Analyst Note Example — YFlake (YFK_Analyst_Note_2025-03-31.pdf)

Header:

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Beacon Capital Research (fictional)
March 31, 2025
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Rating & Target: - Current Rating: Hold - Price Target: $43.00 (unchanged) - FY2025 EPS estimate revised from $2.55 to $2.44

Investment Thesis: - Slower enterprise adoption in Europe impacting short-term growth. - Competitive pressure from hyperscale providers is intensifying. - Long-term thesis remains intact due to strong R&D pipeline.

Key Risks: - Macroeconomic slowdown in key European markets. - Pricing pressure from competitors.

Earnings Summary Table: | Quarter | Revenue ($m) | EPS | |———|——————|——| | Q1 2025 | 400 | 0.60| | Q2 2025 | 420 | 0.61|
