

Equity Analyst Report Guide

1 The Morningstar RatingSM for stocks is calculated by comparing a stock's current market price with Morningstar's fair value estimate of the stock, culminating in our star rating. Ratings are updated daily and can therefore change daily.

2 The "Fair Value Estimate" is a Morningstar analyst's estimate of what a stock is worth, calculated by determining how much we would pay today for all the streams of excess cash generated by the company in the future. We arrive at this value by forecasting a company's future financial performance using a detailed discounted cash-flow model. This differs from the "Quantitative Fair Value Estimate," which quantitatively calculates the fair value, based on the analyst-driven ratings of comparable companies. Empirically, we find quantitative ratings and analyst-driven ratings to be equally powerful predictors of future performance. When the analyst-driven rating and the quantitative rating agree, we find the ratings to be much more predictive than when they differ. In this way, they provide an excellent second opinion for each other. When the ratings differ, it may be wise to follow the analyst's rating for a truly unique company with its own special situation, and follow the quantitative rating when a company has several reasonable comparable companies and relevant information is flowing at a rapid pace.

3 The "Price/Fair Value" ratio is calculated by dividing the last price by the "Fair Value Estimate." It indicates whether a stock is currently overvalued, undervalued, or fairly valued, according to the fair value estimate. A price/fair value ratio of less than 1 indicates the stock is undervalued, while a price/fair value ratio of more than 1 indicates a stock is overvalued.

4 Our corporate "Stewardship" rating represents our assessment of management's stewardship of shareholder capital, with particular emphasis on capital allocation decisions. Analysts assign one of three stewardship ratings: exemplary, standard, or poor. Most companies will receive a standard rating, and this should be considered the default rating in the absence of evidence that a management team has made exceptionally strong or poor capital allocation decisions.

5 The Morningstar Economic Moat Rating refers to how likely a company is to keep competitors at bay for an extended period. We classify companies as No-Moat, Narrow-Moat, and Wide-Moat.

6 The "Uncertainty Rating" describes our level of uncertainty about the accuracy of our fair value estimate. The lower the uncertainty, the narrower the potential range of outcomes for that particular company. The rating is expressed as low, medium, high, very high, or extreme.

Morningstar Equity Analyst Report | Standard & Poor's 500 Index | 11/11/2023

Apple Inc. AAPL (NASDAQ)

Market Cap: \$302.22 USD (Market) | P/E Ratio: 27.00 (Market) | P/B Ratio: 11.12 | Dividend Yield: 1.20% (Market) | Beta: 1.20 (Market) | Industry: Consumer Electronics | Analyst: Standard

Morningstar Rating	Score	Uncertainty
★★★★	4.5	Low
★★★★	4.5	Low
★★★★	4.5	Low

Investment Thesis

Apple is driving software and services innovation to capture premium pricing on hardware.

Key Risks: The iPhone cycle is a key driver of revenue and profit. The company's reliance on the iPhone cycle is a key driver of revenue and profit. The company's reliance on the iPhone cycle is a key driver of revenue and profit.

1 **Moat Rating**

Corporate credit rating is based on a review of financial health, liquidity, and other factors.

Apple's iPhone and services revenue have consistently been the largest contributors to the company's revenue. The company's reliance on the iPhone cycle is a key driver of revenue and profit. The company's reliance on the iPhone cycle is a key driver of revenue and profit.

The stock is undervalued, and we believe the company has a strong growth potential. The company's reliance on the iPhone cycle is a key driver of revenue and profit. The company's reliance on the iPhone cycle is a key driver of revenue and profit.

2 **Analyst Note**

Apple reported solid third-quarter earnings and growth in both revenue and profit. The company's reliance on the iPhone cycle is a key driver of revenue and profit. The company's reliance on the iPhone cycle is a key driver of revenue and profit.

Apple's revenue growth was driven by strong performance in services and software. The company's reliance on the iPhone cycle is a key driver of revenue and profit. The company's reliance on the iPhone cycle is a key driver of revenue and profit.

3 **Price/Fair Value**

Apple's stock is currently undervalued, and we believe the company has a strong growth potential. The company's reliance on the iPhone cycle is a key driver of revenue and profit. The company's reliance on the iPhone cycle is a key driver of revenue and profit.

4 **Stewardship**

Apple's management has demonstrated a strong commitment to shareholder capital. The company's reliance on the iPhone cycle is a key driver of revenue and profit. The company's reliance on the iPhone cycle is a key driver of revenue and profit.

5 **Economic Moat**

Apple's economic moat is wide, and we believe the company has a strong growth potential. The company's reliance on the iPhone cycle is a key driver of revenue and profit. The company's reliance on the iPhone cycle is a key driver of revenue and profit.

6 **Uncertainty**

Apple's fair value estimate is based on a review of financial health, liquidity, and other factors. The company's reliance on the iPhone cycle is a key driver of revenue and profit. The company's reliance on the iPhone cycle is a key driver of revenue and profit.

7 Corporate Credit Rating: The analyst financial health grade consists of two components that are weighted to arrive at an overall financial health grade:

- 1. Raw financial health:** We look at financial leverage (assets/equity) from the most recent quarter's balance sheet, cash on the balance sheet, cash flows, and free cash flows to arrive at a financial health grade.
- 2. Demand:** We punish companies with deteriorating financial health.

8 The "Bull's Eye" section gives reasons the stock might perform well in the near future.

9 The "Bear's Eye" section explains possible challenges for the company or its sector in the near future.

10 The "Investment Thesis" is Morningstar's opinion on the stock's potential for growth. This section cites specific reasons why the analyst believed the stock is or is not a good investment.

11 Under "Analyst Note," the Morningstar analyst covering the stock summarizes the recent performance and makes an educated guess about its potential future performance.

12 This section states whether we believe the stock has a moat, and why.

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Victor M. Corman



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Table of Contents Equity Analyst Guide To

1. Understanding the eBook Equity Analyst Guide To
 - The Rise of Digital Reading Equity Analyst Guide To
 - Advantages of eBooks Over Traditional Books
2. Identifying Equity Analyst Guide To
 - Exploring Different Genres
 - Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an Equity Analyst Guide To
 - User-Friendly Interface
4. Exploring eBook Recommendations from Equity Analyst Guide To
 - Personalized Recommendations

- Equity Analyst Guide To User Reviews and Ratings
- Equity Analyst Guide To and Bestseller Lists
- 5. Accessing Equity Analyst Guide To Free and Paid eBooks
 - Equity Analyst Guide To Public Domain eBooks
 - Equity Analyst Guide To eBook Subscription Services
 - Equity Analyst Guide To Budget-Friendly Options
- 6. Navigating Equity Analyst Guide To eBook Formats
 - ePub, PDF, MOBI, and More
 - Equity Analyst Guide To Compatibility with Devices
 - Equity Analyst Guide To Enhanced eBook Features
- 7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of Equity Analyst Guide To
 - Highlighting and Note-Taking Equity Analyst Guide To
 - Interactive Elements Equity Analyst Guide To
- 8. Staying Engaged with Equity Analyst Guide To
 - Joining Online Reading Communities
 - Participating in Virtual Book Clubs
 - Following Authors and Publishers Equity Analyst Guide To
- 9. Balancing eBooks and Physical Books Equity Analyst Guide To
 - Benefits of a Digital Library
 - Creating a Diverse Reading Collection Equity Analyst Guide To
- 10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
- 11. Cultivating a Reading Routine Equity Analyst Guide To
 - Setting Reading Goals Equity Analyst Guide To
 - Carving Out Dedicated Reading Time
- 12. Sourcing Reliable Information of Equity Analyst Guide To
 - Fact-Checking eBook Content of Equity Analyst Guide To

- Distinguishing Credible Sources
13. Promoting Lifelong Learning
 - Utilizing eBooks for Skill Development
 - Exploring Educational eBooks
 14. Embracing eBook Trends
 - Integration of Multimedia Elements
 - Interactive and Gamified eBooks

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