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Decision Forecast Overrides DCF Review WACC Review

Teradata Corporation (TDC)

Analyst Notes : Most Dangerous Stocks Model Portfolio Dec 2019

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● = marks items on this page that can be overridden
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Values in Millions except per share amounts	: 2023	EY 6: 2024	EY 7: 2025	EY 8: 2026	EY 9: 2027	EY 10: 2028	EY 11: 2029	EY 12: 2030	EY 13: 2031
FCF Present Value	17.38	$116.57	$115.76	$114.96	$114.17	$113.38	$112.59	$111.82	$111.04
FCF Cumulative Present Value	01.45	$718.02	$833.78	$948.74	$1,062.90	$1,176.28	$1,288.87	$1,400.69	$1,511.73
Terminal Value	607.54	$2,758.78	$2,918.79	$3,088.08	$3,267.19	$3,456.68	$3,657.17	$3,869.29	$4,093.70
Present Value of Terminal Value	899.96	$1,886.84	$1,873.80	$1,860.85	$1,847.99	$1,835.22	$1,822.54	$1,809.95	$1,797.44
Corporate Value	501.41	$2,604.85	$2,707.57	$2,809.59	$2,910.89	$3,011.50	$3,111.41	$3,210.64	$3,309.17
● Excess Cash	28.35	$428.35	$428.35	$428.35	$428.35	$428.35	$428.35	$428.35	$428.35
● Net Assets from Discontinued Operations	0.00	$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	$0.00
● Net Deferred Compensation Assets	0.00	$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	$0.00
● Fair Value of Total Debt	57.79)	($657.79)	($657.79)	($657.79)	($657.79)	($657.79)	($657.79)	($657.79)	($657.79)
● Fair Value of Preferred Capital	0.00)	($0.00)	($0.00)	($0.00)	($0.00)	($0.00)	($0.00)	($0.00)	($0.00)
● Fair Value of Minority Interests	0.00)	($0.00)	($0.00)	($0.00)	($0.00)	($0.00)	($0.00)	($0.00)	($0.00)
● Value of Outstanding ESO After-Tax	11.03)	($11.03)	($11.03)	($11.03)	($11.03)	($11.03)	($11.03)	($11.03)	($11.03)
● Pensions Net Funded Status	18.00)	($118.00)	($118.00)	($118.00)	($118.00)	($118.00)	($118.00)	($118.00)	($118.00)
Shareholder Value	142.94	$2,246.38	$2,349.10	$2,451.11	$2,552.42	$2,653.03	$2,752.94	$2,852.16	$2,950.70
● Shares Outstanding	12.5	112.5	112.5	112.5	112.5	112.5	112.5	112.5	112.5
Shareholder Value per Share	19.05	$19.97	$20.88	$21.79	$22.69	$23.58	$24.47	$25.35	$26.23
GAP (Growth Appreciation Period)	5	6	7	8	9	10	11	12	13
Maximum Loss Exposure from Special Purpose Entities	0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Decision Page pulls Performance Hurdles values from below for the relevant GAPs									
Total Operating Revenue CAGR	.7%	1.5%	2.1%	2.6%	2.9%	3.2%	3.4%	3.6%	3.8%
Average Economic Earnings Margin	.3%	3.6%	3.9%	4.2%	4.5%	4.9%	5.2%	5.6%	6.0%
Average ROIC	0.1%	10.4%	10.7%	11.0%	11.3%	11.7%	12.0%	12.4%	12.8%
ROIC (Return On Invested Capital)	1.1%	11.8%	12.5%	13.2%	14.0%	14.8%	15.6%	16.5%	17.5%
● WACC (Weighted Average Cost of Capital)	.5%	6.5%	6.5%	6.5%	6.5%	6.5%	6.5%	6.5%	6.5%
Incremental Return on Invested Capital	-%	-%	-%	-%	-%	-%	-%	-%	-%
Average NOPAT Margin	.2%	7.2%	7.2%	7.2%	7.2%	7.2%	7.2%	7.2%	7.2%
Average Avg Invested Capital Turns	1.40	1.44	1.48	1.53	1.57	1.62	1.67	1.72	1.78
NOPAT CAGR	1.5%	21.2%	18.9%	17.1%	15.8%	14.8%	13.9%	13.2%	12.6%
Invested Capital CAGR	.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
FCF CAGR	5.5%	14.6%	13.3%	12.3%	11.6%	11.0%	10.5%	10.1%	9.8%
Economic Earnings CAGR	-	-	-	-	-	-	-	-	-