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## Nutanix Inc (NTNX)

Analyst Notes : New 10-Q & Forecast 3/6/20

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● = marks items on this page that can be overridden

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Select Forecast To View: Neutral (Updated 3/16/2017)

Values in Millions except per share amounts	025	EY 7: 2026	EY 8: 2027	EY 9: 2028	EY 10: 2029	EY 11: 2030	EY 12: 2031	EY 13: 2032	EY 14: 2033
FCF Present Value	3	\$130.03	\$136.21	\$142.68	\$149.46	\$156.57	\$164.00	\$171.80	\$179.96
FCF Cumulative Present Value	4	\$749.08	\$885.29	\$1,027.97	\$1,177.43	\$1,334.00	\$1,498.00	\$1,669.80	\$1,849.76
Terminal Value	57	\$2,937.75	\$3,378.41	\$3,885.18	\$4,467.95	\$5,138.15	\$5,908.87	\$6,795.20	\$7,814.48
Present Value of Terminal Value	14	\$1,528.48	\$1,601.11	\$1,677.19	\$1,756.88	\$1,840.37	\$1,927.82	\$2,019.42	\$2,115.38
Corporate Value	19	\$2,277.56	\$2,486.40	\$2,705.16	\$2,934.32	\$3,174.37	\$3,425.82	\$3,689.22	\$3,965.14
● Excess Cash		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
● Net Assets from Discontinued Operations		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
● Net Deferred Tax Liability		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
● Net Deferred Compensation Assets		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
● Fair Value of Unconsolidated Subsidiary Assets (non-operating)		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
● Fair Value of Total Debt	2)	(\$713.52)	(\$713.52)	(\$713.52)	(\$713.52)	(\$713.52)	(\$713.52)	(\$713.52)	(\$713.52)
● Fair Value of Preferred Capital	9)	(\$0.00)	(\$0.00)	(\$0.00)	(\$0.00)	(\$0.00)	(\$0.00)	(\$0.00)	(\$0.00)
● Fair Value of Minority Interests	9)	(\$0.00)	(\$0.00)	(\$0.00)	(\$0.00)	(\$0.00)	(\$0.00)	(\$0.00)	(\$0.00)
● Value of Outstanding ESO After-Tax	3)	(\$97.25)	(\$97.25)	(\$97.25)	(\$97.25)	(\$97.25)	(\$97.25)	(\$97.25)	(\$97.25)
● Pensions Net Funded Status		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Shareholder Value	42	\$1,466.79	\$1,675.63	\$1,894.39	\$2,123.55	\$2,363.60	\$2,615.06	\$2,878.46	\$3,154.38
● Shares Outstanding		194.7	194.7	194.7	194.7	194.7	194.7	194.7	194.7
Shareholder Value per Share		\$7.54	\$8.61	\$9.73	\$10.91	\$12.14	\$13.43	\$14.79	\$16.21
GAP (Growth Appreciation Period)		7	8	9	10	11	12	13	14
Maximum Loss Exposure from Special Purpose Entities		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Decision Page pulls Performance Hurdles values from below for the relevant GAPs</b>									
Total Operating Revenue CAGR	5	17.9%	17.5%	17.2%	17.0%	16.8%	16.7%	16.5%	16.4%
Average Economic Earnings Margin		1.5%	2.6%	3.9%	5.2%	6.7%	8.4%	10.2%	12.2%
Average ROIC	5	12.0%	13.2%	14.4%	15.8%	17.3%	18.9%	20.8%	22.8%
ROIC (Return On Invested Capital)	5	18.5%	21.2%	24.4%	28.1%	32.3%	37.1%	42.7%	49.1%
● WACC (Weighted Average Cost of Capital)		9.8%	9.8%	9.8%	9.8%	9.8%	9.8%	9.8%	9.8%
Incremental Return on Invested Capital		-%	-%	-%	-%	-%	-%	-%	-%
Average NOPAT Margin		6.4%	6.4%	6.4%	6.4%	6.4%	6.4%	6.4%	6.4%
Average Avg Invested Capital Turns		1.88	2.06	2.25	2.47	2.70	2.96	3.25	3.56
NOPAT CAGR		-	-	-	-	-	-	-	-
Invested Capital CAGR		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
FCF CAGR		-	-	-	-	-	-	-	-
Economic Earnings CAGR		-	-	-	-	-	-	-	-