

**STRONG BUY**

12-Month Price Target: **\$226.50** (▲19.3% upside) | Conviction: Low Conviction — Models Diverge

Rev Growth	62.5%	Gross Margin	N/A	Sharpe Ratio	1.69	Max Drawdown	-66.3%
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NVIDIA Corporation (NVDA) has a 12-month price target of \$226.50, implying 19.3% upside from the current price of \$189.82. The company is growing revenue at 62% year-over-year — a standout growth rate that reflects strong demand and market share gains. With a 53% net margin, the business is highly profitable and cash generative. On a DCF basis, the stock appears significantly overvalued. Wall Street's consensus (56 analysts) has a price target of \$253.88 with a STRONG BUY recommendation. Model conviction: Low Conviction — Models Diverge.

Model	Target	Upside	Weight	Confidence
Wall Street Analyst Consensus	\$253.88	+33.8%	0%	100%
DCF Valuation (1-yr convergence)	\$167.30	-11.9%	0%	60%
Monte Carlo (GBM, 10k paths)	\$317.08	+67.0%	0%	32%
Peer P/E Re-rating	\$179.79	-5.3%	0%	55%
Technical Trend Projection	\$198.14	+4.4%	0%	45%
BLENDed TARGET	\$226.50	+19.3%	100%	Low Conviction — Models Diverge

Module	Weight	Score	Bar
Fundamental Analysis	28%	79/100	██
Competitive / Moat	22%	75/100	██
Technical Analysis	17%	62/100	██
News Sentiment	10%	53/100	██
Risk-Adjusted Metrics	8%	40/100	██
Insider / Institutional	7%	56/100	██
Options Flow	5%	76/100	██
Short Interest	3%	50/100	██
COMPOSITE SCORE	100%	76.6/100	

Metric	Value
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P/E Ratio	47.0x
P/B Ratio	38.8x
EV/EBITDA	40.5x
Revenue Growth YoY	62.5%
Earnings Growth YoY	66.7%
ROE	107.4%
Net Margin	53.0%
Debt/Equity	0.09
Current Ratio	4.47
Piotroski F-Score	8/9 — Very Strong (High Quality)

ACCOUNTING QUALITY & FRAUD DETECTION

Test	Score	Assessment
Beneish M-Score	-1.0155	■ MANIPULATOR — High probability of earnings manipulation
Altman Z-Score	91.101	■ SAFE ZONE
Earnings Quality	75/100	■ HIGH QUALITY — Earnings are real and cash-backed

Risk Flags:

- SGI 2.14 — high growth creates manipulation incentive
- TATA 0.079 — high accruals vs cash earnings

COMPETITIVE ANALYSIS & ECONOMIC MOAT

**Moat:** Wide Moat (85/100) | **Position:** Industry Leader | **vs Peers:** Significantly Overvalued vs Peers

- Revenue Growth: Best-in-class (vs peer avg 0.14)
- Gross Margin: Above average (vs peer avg 0.56)
- Net Margin: Best-in-class (vs peer avg 0.21)
- ■ Pb Ratio: Significant premium (vs peer avg 15.08)
- ■ Ev Ebitda: Significant premium (vs peer avg 17.10)
- ■ Earnings Growth: Below average (vs peer avg 1.11)

TECHNICAL ANALYSIS

**Trend (50/200 MA):** ■ Uptrend (SMA50 > SMA200)  
**Price vs SMA20:** ■ Above SMA20 (short-term bullish)  
**MACD:** ■ Bullish (above signal)  
**RSI:** ■ NEUTRAL (54.9)  
**Bollinger Bands:** ■ Mid-band (67% of band width)  
**ADX (Trend Strength):** ■ WEAK/NO TREND (10.3)  
**Volume:** ■ Normal volume (1.1x average)  
**Support:** \$169.54 | **Resistance:** \$212.18

INSIDER TRADING & INSTITUTIONAL OWNERSHIP

■ NEUTRAL — No strong insider signal

Institutions own 69.7% of shares. Insiders own 4.3% of shares.

Institutional: 69.7% | Insider: 4.3%

SHORT INTEREST & OPTIONS SIGNALS

**Short Interest:** ■ LOW SHORT INTEREST — shorts not a significant factor | Float: 1.1% | Days to Cover: 1.61 | Squeeze Score: 6/100

**Options:** P/C Ratio 0.58 (■ Bullish (calls dominating)) | IV Rank -19.1/100

SIMULATIONS & RISK METRICS

**Monte Carlo (1-Year):** Median 67.0% | Bull 223.5% | Bear -13.5% | Prob Profit 84%

**DCF Valuation:** Intrinsic \$88.28 — Significantly Overvalued | MOS 20%: \$70.62

**Risk:** Sharpe 1.69 | Sortino 2.72 | Max DD -66.3% | VaR(95%) -4.80%

MACRO REGIME

**Regime:** Expansion (Risk-On) | GDP growing, inflation moderate. Best time to own growth stocks.

**Sector Fit:** ■ TAILWIND — Technology is a favored sector in Expansion regime

CATALYSTS & RISK FACTORS

Upside Catalysts	Risk Factors
+ Earnings acceleration — strong growth could trigger upward estimate revisions	- Elevated valuation (P/E 47x) — multiple compression risk if growth disappoints
+ Hyper-growth revenue trajectory — potential for multiple expansion	- High beta (2.3x) — amplified downside in market corrections
+ AI infrastructure buildout — secular demand tailwind for multiple years	- Very high volatility (52% annualized) — wide outcome range

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