Walmart (WMT)

Consumer Defensive / Discount Stores

StockRover
Stock Report | April 26, 2025

$95.09 **-$0.75 (-0.78%)** as of Friday's close

Cap ($M USD)	P/E	EPS (1Y)	Dividend	Last Filing
$762,322	**39.5**	**26.2%**	**$0.94**	**01/31/25**
Sales ($M)	Fwd. P/E	Sales (1Y)	Fwd. Yield	Next Earnings
680,985	**32.4**	**5.1%**	**1.0%**	**05/15/25**

52-wk Range
$58.58 $105.30

Dividend Adjusted Return *Apr 25, 2024 - Apr 25, 2025*

WMT 95.09 (+60.6%) **Consumer Defensive 217.94 (+10.5%)** **S&P 500 5525.21 (+10.3%)**

WMT has outperformed the S&P 500 by 50.3% in the past year.

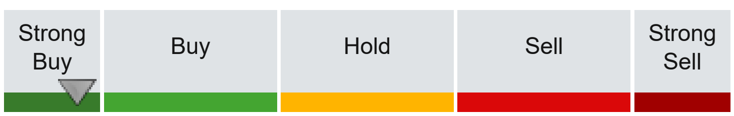
WMT has outperformed its sector by 50.1% in the past year.

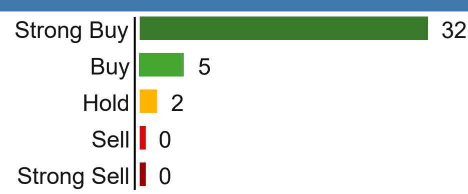
The Consumer Defensive sector has performed nearly in line with the market over the past year.

ANALYST CONSENSUS

Strong Buy

The consensus rating has improved a little since last month when it was also Strong Buy.





QUANTITATIVE SCORES

Fair Value $75.38

Margin of Safety -21%

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

1 warning
Details on Page 8

Value Score 65	**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 81	**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 89	**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 87	**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

Walmart serves as a leading retailer in the United States, with its strategy predicated on superior operating efficiency and offering the lowest priced goods to consumers to drive robust store traffic and product turnover. Walmart augmented its low-price business strategy by offering a convenient one-stop shopping destination with the opening of its first supercenter in 1988.Today, Walmart operates over 4,600 stores in the United States (5,200 including Sam's Club) and over 10,000 locations globally. Walmart generated over $460 billion in domestic namesake sales in fiscal 2025, with Sam's Club contributing another $90 billion to the company's top line. Internationally, Walmart generated $120 billion in sales. The retailer serves around 270 million customers globally each week.

Employees 2,100,000 **Homepage** stock.walmart.com **Headquarters** Bentonville, AR

Walmart (WMT)

Consumer Defensive / Discount Stores

StockRover
Stock Report | April 26, 2025

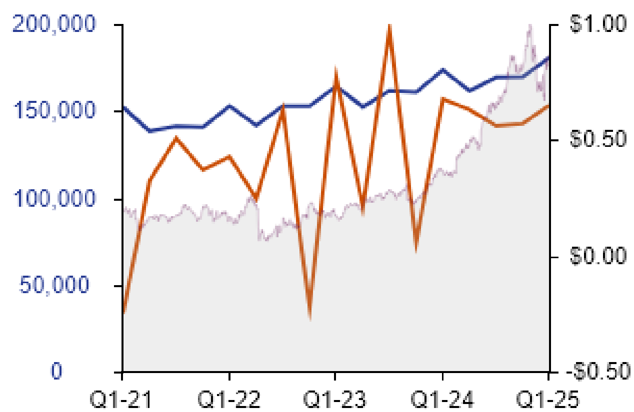
VALUATION SUMMARY

	WMT	Industry	S&P 500
Value Score	65	67	70
Price / Earnings	39.5	37.1	26.4
Price / Sales	1.1	1.2	2.9
Price / Free Cash Flow	60.6	44.1	31.6
Price / Book	8.4	8.6	4.9
Price / Tangible Book	12.3	37.7	500+
EV / EBITDA	19.4	21.3	20.8
EPS Predict. Pctl.	65	90	70
Piotroski F Score	8	7	7

	Low	High
5-Year P/E Range	20.2	55.8
5-Year P/B Range	4.2	9.4
5-Year P/S Range	0.6	1.2

GROWTH SUMMARY

	WMT	Industry	S&P 500
Growth Score	89	77	77
Sales Growth			
Sales Growth Next Year	4.5%	5.3%	9.9%
Sales 1-Year Chg (%)	5.1%	19.1%	12.3%
Sales 3-Year Avg (%)	5.9%	13.0%	7.8%
Sales 5-Year Avg (%)	5.4%	7.8%	11.4%
EPS Growth			
Next Yr. Growth Est.	12.2%	10.6%	14.3%
EPS 1-Year Chg (%)	26.2%	7.7%	12.2%
EPS 3-Year Avg (%)	14.1%	2.2%	8.6%
EPS 5-Year Avg (%)	6.8%	13.5%	13.3%



PEERS ANALYSIS SUMMARY

Ticker	Company	Cap ($M USD	P/E	Fwd. Yield	1M Return	1Y Return	Margin of Safety	Value Score	Growth Score	Quality Score
WMT	Walmart	$762,322	39.5	1.0%	12.2%	59.7%	-21%	65	89	81
COST	Costco Wholesale	$433,549	57.1	0.5%	5.0%	35.9%	-21%	68	94	89
PG	Procter & Gamble	$377,511	25.6	2.6%	-0.5%	1.5%	-7%	65	77	95
KO	Coca-Cola	$309,469	29.2	2.8%	4.5%	20.0%	-18%	59	78	92
PM	Philip Morris Intl	$264,981	26.8	3.2%	11.8%	85.1%	-25%	64	91	89
FMX	Fomento Economico	$187,835	31.5	3.3%	11.5%	-3.1%	-	65	86	65
PEP	PepsiCo	$182,874	19.6	4.1%	-8.4%	-22.0%	15%	70	78	88
UL	Unilever	$156,087	24.2	3.0%	7.8%	27.0%	2%	45	77	84
BUD	Anheuser-Busch I…	$126,986	22.7	1.6%	5.4%	10.1%	26%	67	82	73
KR	Kroger	$46,262	19.1	1.8%	8.8%	27.9%	-11%	84	78	66
TGT	Target	$43,999	10.9	4.6%	-8.4%	-39.5%	25%	97	70	78
DG	Dollar General	$20,578	18.3	2.5%	14.0%	-32.7%	-8%	93	80	61

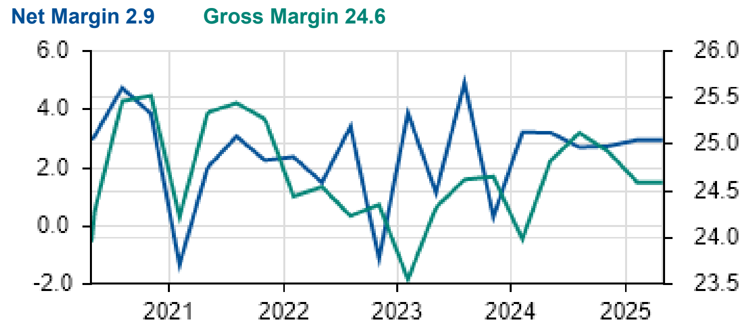
Walmart (WMT)

Consumer Defensive / Discount Stores

StockRover
Stock Report | April 26, 2025

PROFITABILITY SUMMARY

	WMT	Industry	S&P 500
Quality Score	81	66	78
Gross Margin	24.9%	23.0%	31.5%
Operating Margin	4.3%	4.5%	15.1%
Net Margin	2.9%	2.8%	11.1%
Return on Assets	7.6%	7.8%	10.5%
Return on Equity	21.4%	22.5%	33.9%
ROIC	14.3%	16.7%	24.9%



RETURNS SUMMARY

	WMT	Industry	S&P 500
Sentiment Score	87	59	67
5-Day Return	2.0%	1.2%	4.6%
1-Month Return	12.2%	9.7%	-4.4%
YTD Return	5.5%	6.1%	-5.8%
1-Year Return	59.7%	39.7%	10.8%
3-Year Return	89.5%	62.3%	34.4%
5-Year Return	137.1%	147.1%	109.5%
Beta 1-Year	0.65	0.60	1.00

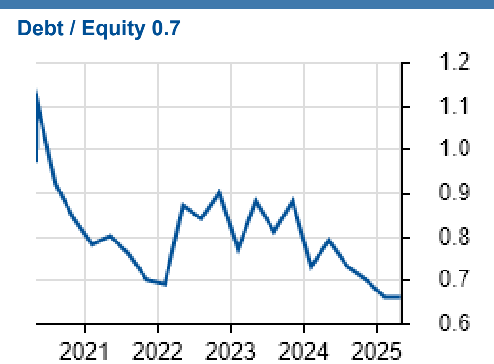
Dividend Adjusted Return *Apr 25, 2024 - Apr 25, 2025*

DIVIDEND

	WMT	Industry
Forward Dividend Yield	1.0%	1.0%
Payout Ratio	34.3%	29.2%
TTM Yield	0.9%	-
Fwd. Div. Per Share	$0.94	$2.03
Div. 1Y Chg (%)	13.3%	6.7%
Div. 3Y Avg (%)	8.0%	9.4%
Div. 5Y Avg (%)	5.5%	11.2%
Cons. Growth Years	10+	7
Div. Coverage Ratio	2.6	2.7

DEBT & EQUITY

Current Ratio	0.8
Quick Ratio	0.2
Price	$95.09
Net Cash Per Share	-$6.36
Equity Per Share	$11.35
Debt / Equity	0.7
Solvency Ratio	22%
Interest Coverage	10.6
Short % of Float	0.9%
Altman Z-Score	6.2



ANALYST REVISIONS

Current Quarter EPS		Next Quarter EPS	
# Up Last 30 days	0.00	# Up Last 30 days	1.00
# Down Last 30 days	15.00	# Down Last 30 days	9.00
Mean Estimate	0.58	Mean Estimate	0.70
% Change (30 Days)	-1.98%	% Change (30 Days)	-0.70%

MEAN ESTIMATE TREND

	Cur Qtr	Next Qtr	Cur Year	Next Year
Latest	$0.58	$0.70	$2.62	$2.94
30 Days Ago	$0.59	$0.71	$2.64	$2.97
90 Days Ago	$0.65	$0.73	$2.76	$3.09
% Change (90 Days)	-10.8%	-4.1%	-4.9%	-4.7%

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 Summary (Last 12 Quarters)

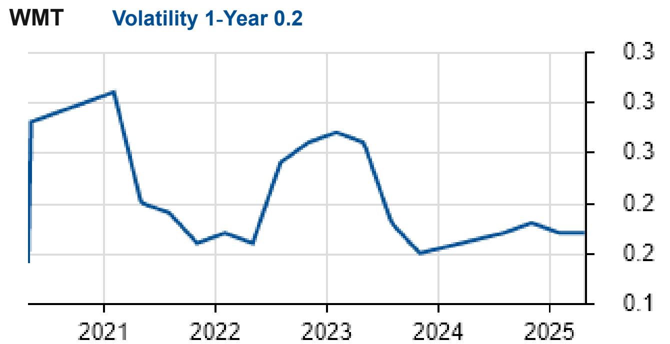
Surprise Type	Amount	Percent
Positive Quarters (> 2%)	10	83.3%
Negative Quarters (< 2%)	1	8.3%
In-Line Quarters (within 2%)	1	8.3%

Surprise Detail (Last 6 Quarters)

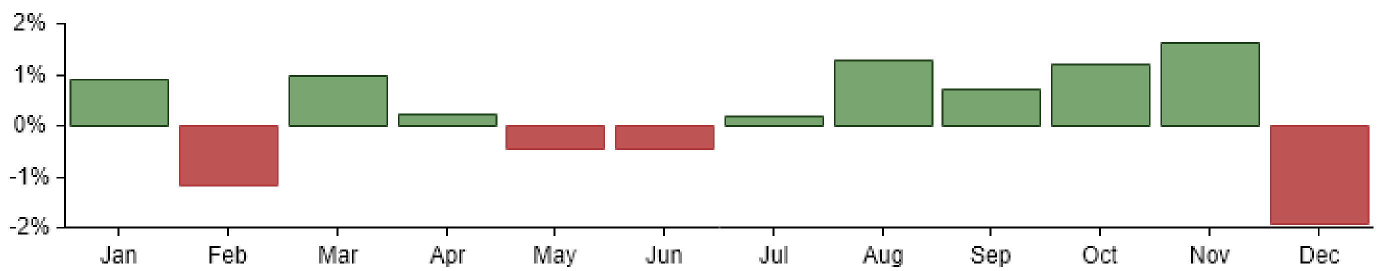
Surprise Type	Announce Date	Period End Date	Actual EPS	Est. EPS	Surprise (%)
Positive	02/20/25	01/31/25	$0.66	$0.64	3.1%
Positive	11/19/24	10/31/24	$0.58	$0.53	9.2%
Positive	08/15/24	07/31/24	$0.67	$0.65	3.6%
Positive	05/16/24	04/30/24	$0.60	$0.52	14.7%
Positive	02/20/24	01/31/24	$0.60	$0.55	9.1%
In-Line	11/16/23	-	$1.53	$1.52	0.7%

RISK

	WMT	Industry	S&P 500
Best Monthly Return (5Y)	12.5%	10.5%	17.9%
Worst Monthly Return (5Y)	-15.4%	-12.9%	-9.6%
Beta 1-Year	0.65	0.60	1.00
Volatility 1-Year	0.24	0.19	0.19
Volatility 1Y Pctl.	22	-	-
Max Drawdown 1-Year	-21.9%	-22.2%	-18.7%
Max Drawdown 3-Year	-24.4%	-27.4%	-18.7%
Max Drawdown 5-Year	-25.7%	-30.4%	-24.6%



SEASONALITY



5-YEAR RELATIVE PERFORMANCE VS S&P 500

Relative to the S&P 500 baseline, WMT has outperformed the S&P 500 by 26.3% in the past 5 Years.

WMT has outperformed its sector by 70.7% in the past 5 Years.

The Consumer Defensive sector has underperformed the market by -44.3% in the past 5 Years.

Overall Rating vs. Peers **57**

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. Peers	Sales QoQ Chg.	Eps QoQ Chg.	Sales Growth Next Y.	Sales 1Y Chg (%)	Sales 3Y Avg (%)	Sales 5Y Avg (%)
COST	Costco Wholesale	93	9.0%	2.6%	7.2%	6.1%	7.9%	10.8%
WMT	Walmart	73	4.1%	-3.9%	4.5%	5.1%	5.9%	5.4%
PG	Procter & Gamble	58	-2.1%	1.3%	3.0%	-0.2%	1.8%	3.6%
DG	Dollar General	37	4.5%	-52.5%	4.0%	5.0%	5.9%	7.9%
TGT	Target	14	-3.1%	-19.1%	2.9%	-0.8%	0.2%	6.4%

Valuation vs Peers

Ticker	Company	Valuation Rating vs. Peers	P/E	Fwd. P/E	PEG Trailing	P/S	P/B	5Y P/E Range
TGT	Target	88	10.9	9.9	1.6	0.4	3.0	10.0 – 30.8
PG	Procter & Gamble	44	25.6	22.6	0.9	4.7	7.3	21.3 – 76.3
DG	Dollar General	21	18.3	15.2	-	0.5	2.8	9.6 – 29.4
WMT	Walmart	7	39.5	32.4	5.8	1.1	8.4	20.2 – 55.8
COST	Costco Wholesale	1	57.1	49.0	3.8	1.7	17.0	31.9 – 65.2

Efficiency vs Peers

Ticker	Company	Efficiency Rating vs. Peers	Gross Margin	Operating Margin	Net Margin	5Y ROE Range	5Y ROA Range
PG	Procter & Gamble	100	51.3%	23.8%	18.5%	27.1% – 32.4%	10.8% – 12.7%
COST	Costco Wholesale	99	12.7%	3.7%	2.9%	21.9% – 32.9%	7.8% – 10.9%
TGT	Target	74	28.2%	5.2%	3.8%	23.4% – 54.4%	5.1% – 13.3%
WMT	Walmart	59	24.9%	4.3%	2.9%	9.7% – 24.2%	3.3% – 8.3%
DG	Dollar General	24	29.6%	4.2%	2.8%	15.2% – 43.6%	3.6% – 10.9%

Financial Strength vs Peers

Ticker	Company	Financial Str. Rating vs. Peers	Debt / Equity	Interest Coverage	Quick Ratio	Intangibles %	Solvency Ratio	Short % of Float
COST	Costco Wholesale	97	0.3	63.1	0.5	-	22%	1.3%
WMT	Walmart	73	0.7	10.6	0.2	11.0%	22%	0.9%
PG	Procter & Gamble	64	0.7	22.3	0.5	50.7%	31%	0.7%
TGT	Target	52	1.4	13.8	0.3	1.1%	18%	3.2%
DG	Dollar General	27	2.4	6.2	0.2	17.8%	9%	5.6%

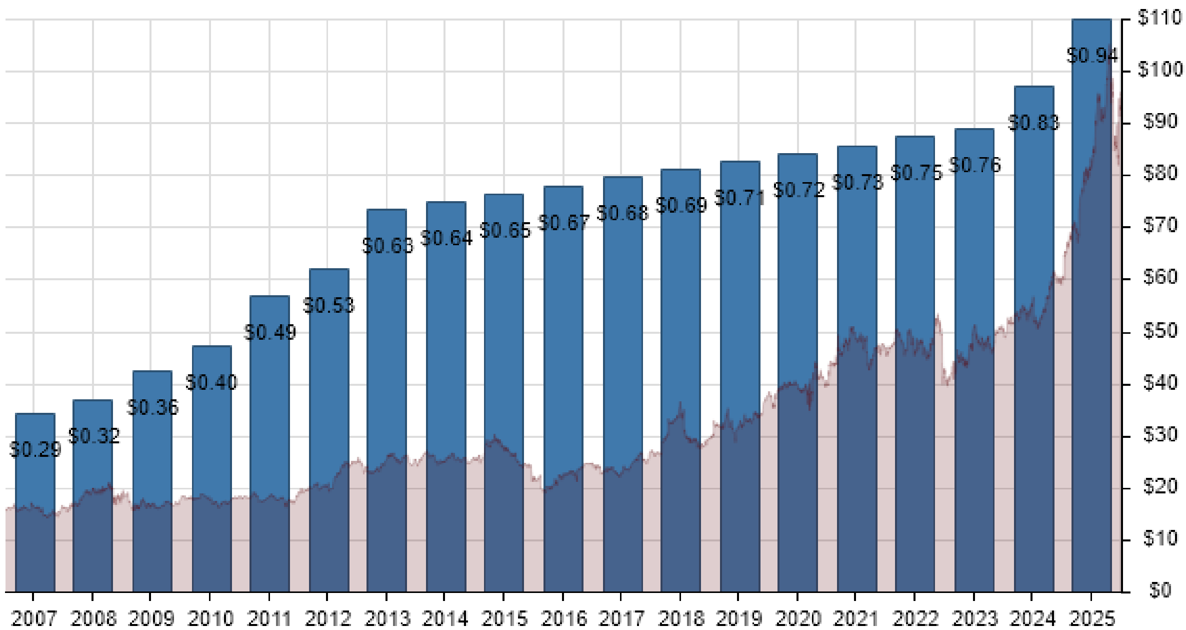
Dividends vs Peers

Ticker	Company	Dividends Rating vs. Peers	Fwd. Yield	TTM Yield	Price	Fwd. Div. Per Share	Consecutive Div. Growth Years	Payout Ratio
TGT	Target	95	4.6%	4.6%	$96.58	$4.48	10+	49.9%
PG	Procter & Gamble	53	2.6%	2.5%	$161.02	$4.23	10+	62.4%
COST	Costco Wholesale	23	0.5%	0.5%	$977.16	$5.20	10+	27.0%
WMT	Walmart	14	1.0%	0.9%	$95.09	$0.94	10+	34.3%
DG	Dollar General	8	2.5%	2.5%	$93.56	$2.36	1	46.1%

Momentum vs Peers

Ticker	Company	Momentum Rating vs. Peers	1M Return	3M Return	6M Return	YTD Return	1Y Return	Beta 1Y	Volatility 1Y	Price vs 52-wk High (%)
WMT	Walmart	97	12.2%	0.6%	15.8%	5.5%	59.7%	0.65	0.24	90.3%
COST	Costco Wholesale	95	5.0%	4.1%	9.9%	6.8%	35.9%	0.65	0.22	90.6%
DG	Dollar General	88	14.0%	31.2%	18.1%	25.2%	-32.7%	-0.09	0.50	63.3%
PG	Procter & Gamble	72	-0.5%	-1.3%	-3.1%	-2.8%	1.5%	0.11	0.19	89.2%
TGT	Target	28	-8.4%	-29.4%	-35.1%	-27.9%	-39.5%	0.79	0.41	57.7%

DIVIDEND DETAIL



CALENDAR YEAR DIVIDEND HISTORY

Year	Ex-Dividend	Pay Date	Text	Amount
2025 Dividends				**$0.94**
	12/12/25	01/05/26	Regular	$0.23
	08/15/25	09/02/25	Regular	$0.23
	05/09/25	05/27/25	Regular	$0.23
	03/21/25	04/07/25	Regular	$0.23
2024 Dividends				**$0.83**
	12/13/24	01/06/25	Regular	$0.21
	08/16/24	09/03/24	Regular	$0.21
	05/09/24	05/28/24	Regular	$0.21
	03/14/24	04/01/24	Regular	$0.21
2023 Dividends				**$0.76**
	12/07/23	01/02/24	Regular	$0.19
	08/10/23	09/05/23	Regular	$0.19
	05/04/23	05/30/23	Regular	$0.19
	03/16/23	04/03/23	Regular	$0.19
2022 Dividends				**$0.75**
	12/08/22	01/03/23	Regular	$0.19
	08/11/22	09/06/22	Regular	$0.19
	05/05/22	05/31/22	Regular	$0.19
	03/17/22	04/04/22	Regular	$0.19
2021 Dividends				**$0.73**
	12/09/21	01/03/22	Regular	$0.18
	08/12/21	09/07/21	Regular	$0.18
	05/06/21	06/01/21	Regular	$0.18

UPCOMING DIVIDEND

Ex-Dividend Date	05/09/25
Payment Date	05/27/25
Amount	$0.23
Type	Regular

DIVIDEND RATE

Regular Dividend	$0.23
Forward Dividend Rate	$0.94
Forward Dividend Yield	1.0%
Trailing 12 Months Dividends	$0.86
Trailing 12 Months Yield	0.9%

STATISTICS

Payout Ratio	34.3
Dividend Coverage Ratio	2.6
Consecutive Growth Years	10+
3 Year Growth Rate	8.0%
5 Year Growth Rate	5.5%
10 Year Growth Rate	3.7%

FINANCIAL STATEMENT SUMMARY

USD in Millions	Chart	2020	2021	2022	2023	2024	TTM	CAGR
Income Statement								
Revenue		548,743	571,962	600,112	638,785	673,819	680,985	5.1%
Operating Income		22,383	25,542	20,754	25,319	28,743	29,348	6.5%
Net income		19,742	8,020	8,967	16,292	19,676	19,436	-0.4%
Earnings per share diluted		$2.31	$0.95	$1.08	$2.00	$2.42	$2.41	1.0%
Average shares diluted		8,552	8,460	8,258	8,112	8,087	8,081	-1.3%
P/E Ratio		20.8	50.7	28.4	30.3	47.1	39.5	16.1%
Balance Sheet								
Cash		14,325	16,111	11,587	12,154	10,049	9,037	-10.1%
Current assets		73,602	82,964	87,680	88,391	86,938	79,458	1.8%
Net Property, Plant and Equipm…		124,289	110,331	115,544	126,824	136,526	139,704	2.7%
Working Capital		-14,519	-4,656	-13,728	-15,839	-15,620	-17,126	3.9%
Net Debt		54,153	41,486	53,793	57,585	51,700	51,077	-1.3%
Stockholders' Equity		81,431	82,274	72,253	79,456	88,108	91,013	2.6%
Cash Flow								
Operating Cash Flow		33,596	29,485	23,588	32,157	39,630	36,443	1.9%
Cap Ex		-9,378	-12,414	-16,579	-19,470	-22,628	-23,783	24.1%
Free Cash Flow		24,218	17,071	7,009	12,687	17,002	12,660	-14.0%
Free Cash Flow per share		$2.83	$2.02	$0.85	$1.56	$2.10	$1.57	-12.8%
Profitability								
Operating Margin		4.1%	4.5%	3.5%	4.0%	4.3%	4.3%	1.3%
Return on Assets		8.3%	3.3%	3.7%	6.5%	7.7%	7.6%	-2.1%
Return on Equity		24.2%	9.7%	12.4%	20.5%	22.3%	21.4%	-2.9%
Return on Invested Capital		14.8%	7.2%	7.9%	12.7%	14.9%	14.3%	-0.8%
Dividends								
Dividends Per Share		$0.72	$0.73	$0.75	$0.76	$0.83	$0.94	6.4%
Dividend Yield		1.5%	1.5%	1.6%	1.5%	0.9%	1.0%	-9.1%
Dividend Growth		-	1.9%	1.8%	1.8%	9.2%	23.7%	115.7%
Dividend Coverage		3.2x	1.3x	1.5x	2.7x	3.0x	2.9x	-2.4%

VALUATION & PROFITABILITY HISTORY

Date →		TTM	1 Yr Ago	2 Yrs. Ago	3 Yrs. Ago	4 Yrs. Ago
Price / Earnings		39.5	30.0	46.6	54.8	29.4
Price / Cash Flow		21.1	15.2	17.7	15.0	11.0
Price / Book		8.4	6.1	5.7	5.3	4.9
Price / Tangible B…		12.3	9.4	9.3	8.1	7.5
Price / Sales		1.1	0.8	0.7	0.8	0.7
EV / EBITDA		19.4	14.9	15.4	15.1	13.2
Forward Dividend…		1.0%	4.1%	1.5%	1.4%	1.6%
Shareholder Yield		1.6%	4.7%	3.9%	3.7%	2.2%
Gross Margin		24.9%	24.4%	24.1%	25.1%	24.8%
Net Margin		2.9%	2.4%	1.9%	2.4%	2.4%
Return on Assets		7.6%	6.3%	4.8%	5.5%	5.5%
Return on Equity		21.4%	18.5%	15.2%	16.4%	16.7%
ROIC		14.3%	12.2%	9.4%	10.6%	10.3%

WARNINGS

Name	Severity	Details
Downward EPS Revisions	Low	Net EPS Rev. Cur. Qtr.: -15

Analyst estimates for the next quarter have been revised down. Check for recent news stories about why the future outlook is darker.

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