

Decision Forecast Overrides DCF Review WACC Review

Teradata Corporation (TDC)

Analyst Notes: Most Dangerous Stocks Model Portfolio Dec 2019

Overrides are currently inactive. To review overrides click on the Overrides edit page .

— marks items on this page that can be overridden

— marks items on this page that have active overrides in effect

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Values in Millions except per share amounts 20	EY 3: 2021	EY 4: 2022	EY 5: 2023	EY 6: 2024	EY 7: 2025	EY 8: 2026	EY 9: 2027	EY 10: 2028
FCF (Free Cash Flow)	\$119.93	\$125.92	\$131.46	\$136.07	\$140.83	\$145.76	\$150.86	\$156.14
FCF Present Value	\$99.18	\$97.75	\$95.79	\$93.06	\$90.41	\$87.83	\$85.33	\$82.90
FCF Cumulative Present Value	\$304.90	\$402.65	\$498.44	\$591.50	\$681.91	\$769.74	\$855.07	\$937.96
Terminal Value	\$1,926.56	\$2,011.33	\$2,081.72	\$2,154.58	\$2,229.99	\$2,308.04	\$2,388.83	\$2,472.43
Present Value of Terminal Value	\$1,593.28	\$1,561.33	\$1,516.83	\$1,473.60	\$1,431.61	\$1,390.81	\$1,351.17	\$1,312.66
Corporate Value	\$1,898.17	\$1,963.98	\$2,015.27	\$2,065.10	\$2,113.51	\$2,160.55	\$2,206.24	\$2,250.63
Excess Cash	\$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
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	(\$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)
Fair Value of Minority Interests	(\$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)
Pensions Net Funded Status	(\$118.00)	(\$118.00)	(\$118.00)	(\$118.00)	(\$118.00)	(\$118.00)	(\$118.00)	(\$118.00)
Shareholder Value	\$1,539.70	\$1,605.51	\$1,656.80	\$1,706.63	\$1,755.04	\$1,802.08	\$1,847.77	\$1,892.16
Shares Outstanding	112.5	112.5	112.5	112.5	112.5	112.5	112.5	112.5
Shareholder Value per Share	\$13.69	\$14.27	\$14.73	\$15.17	\$15.60	\$16.02	\$16.42	\$16.82
GAP (Growth Appreciation Period)	3	4	5	6	7	8	9	10
Maximum Loss Exposure from Special Purpose Entities	\$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	(2.6%)	(0.8%)	0.2%	0.8%	1.2%	1.5%	1.7%	1.9%
Average Economic Earnings Margin	1.2%	1.4%	1.6%	1.8%	1.9%	2.1%	2.3%	2.4%
Average ROIC	8.0%	8.2%	8.3%	8.5%	8.7%	8.9%	9.0%	9.2%
ROIC (Return On Invested Capital)	8.3%	8.7%	9.1%	9.4%	9.7%	10.1%	10.4%	10.8%
WACC (Weighted Average Cost of Capital)	6.5%	6.5%	6.5%	6.5%	6.5%	6.5%	6.5%	6.5%
Incremental Return on Invested Capital	-%	-%	-%	-%	-%	-%	-%	-%
Average NOPAT Margin	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%	6.0%
Average Avg Invested Capital Turns	1.33	1.36	1.39	1.42	1.45	1.48	1.51	1.54
NOPAT CAGR	30.6%	23.7%	19.6%	16.7%	14.7%	13.3%	12.1%	11.2%
Invested Capital CAGR	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
FCF CAGR	16.9%	13.8%	11.8%	10.4%	9.4%	8.6%	8.0%	7.6%
Economic Earnings CAGR	-	-		-	-		-	