

NVIDIA Corporation

NASDAQ / NVDA / US67066G1040

Company Profile

Business Summary



NVIDIA Corporation is the world leader in the design, development, and marketing of programmable graphics processors. The group also develops associated software. Net sales break down by family of products as follows:

- computing and networking solutions (77.8%): data center platforms and infrastructure, Ethernet interconnect solutions, high-performance computing solutions, platforms and solutions for autonomous and intelligent vehicles, solutions for enterprise artificial intelligence infrastructure, crypto-currency mining processors, embedded computer boards for robotics, teaching, learning and artificial intelligence development, etc.;

- graphics processors (22.2%): for PCs, game consoles, video game streaming platforms, workstations, etc. (GeForce, NVIDIA RTX, Quadro brands, etc.). The group also offers laptops, desktops, gaming computers, computer peripherals (monitors, mice, joysticks, remote controls, etc.), software for visual and virtual computing, platforms for automotive infotainment systems and cloud collaboration platforms.

Net sales break down by industry between data storage (78%), gaming (17.1%), professional visualization (2.5%), automotive (1.8%) and other (0.6%).

Net sales are distributed geographically as follows: the United States (44.3%), Taiwan (22%), China (16.9%) and other (16.8%).

Valuation

Capitalization	2,824B	P/E ratio 2026 *	26.7x	P/E ratio 2027 *	20.9x
Enterprise value	2,720B	EV / Sales 2026 *	13.3x	EV / Sales 2027 *	10.4x
Free-Float	95.7%	Yield 2026 *	0.03%	Yield 2027 *	0.04%

* Estimated data

Sales per Business

USD in Million	2024	Weight	2025	Weight	Delta
Compute & Networking	47,405	77.8 %	116,193	89 %	+145.11%
Graphics	13,517	22.2 %	14,304	11 %	+5.82%

Sales per region

USD in Million	2024	Weight	2025	Weight	Delta
United States	26,966	100 %	61,257	46.9 %	+127.16%
Singapore	-	-	23,684	18.1 %	-
Taiwan	-	-	20,573	15.8 %	-
China (Including Hong Kong)	-	-	17,108	13.1 %	-
Other	-	-	7,875	6 %	-

Share class

	Vote	Quantity	Free-Float	Company-owned shares	Total Float
Stock A	1	24,490,000,000	23,436,714,859 (95.7 %)	0	95.7 %

Upcoming events

2025-03-18 01:00 pm	GTC AI Conference - Keynote
2025-03-19 11:30 am	Analyst Meeting

Past Events

2025-03-11	Détachement de
2025-03-05 03:20 pm	Morgan Stanley Technology, Media & Telecom Conference

Financials

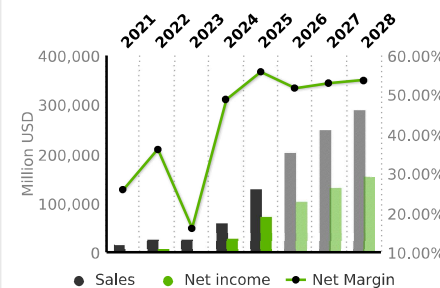
	2026 *	2027 *
Net sales	204B	250B
Net income	105B	133B
Net Debt	-104B	-210B

* Estimated data

Sector

- Technology
 - Technology Equipment
 - Semiconductors & Semiconductor Equipment
 - Semiconductors
 - Other Semiconductors

Income Statement Evolution



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Managers

Managers	Title
Jensen Huang	Founder
Colette Kress	Director of Finance/CFO
Debora Shoquist	Chief Operating Officer
William Dally	Chief Tech/Sci/R&D Officer
Tony Tamasi	Chief Tech/Sci/R&D Officer

Members of the board

Members of the board	Title
Jensen Huang	Founder
Harvey Jones	Director/Board Member
Tench Coxe	Director/Board Member
Brooke Seawell	Director/Board Member
Mark Stevens	Director/Board Member

Shareholders

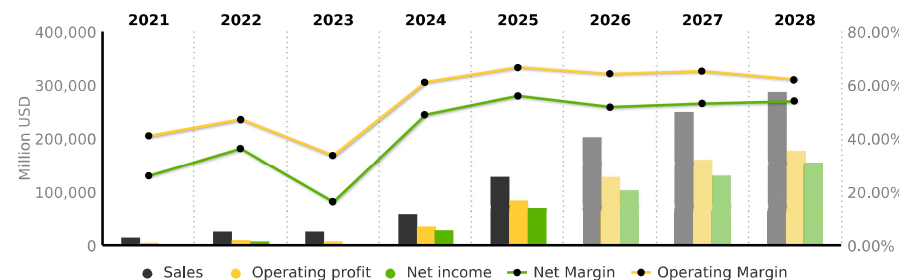
Name	Equities	%
Vanguard Fiduciary Trust Co.	2,179,410,685	8.932%
BlackRock Advisors LLC	1,432,710,639	5.872%
Fidelity Management & Research Co. LLC	1,003,723,150	4.114%
State Street Corp.	967,850,472	3.967%
Jensen Huang	860,280,399	3.526%

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Financials and Forecast

Income Statement Evolution



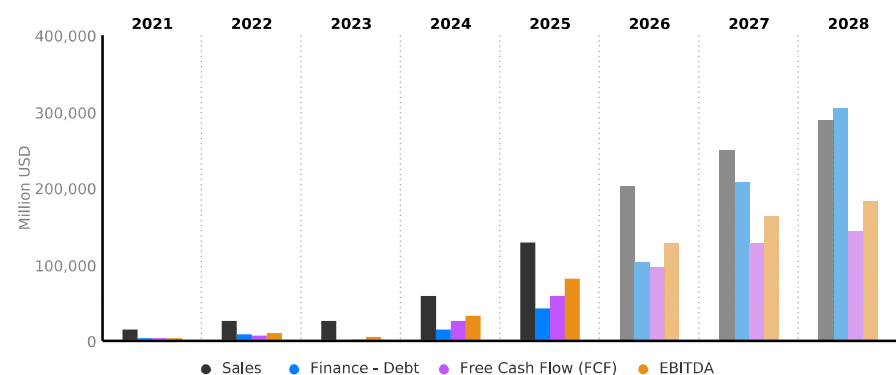
Fiscal Period: January

	2023	2024	2025	2026	2027	2028
Net sales ¹	26 974	60 922	130 497	203 980	250 371	289 393
Change	-	-	-	-	-	-
EBITDA ¹	5 768	34 480	83 317	130 271	163 977	186 123
Change	-	-	-	-	-	-
EBIT ¹	9 040	37 134	86 789	130 641	162 839	179 412
Change	-	-	-	-	-	-
Interest Paid ¹	-262	-257	-257	-239	-233	-166
Earnings before Tax (EBT) ¹	4 181	33 818	84 026	123 606	151 781	183 785
Change	-	-	-	-	-	-
Net income ¹	4 368	29 760	72 880	105 447	132 608	155 662
Change	-	-	-	-	-	-
Announcement Date	22/02/23	21/02/24	26/02/25	-	-	-

¹USD in Million

Estimates

Balance Sheet Analysis

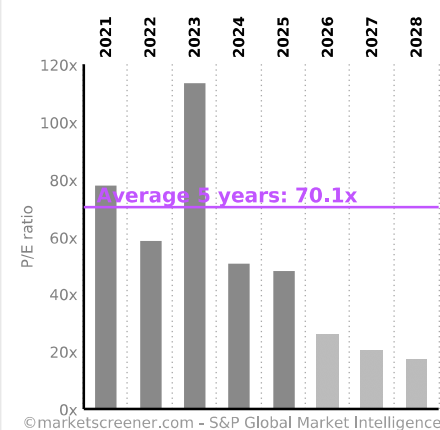


Financial Ratios

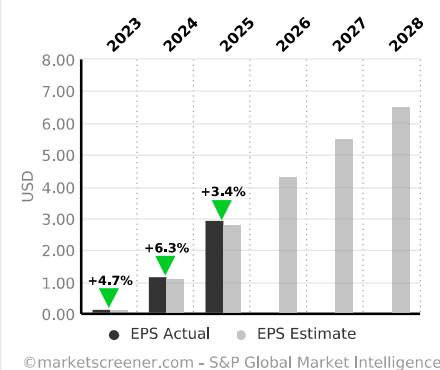
Size	2026*	2027*
Capitalization (USD)	2,824B	-
Enterprise Value (EV) (USD)	2,720B	2,614B
Valuation	2026*	2027*
P/E ratio	26,7x	20,9x
Capitalization / Revenue	13,8x	11,3x
EV / Revenue	13,3x	10,4x
EV / EBITDA	20,9x	15,9x
Yield	0,03%	0,04%
Price to Book	17,7x	10,7x
Profitability	2026*	2027*
Operating Margin		
Net margin		
ROA (Net income/ Total Assets)	69,4%	57,2%
ROE (net income / shareholders' equity)	95.99973	69.21538
Rate of Dividend	-	-

* Estimated data

Price Earning Ratio



Annual profits - Rate of surprise



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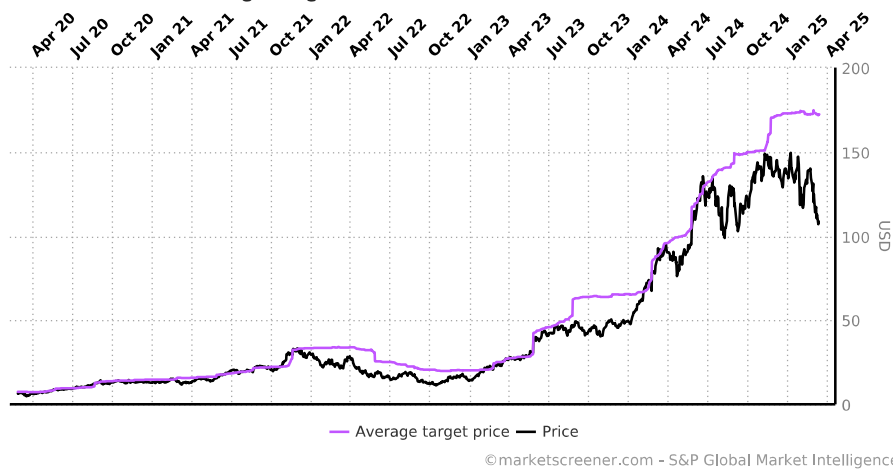
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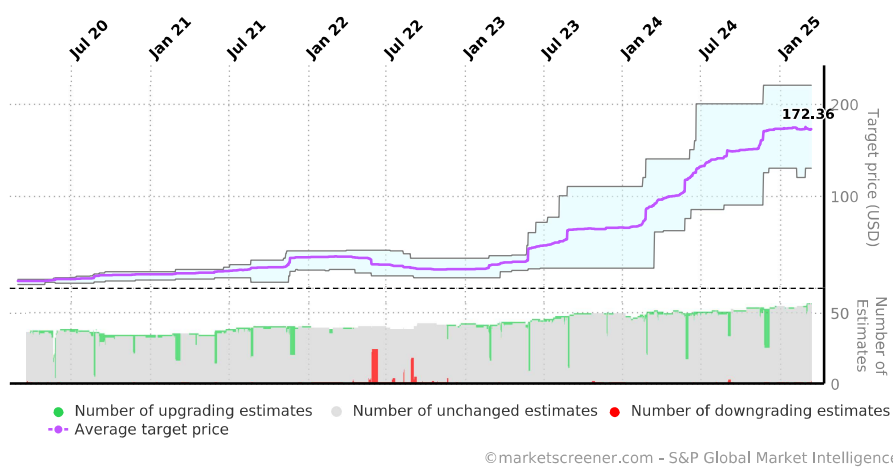
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Analysts' Consensus

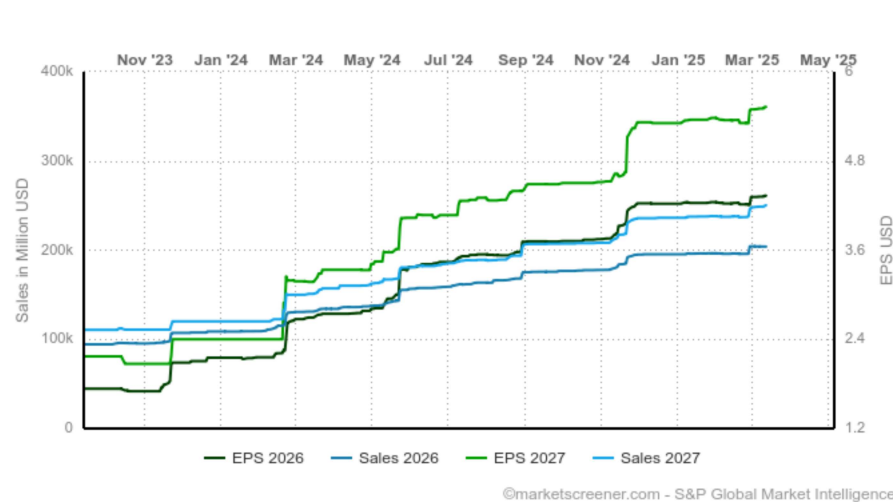
Evolution of the average Target Price



Target Price consensus evolution



Revenue Revisions & EPS Revisions



Consensus

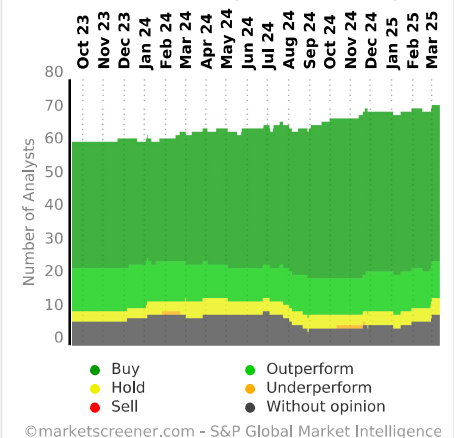
Self	Buy
Mean consensus	BUY
Number of Analysts	63
Last Close Price	115.74 USD
Average target price	172.36 USD
Spread / Average Target	+48.92%
High Price Target	220.00 USD
Spread / Highest target	+90.08%
Low Price Target	130.00 USD
Spread / Lowest Target	+12.32%

Consensus detail

BUY	47
OUTPERFORM	11
HOLD	5
UNDERPERFORM	0
SELL	0
Without OPINION	9

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Consensus revision (last 18 months)

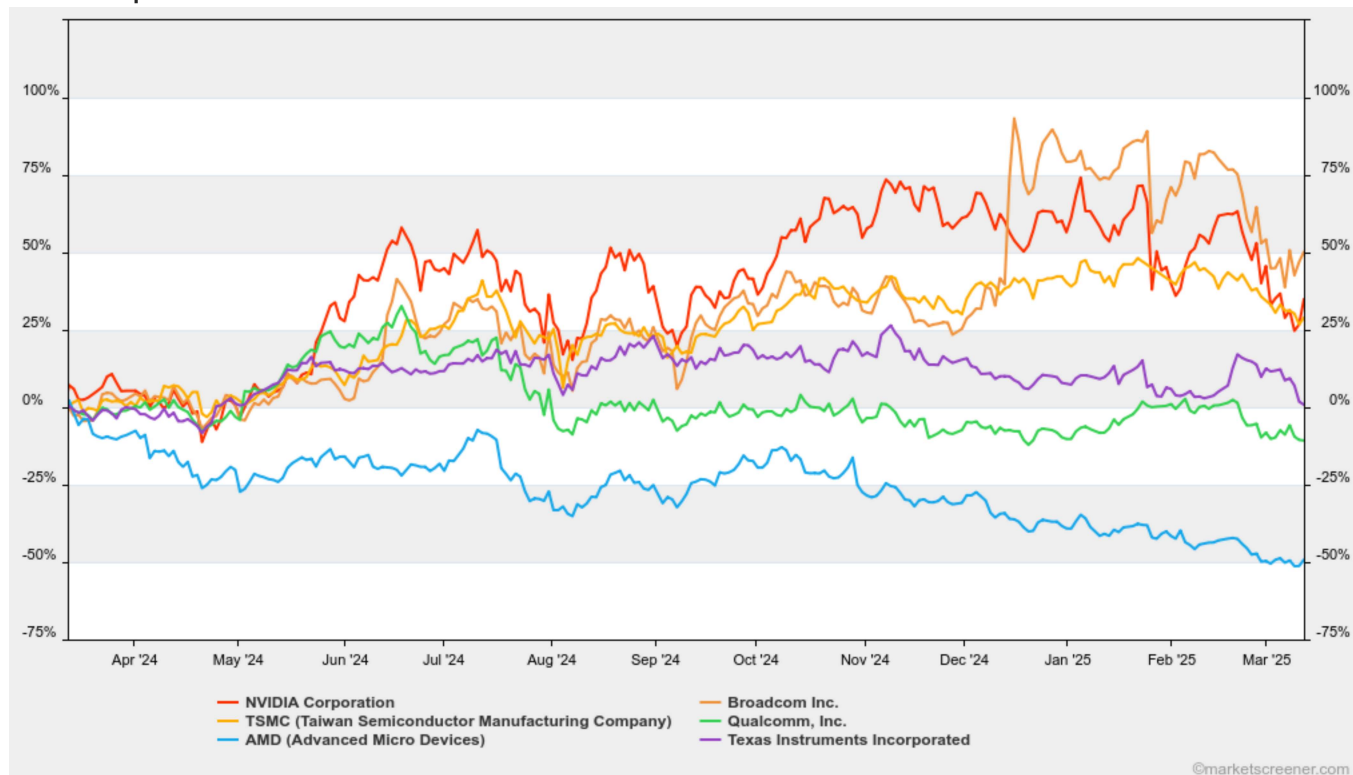


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Sector and Competitors

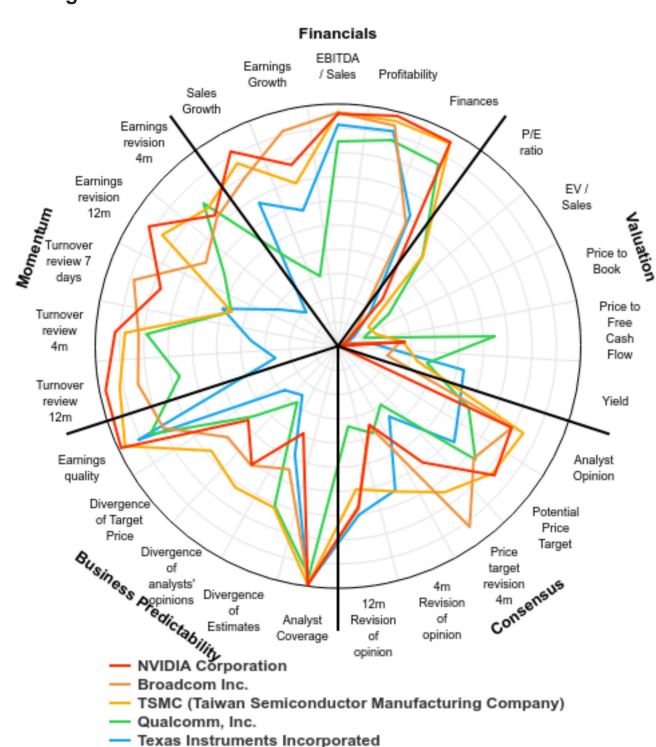
Sector Comparison



Sector: Semiconductors

	1st Jan change	Capi.	Investor	ESG MSCI
NVIDIA CORPORATION	-13.81%	2,824B	★★★★★	AAA
BROADCOM INC.	-16.22%	913B	★★★★★	A
TSMC (TAIWAN SEMICONDUCTOR MANUFACTURING COMPANY)	-8.09%	778B	★★★★★	AAA
QUALCOMM, INC.	-0.53%	169B	★★★★★	A
TEXAS INSTRUMENTS INCO	-6.30%	160B	★★★★★	AAA
AMD (ADVANCED MICRO DEVICES)	-16.56%	163B	★★★★★	AA
ARM HOLDINGS PLC	-8.64%	119B	★★★★★	-
ANALOG DEVICES, INC.	-2.75%	102B	★★★★★	A
MICRON TECHNOLOGY, INC	+13.64%	107B	★★★★★	A
SK HYNIX INC.	+14.38%	94.46B	★★★★★	A
INTEL CORPORATION	+3.14%	89.54B	★★★★★	AAA
SMIC (SEMICONDUCTOR MANUFACTURING COMPANY)	+56.76%	66.79B	★★★★★	-
MARVELL TECHNOLOGY GROUP	-36.76%	60.44B	★★★★★	AA
NXP SEMICONDUCTORS N.V.	-1.64%	51.85B	★★★★★	AAA
INFINEON TECHNOLOGIES AG	+8.77%	49.7B	★★★★★	AAA
MICROCHIP TECHNOLOGY, INC.	-9.50%	27.91B	★★★★★	A
RENESAS ELECTRONICS CORP.	+10.43%	27.77B	★★★★★	AA

Ratings



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Technical Analysis

Daily chart



Technical analysis trends

	S-Term	M-Term	L-Term
Trend	Bearish	Bearish	Bullish
Resistance	124.92	124.92	147.63
Spread/Res.	-7.35%	-7.35%	-21.60%
Spread/Supp.	+8.19%	+8.19%	+10.49%
Support	106.98	106.98	104.75

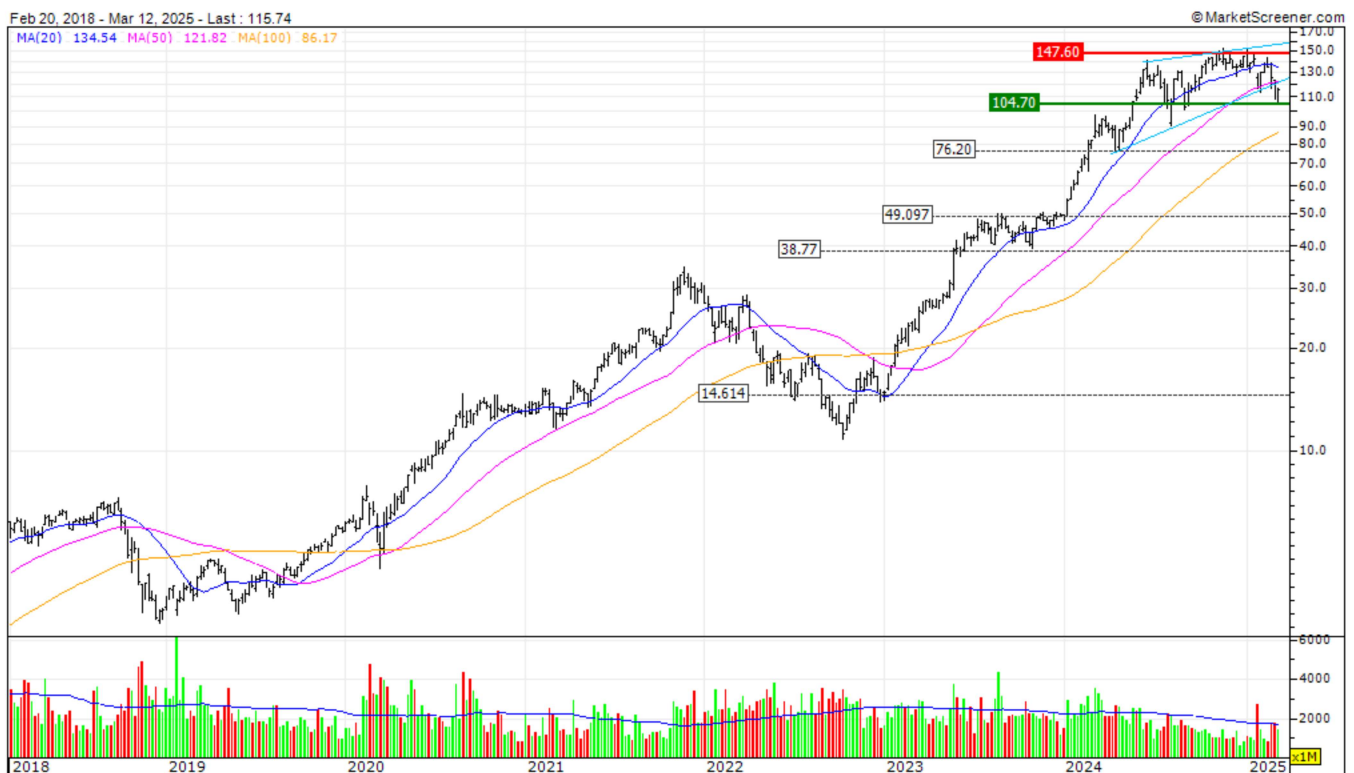
Basic data

Number of securities	24,400,000,000
Capitalization (USD)	2,824,056,000,000
Free-Float	95.7 %

Performance

1 day	+0.35%	<div></div>
1 week	-1.33%	<div></div>
Current month	-7.35%	<div></div>
1 month	-11.74%	<div></div>
3 months	-15.73%	<div></div>
6 months	-2.85%	<div></div>
Current year	-13.81%	<div></div>

Weekly chart



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Summary

Summary

- The company has strong fundamentals. More than 70% of companies have a lower mix of growth, profitability, debt and visibility.
- The company's MSCI ESG score, based on a ranking of the company relative to its industry, comes out particularly well.

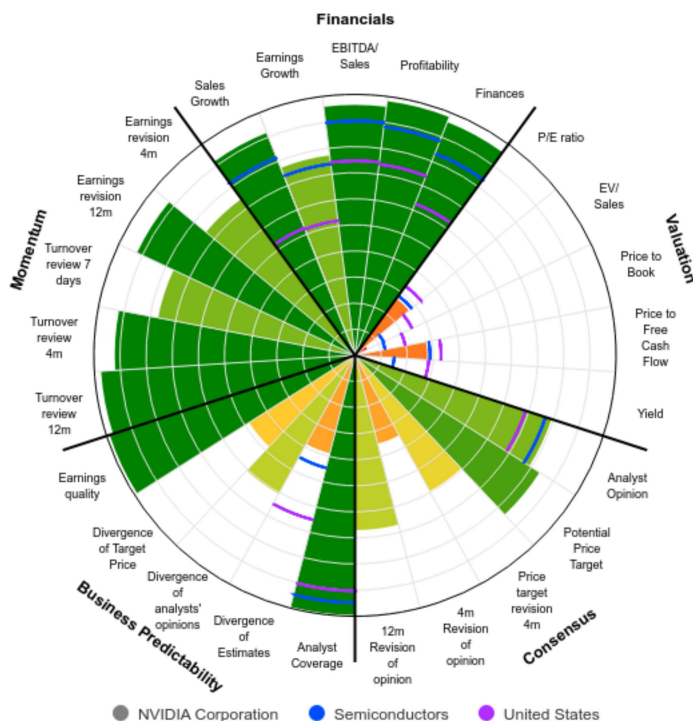
Strengths

- The prospective high growth for the next fiscal years is among the main assets of the company
- The company's earnings per share (EPS) are expected to grow significantly over the next few years according to the consensus of analysts covering the stock.
- The company's EBITDA/Sales ratio is relatively high and results in high margins before depreciation, amortization and taxes.
- The group's activity appears highly profitable thanks to its outperforming net margins.
- Thanks to a sound financial situation, the firm has significant leeway for investment.
- Over the past year, analysts have regularly revised upwards their sales forecast for the company.

Weaknesses

- The firm trades with high earnings multiples: 26.71 times its 2026 earnings per share.
- The company's "enterprise value to sales" ratio is among the highest in the world.
- The company appears highly valued given the size of its balance sheet.
- The company is highly valued given the cash flows generated by its activity.
- The company is not the most generous with respect to shareholders' compensation.

Ratings chart - Surperformance



Investor

Trader

ESG MSCI



AAA

Financials

Sales growth	██████████
EPS Growth	██████████
Profitability	██████████
Net margin	██████████
Financial Health	██████████

Valuation

P/E ratio	██████████
EV/REVENUE	██████████
EV/EBITDA	██████████
PBR	██████████
Yield	██████████

Revisions

1 year Revenue revision	██████████
4 months Revenue revision	██████████
1 months Revenue revision	██████████
1 year EPS revision	██████████
4 months EPS revision	██████████

Consensus

Analysts' recommendations	██████████
4m Revision of opinion	██████████
Potential Price Target	██████████
4m Target Price Revision	██████████
12m Target Price Revision	██████████

Business Predictability

Earnings quality	██████████
Analyst Coverage	██████████
Divergence of analysts' recommendations	██████████
Divergence of Target Price	██████████
Divergence of analysts' opinions	██████████

ESG

ESG: Environment	██████████
ESG: Social	██████████
ESG: Governance	██████████
ESG: Controversy	██████████
ESG: Ethical controversies	██████████
ESG: Human rights controversies	██████████
ESG: Tax subsidies controversies	██████████
ESG: Sharia compliant	██████████