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Decision Forecast Overrides DCF Drivers DCF Review WACC Review

## C.H. Robinson Worldwide Inc (CHRW)

Analyst Notes : Most Attractive Stocks Model Portfolio Jan 2020

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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Select Forecast To View: Optimistic (Updated 1/16/2020)

| Values in Millions except per share amounts | Y 2: 2020 | 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 Present Value | $497.00 | $494.71 | $492.43 | $490.17 | $487.91 | $485.67 | $483.43 | $481.21 | $479.00 |
| FCF Cumulative Present Value | $996.29 | $1,491.00 | $1,983.44 | $2,473.61 | $2,961.52 | $3,447.19 | $3,930.62 | $4,411.83 | $4,890.83 |
| Terminal Value | $13,761.38 | $14,449.45 | $15,171.92 | $15,930.52 | $16,727.04 | $17,563.40 | $18,441.57 | $19,363.65 | $20,331.83 |
| Present Value of Terminal Value | $12,367.38 | $12,310.48 | $12,253.84 | $12,197.46 | $12,141.34 | $12,085.48 | $12,029.87 | $11,974.52 | $11,919.43 |
| Corporate Value | $13,363.68 | $13,801.48 | $14,237.28 | $14,671.07 | $15,102.86 | $15,532.67 | $15,960.49 | $16,386.35 | $16,810.26 |
| Excess Cash | $0.00 | $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 | $0.00 |
| Net Deferred Tax Liability | ($25.64) | ($25.64) | ($25.64) | ($25.64) | ($25.64) | ($25.64) | ($25.64) | ($25.64) | ($25.64) |
| 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 | ($1,467.54) | ($1,467.54) | ($1,467.54) | ($1,467.54) | ($1,467.54) | ($1,467.54) | ($1,467.54) | ($1,467.54) | ($1,467.54) |
| 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 | ($127.66) | ($127.66) | ($127.66) | ($127.66) | ($127.66) | ($127.66) | ($127.66) | ($127.66) | ($127.66) |
| Pensions Net Funded Status | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 | $0.00 |
| Shareholder Value | $11,742.84 | $12,180.64 | $12,616.44 | $13,050.23 | $13,482.02 | $13,911.83 | $14,339.65 | $14,765.52 | $15,189.42 |
| Shares Outstanding | 135.3 | 135.3 | 135.3 | 135.3 | 135.3 | 135.3 | 135.3 | 135.3 | 135.3 |
| Shareholder Value per Share | $86.82 | $90.06 | $93.28 | $96.49 | $99.68 | $102.86 | $106.02 | $109.17 | $112.31 |
| GAP (Growth Appreciation Period) | 2 | 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 | $0.00 |
| **Decision Page pulls Performance Hurdles values from below for the relevant GAPs** | | | | | | | | | |
| Total Operating Revenue CAGR | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% |
| Average Economic Earnings Margin | 14.0% | 14.1% | 14.1% | 14.1% | 14.1% | 14.1% | 14.1% | 14.2% | 14.2% |
| Average ROIC | 19.8% | 19.9% | 19.9% | 19.9% | 19.9% | 19.9% | 19.9% | 20.0% | 20.0% |
| ROIC (Return On Invested Capital) | 19.9% | 19.9% | 19.9% | 20.0% | 20.0% | 20.0% | 20.1% | 20.1% | 20.1% |
| WACC (Weighted Average Cost of Capital) | 5.5% | 5.5% | 5.5% | 5.5% | 5.5% | 5.5% | 5.5% | 5.5% | 5.5% |
| Incremental Return on Invested Capital | 21.7% | 21.7% | 21.7% | 21.7% | 21.7% | 21.7% | 21.7% | 21.7% | 21.7% |
| Average NOPAT Margin | 3.9% | 3.9% | 3.9% | 3.9% | 3.9% | 3.9% | 3.9% | 3.9% | 3.9% |
| Average Avg Invested Capital Turns | 5.06 | 5.07 | 5.07 | 5.07 | 5.08 | 5.08 | 5.09 | 5.09 | 5.09 |
| NOPAT CAGR | 4.7% | 4.8% | 4.9% | 4.9% | 4.9% | 4.9% | 4.9% | 4.9% | 4.9% |
| Invested Capital CAGR | 4.8% | 4.8% | 4.8% | 4.8% | 4.8% | 4.8% | 4.8% | 4.8% | 4.8% |
| FCF CAGR | (2.4%) | (0.0%) | 1.2% | 2.0% | 2.5% | 2.8% | 3.1% | 3.3% | 3.5% |
| Economic Earnings CAGR | 4.9% | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% | 5.0% |