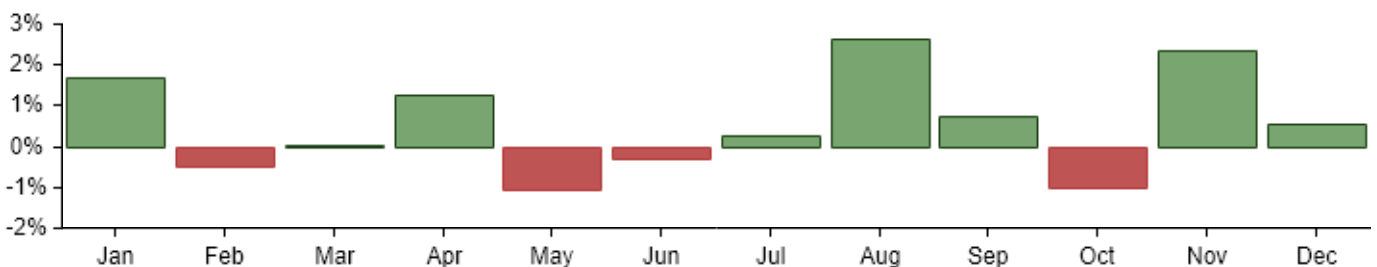
	HD	Industry	S&P 500
Best Monthly Return (5Y)	23.1%	21.7%	17.9%
Worst Monthly Return (5Y)	-18.8%	-19.3%	-16.4%
Beta 1-Year	0.72	0.68	1.01
Volatility 1-Year	0.20	0.18	0.13
Volatility 1Y Pctl.	19	-	-
Max Drawdown 1-Year	-17.7%	-17.8%	-8.5%
Max Drawdown 3-Year	-25.4%	-26.3%	-22.1%
Max Drawdown 5-Year	-38.0%	-41.0%	-33.5%

HD Volatility 1-Year 0.2



SEASONALITY

Seasonal Performance vs the S&P 500



5-YEAR RELATIVE PERFORMANCE VS S&P 500

Relative to the S&P 500 baseline, HD has performed nearly in line with the S&P 500 over the past 5 Years.

HD has underperformed its sector by -10.2% in the past 5 Years.

The Consumer Cyclical sector has outperformed the market by 8.3% in the past 5 Years.

Dividend Adjusted Return Feb 7, 2020 - Feb 7, 2025

HD 407.37 (-1.9%) Consumer Cyclical 378.30 (+8.3%) S&P 500 6025.99 (0.0%)



Overall Rating vs. Peers

65

Ratings scores are relative to industry groups. They compare key metrics to rank stocks vs. their competitors. For example, higher growth than peers will score high even when the absolute growth is below the market average.

Growth vs Peers

Ticker	Company	Growth Rating vs. Peer	Sales QoQ Chg.	Eps QoQ Chg.	Sales Growth Next Y.	Sales 1Y Chg (%)	Sales 3Y Avg (%)	Sales 5Y Avg (%)
JD	JD.com	94	5.1%	54.4%	6.4%	3.1%	5.5%	14.1%
BABA	Alibaba Gr Hldgs	61	5.2%	67.4%	8.1%	3.7%	4.8%	14.5%
HD	Home Depot	57	6.7%	-3.7%	3.6%	1.3%	0.8%	7.0%
FND	Floor & Decor Hldgs	47	0.9%	-21.3%	9.7%	-0.4%	8.6%	16.5%
LOW	Lowe's Companies	35	-1.5%	-2.3%	1.6%	-3.1%	-4.5%	3.0%

Valuation vs Peers

Ticker	Company	Valuation Rating vs. Peer	P/E	Forward P/E	PEG Trailing	P/S	P/B	5Y P/E Range
JD	JD.com	93	13.0	1.2	0.6	0.4	1.9	10.1 -
BABA	Alibaba Gr Hldgs	50	21.5	1.5	-	1.9	1.9	9.5 - 164.9
LOW	Lowe's Companies	33	21.0	20.2	1.2	1.7	-	13.9 - 33.2
FND	Floor & Decor Hldgs	21	56.2	50.7	12.3	2.5	5.1	18.8 - 73.4
HD	Home Depot	8	27.6	25.9	3.7	2.6	69.9	15.1 - 29.3

Efficiency vs Peers

Ticker	Company	Efficiency Rating vs. Peer	Gross Margin	Operating Margin	Net Margin	5Y ROE Range	5Y ROA Range
HD	Home Depot	99	33.5%	13.7%	9.5%	-2856.8% - 844.7%	17.6% - 23.6%
LOW	Lowe's Companies	96	33.2%	12.3%	8.2%	-3988.6% - 404.4%	11.2% - 18.4%
JD	JD.com	83	15.6%	3.5%	3.1%	-4.9% - 27.5%	-2.2% - 14.8%
BABA	Alibaba Gr Hldgs	75	38.2%	12.2%	9.0%	1.4% - 21.7%	0.8% - 14.7%
FND	Floor & Decor Hldgs	39	43.0%	6.6%	4.5%	9.3% - 24.1%	4.2% - 10.1%

Financial Strength vs Peers

Ticker	Company	Financial Str. Rating vs. Peers	Debt / Equity	Interest Coverage	Quick Ratio	Intangibles %	Solvency Ratio	Short % of Float
BABA	Alibaba Gr Hldgs	94	0.2	7.1	1.4	16.0%	14%	3.1%
FND	Floor & Decor Hldgs	82	0.8	65.7	0.3	8.3%	15%	12.7%
JD	JD.com	80	0.4	15.9	0.9	10.3%	10%	3.0%
HD	Home Depot	49	11.0	9.7	0.3	29.3%	21%	1.1%
LOW	Lowe's Companies	30	-	7.1	0.2	-	16%	1.2%

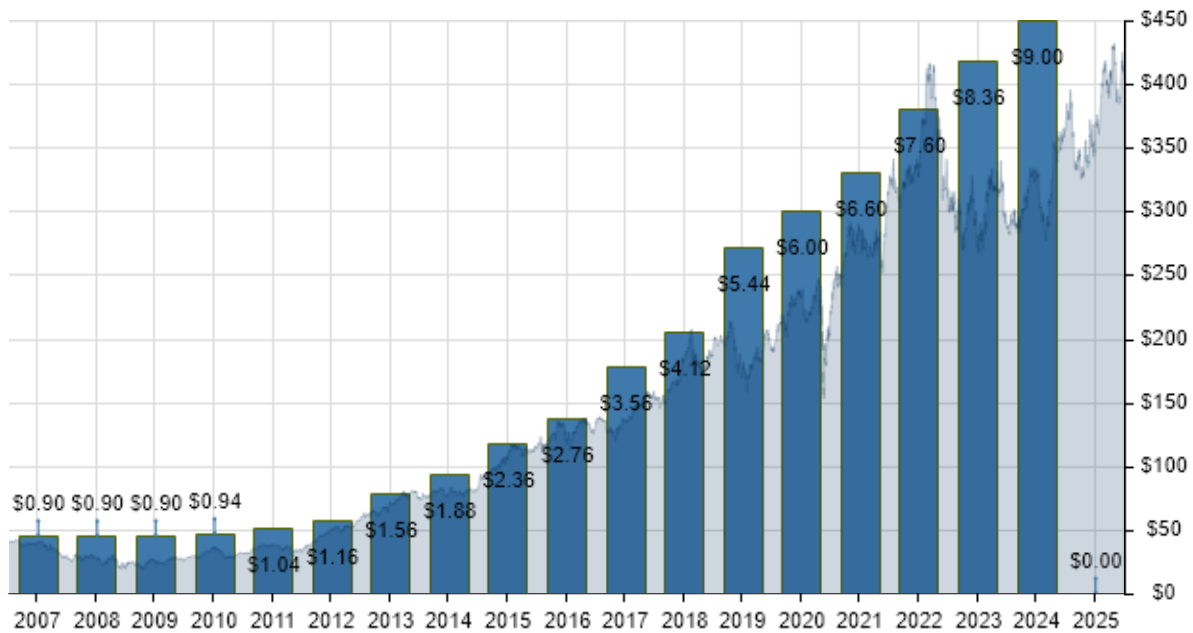
Dividends vs Peers

Ticker	Company	Dividends Rating vs. Peer	Div. Yield	TTM Yield	Price	Div. Per Share	Consecutive Div. Growth Years	Payout Ratio
LOW	Lowe's Companies	75	1.8%	1.8%	\$251.94	\$4.60	10+	37.4%
HD	Home Depot	64	2.2%	2.2%	\$407.37	\$9.00	10+	59.9%
JD	JD.com	42	1.9%	1.9%	\$40.17	\$0.76	1	23.5%
BABA	Alibaba Gr Hldgs	16	1.9%	1.0%	\$103.51	\$2.00	0	40.0%
FND	Floor & Decor Hldgs	-	-	-	\$101.04	-	0	-

Momentum vs Peers

Ticker	Company	Momentum Rating vs. Peer	1M Return	3M Return	6M Return	YTD Return	1Y Return	Beta 1Y	Volatility 1Y	Price vs 52-wk High (%)
BABA	Alibaba Gr Hldgs	94	22.5%	3.4%	33.0%	22.1%	43.6%	0.71	0.36	87.9%
JD	JD.com	93	14.8%	-2.6%	58.6%	15.9%	79.3%	0.99	0.52	84.0%
HD	Home Depot	73	6.0%	2.5%	20.3%	4.7%	15.1%	0.72	0.20	92.7%
FND	Floor & Decor Hldgs	56	6.2%	-0.3%	4.7%	1.3%	-3.7%	1.04	0.38	74.5%
LOW	Lowe's Companies	56	2.6%	-5.0%	9.7%	2.5%	15.7%	0.70	0.21	87.8%

DIVIDEND DETAIL



CALENDAR YEAR DIVIDEND HISTORY

Year	Ex-Dividend	Pay Date	Text	Amount
2024 Dividends				\$9.00
	11/27/24	12/12/24	Regular	\$2.25
	08/29/24	09/12/24	Regular	\$2.25
	05/30/24	06/13/24	Regular	\$2.25
	03/06/24	03/21/24	Regular	\$2.25
2023 Dividends				\$8.36
	11/29/23	12/14/23	Regular	\$2.09
	08/30/23	09/14/23	Regular	\$2.09
	05/31/23	06/15/23	Regular	\$2.09
	03/08/23	03/23/23	Regular	\$2.09
2022 Dividends				\$7.60
	11/30/22	12/15/22	Regular	\$1.90
	08/31/22	09/15/22	Regular	\$1.90
	06/01/22	06/16/22	Regular	\$1.90
	03/09/22	03/24/22	Regular	\$1.90
2021 Dividends				\$6.60
	12/01/21	12/16/21	Regular	\$1.65
	09/01/21	09/16/21	Regular	\$1.65
	06/02/21	06/17/21	Regular	\$1.65
	03/10/21	03/25/21	Regular	\$1.65
2020 Dividends				\$6.00
	12/02/20	12/17/20	Regular	\$1.50
	09/02/20	09/17/20	Regular	\$1.50
	06/03/20	06/18/20	Regular	\$1.50

UPCOMING DIVIDEND

Ex-Dividend Date	11/27/24
Payment Date	12/12/24
Amount	\$2.25
Type	Regular

DIVIDEND RATE

Regular Dividend	\$2.25
Annual Dividend Rate	\$9.00
Annual Dividend Yield	2.2%
Trailing 12 Months Dividends	\$9.00
Trailing 12 Months Yield	2.2%

STATISTICS

Payout Ratio	59.9
Dividend Coverage Ratio	1.6
Consecutive Growth Years	10+
3 Year Growth Rate	10.9%
5 Year Growth Rate	10.6%
10 Year Growth Rate	17.0%

FINANCIAL STATEMENT SUMMARY

USD in Millions	Chart	2019	2020	2021	2022	2023	TTM	CAGR
Income Statement								
Revenue		110,934	125,631	147,699	157,291	153,714	154,596	8.4%
Operating Income		16,065	17,598	22,298	24,112	22,298	21,174	7.0%
Net income		11,105	12,490	15,938	17,095	15,704	14,610	6.9%
Earnings per share diluted		\$10.06	\$11.57	\$14.97	\$16.59	\$15.60	\$14.73	9.7%
Average shares diluted		1,243	1,081	1,067	1,032	1,008	992	-5.3%
P/E Ratio		21.8	23.0	27.7	19.4	21.6	27.6	6.0%
Balance Sheet								
Cash		2,193	14,652	5,067	2,462	2,058	1,531	-8.4%
Current assets		21,174	34,505	30,466	33,681	30,682	32,949	11.4%
Net Property, Plant and Equipm...		28,110	29,281	30,838	31,763	32,806	35,094	5.6%
Working Capital		1,609	9,110	3,563	9,401	7,110	3,857	23.7%
Net Debt		32,858	26,392	40,198	47,251	47,197	61,847	16.7%
Stockholders' Equity		-1,082	1,535	1,035	1,298	1,430	5,786	53.3%
Cash Flow								
Operating Cash Flow		13,666	20,345	14,810	13,206	21,033	19,872	9.6%
Cap Ex		-2,622	-2,290	-2,697	-3,045	-3,271	-3,242	5.3%
Free Cash Flow		11,044	18,055	12,113	10,161	17,762	16,630	10.5%
Free Cash Flow per share		\$8.88	\$16.71	\$11.36	\$9.85	\$17.63	\$16.76	16.7%
Profitability								
Operating Margin		14.5%	14.0%	15.1%	15.3%	14.5%	13.7%	-1.3%
Return on Assets		22.9%	21.9%	-	-	-	17.6%	-6.3%
Return on Equity		-1026.3%	813.7%	-	-	-	252.5%	-31.4%
Return on Invested Capital		36.1%	32.4%	37.3%	36.5%	34.7%	24.3%	-9.2%
Dividends								
Dividends Per Share		\$5.44	\$6.00	\$6.60	\$7.60	\$8.36	\$9.00	13.1%
Dividend Yield		2.5%	2.3%	1.6%	2.4%	2.4%	2.2%	-2.9%
Dividend Growth		-	10.3%	10.0%	15.2%	10.0%	7.7%	-9.1%
Dividend Coverage		2.0x	2.0x	2.3x	2.3x	1.9x	1.7x	-4.0%


VALUATION & PROFITABILITY HISTORY

Date →		TTM	1 Yr Ago	2 Yrs. Ago	3 Yrs. Ago	4 Yrs. Ago
Price / Earnings		27.6	23.3	19.6	23.9	23.4
Price / Cash Flow		20.3	17.4	25.4	25.8	16.0
Price / Book		69.9	250.6	257.2	360.7	90.7
Price / Tangible B...		-	-	-	-	-
Price / Sales		2.6	2.4	2.1	2.6	2.3
EV / EBITDA		18.7	16.6	14.6	16.9	15.7
Dividend Yield		2.2%	2.3%	2.3%	1.9%	2.4%
Shareholder Yield		2.7%	4.4%	4.2%	5.5%	2.5%
Gross Margin		33.5%	33.4%	33.5%	33.6%	34.0%
Net Margin		9.5%	9.9%	10.9%	10.9%	9.7%
Return on Assets		17.6%	-	-	23.1%	21.1%
Return on Equity		252.5%	-	-	-968.0%	390.0%
ROIC		24.3%	31.3%	36.1%	38.2%	34.2%

WARNINGS

Name	Severity	Details
MACD Crossover	Low 	MACD Crossover Days: 2; MACD Divergence: -0.53

The MACD indicator has turned negative in the past week. This is a bearish signal among technical traders.

Declining EPS Growth	Low 	EPS 1Y Chg (%): -2.5%; EPS 3Y Avg (%): -1.7%; EPS 5Y Avg (%): 7.5%
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EPS growth has declined. Comparing EPS growth rates, the 1-year is less than the 3-year which is less than the 5-year. Be sure to understand the reasons as declining earnings growth puts pressure on the stock price.

REPORT TIPS

Metric Definitions

Metric descriptions are available at stockrover.com/help/metrics/metric-overview

Quantitative Scores

Our scores analytics is to offer our concise analysis of a stock in powerful, but easy to digest format. Each of the composite score metrics are designed to use the best available accounting practices as well as source data from SEC filings. The scores are computed for a company vs. the market as a whole.

Fair Value

Fair value performs a forecasted discounted cash flow analysis of a company to determine the company's intrinsic value based on the expected future cash flows the company will produce. It basically determines what a company is worth based on how much cash flow it is expected to generate for you in the future, taking into account the time value of money and the predictability of those forecasted cash flows.

Peers

Peer ratings are computed from ranking companies in the same

DISCLAIMER

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