



COMPANY OVERVIEW

Nvidia Corporation is a leading American technology company founded in 1993 by Jensen Huang, Chris Malachowsky, and Curtis Priem. Headquartered in Santa Clara, California, the company has evolved from a graphics processing pioneer into a global powerhouse in computing and artificial intelligence. Jensen Huang continues to serve as the company's CEO, guiding its strategic direction and rapid growth. Nvidia is best known for designing high-performance GPUs (Graphics Processing Units), particularly the GeForce and RTX series for gaming, as well as its data centre solutions under the Nvidia A100 and H100 lines. The company also offers AI computing platforms such as Nvidia DGX, and has expanded into autonomous vehicles, robotics, and the Omniverse — a 3D simulation and collaboration platform.

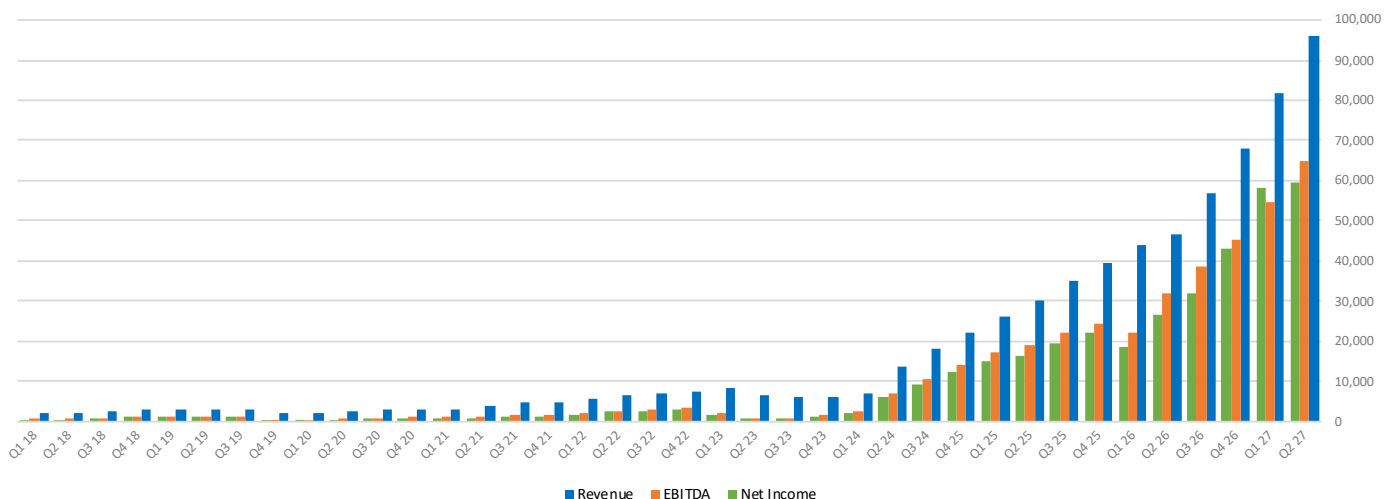
Financial Highlights

Capitalization (mln USD)	5,277,616
Revenue (mln USD)	96,221
EBITDA (mln USD)	64,797
Net Income (mln USD)	59,688
Net Margin	62.03%
EPS Ratio (TTM, USD)	7.94
P/E Ratio (TTM)	27.36
P/S Ratio (TTM)	16.71
D/E Ratio	0.40
EV/EBITDA (TTM)	25.25

Nvidia's revenue increased by 105.9% year-over-year, reaching 96,221 million USD, driven by strong sales growth across all regions. EBITDA rose by 102.9%, reflecting enhanced operational efficiency and cost management. Net income grew by 125.9%, supported by strong revenue growth and controlled expenses. Net Margin expanded from 56.5% to 62.0% year-over-year, reflecting improved profitability.

Financial performance highlights an earnings per share (EPS) of 7.94 USD, marking an improvement over last year's 3.56 USD. The price-to-earnings (P/E) ratio is 26.2, signaling improved valuation metrics year-over-year from 44.6. The price-to-sales (P/S) ratio stands at 16.71, falling below last year's level of 23.62.

Revenue, EBITDA & Net Income Over Time



Risk Assessment

Market Risk

Nvidia operates in highly competitive and fast-evolving markets, where demand for GPUs and AI solutions can fluctuate rapidly. Dependency on sectors such as gaming, data centres, and automotive introduces vulnerability to economic cycles and consumer trends. Additionally, technological disruption or stronger innovation from competitors may erode Nvidia’s market share.

Financial Risk

Despite strong revenue growth, Nvidia is exposed to foreign exchange volatility due to its global operations. Fluctuations in raw material costs and manufacturing expenses can affect profit margins, particularly during supply chain constraints. Any delay or failure in large acquisitions or capital investments could impact the company’s financial stability and investor confidence.

Operational Risk

Nvidia relies on complex global supply chains and third-party manufacturers, which increases exposure to production delays, component shortages, and geopolitical tensions. The company’s success is also tied to continuous innovation and retention of specialised talent in fields such as AI and chip design. System vulnerabilities and cybersecurity threats pose additional risks to data integrity and product reliability.

Regulatory Risk

Nvidia faces increasing scrutiny around data privacy, export controls, and antitrust concerns, particularly in the US, China, and the European Union. Regulatory restrictions on advanced chip exports, especially involving China, could significantly affect revenue and strategic partnerships.

PROFITABILITY & BANKRUPTCY

Piotroski F-Score Analysis

Nvidia achieved a Piotroski F-Score of 6/9, suggesting moderate financial health and operational efficiency. Net income improved by 122.7%, reflecting better profitability, higher long-term debt levels and an improved current ratio contributed to a balanced result.

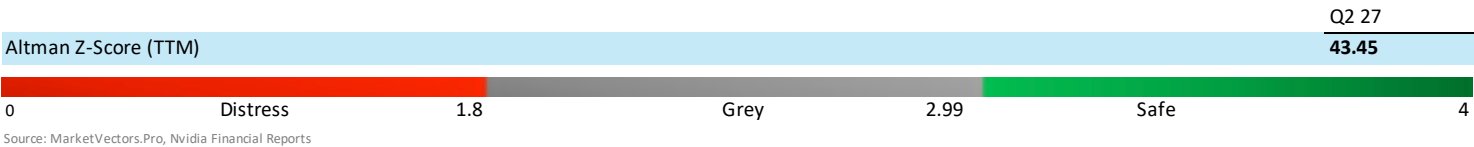
	Previous TTM	Current TTM	Score
Net Income	86,597	192,879	1
ROA	73.14%	81.41%	1
Net Operating	3,068	10,804	1
OCF > Net Income	-9,562	-58,519	0
Long-Term Debt	33,855	54,773	0
Current Ratio	4.21	4.59	1
New Shares Issued	24,347	24,285	1
Gross Margin	69.85%	74.67%	1
Total Asset	1.40	1.28	0

Source: MarketVectors.Pro, Nvidia Financial Reports (million USD)

Piotroski F-Score6/9

Altman Z-Score Analysis

With a Z-Score of 43.45, Nvidia is in the “Safe” zone, indicating a low risk of financial distress. The company demonstrates strong financial health and operational stability, with no immediate concerns regarding solvency. This robust position allows the company to explore strategic opportunities and withstand economic challenges.



FINANCIAL STATEMENT ANALYSIS

Income Statement Analysis

As of Q2 27, Nvidia reported a revenue of 96,221 million USD, marking an increase of 105.9% compared to the previous year to 46,743 million USD. Operating expenses rose to 8,408 million USD, increasing by 44.0% year-on-year from 5,839 million USD. Operating income increased to 63,734 million USD, up by 124.1% compared to last year’s 28,440 million USD. Net income reached 59,688 million USD, reflecting a growth of 125.9% compared to 26,422 million USD last year. The financial performance in the most recent period shows overall improvement across key profitability metrics, supported by growing key financial components. These results suggest improved value creation for shareholders.

Cash Flow Analysis

The company’s cash flow performance over the year demonstrates varied trends across key categories. Net operating cash flows increased by 56.7% from 15,365 million USD to 24,077 million USD, reflecting stronger cash generation from core business activities. Net investing cash flows decreased by 22.0% from -7,127 million USD to -8,695 million USD, indicating higher expenditure on investments, potentially related to strategic initiatives. At the same time, net financing cash flows saw a significant reduction in outflows, improving by 47.8% from -11,833 million USD to -6,176 million USD, which suggests a more controlled approach to financing activities. Lastly, net cash flow and cash equivalents experienced an increase of 356.1% from -3,595 million USD to 9,206 million USD, highlighting a boost in liquidity and the company’s overall financial flexibility.

KEY FINANCIAL RATIOS

Profitability Ratios

ROE

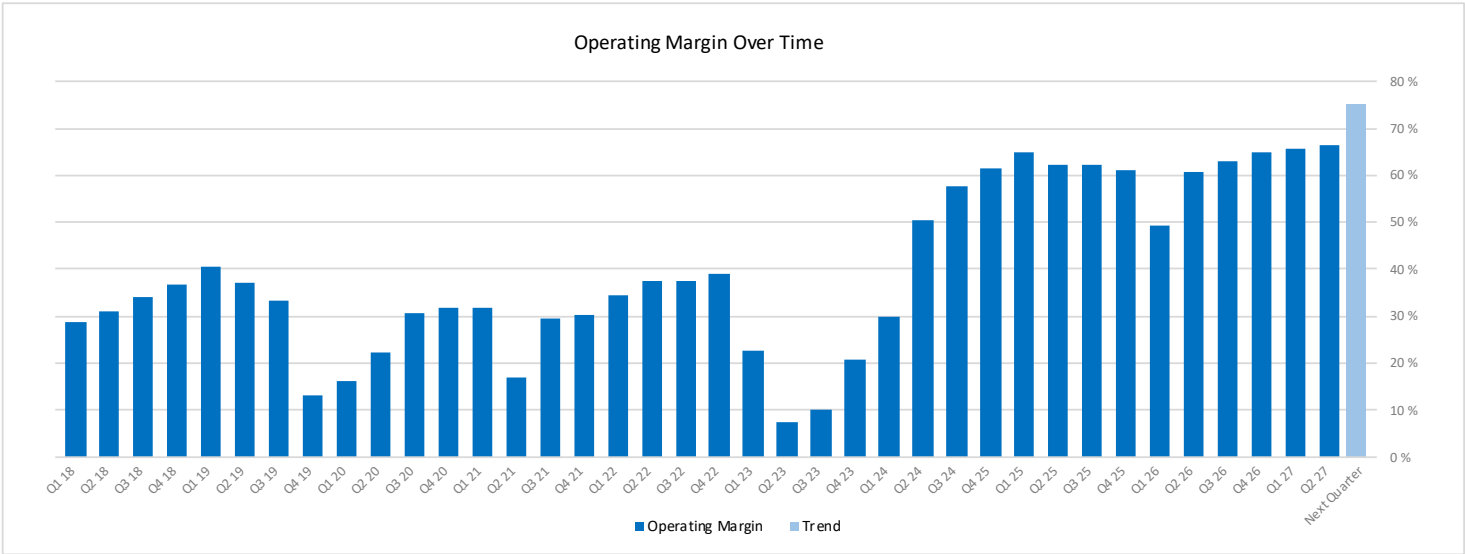
Nvidia's return on equity (ROE) for the most recent quarter is 84.2%, compared to 81.7% in the previous quarter, with a long-term trend value of 92.4%. This increase in ROE indicates improved profitability and more efficient use of shareholders' equity to generate earnings.

Operating Margin

Nvidia's operating margin for the most recent quarter is 66.2%, compared to 65.6% in the previous quarter, with a long-term trend value of 75.3%. This increase in operating margin reflects improved cost efficiency, higher revenue retention, or a stronger pricing strategy. The rise suggests that Nvidia is effectively managing its operational expenses while maintaining revenue growth.

Net Margin

Net margin for the most recent quarter is 62.0%, compared to 71.5% in the previous quarter, with a long-term trend value of 66.2%. This decline in net margin may indicate rising operational costs, pricing pressures, or changes in revenue mix that are affecting overall profitability. A lower net margin suggests that expenses have grown at a faster rate than revenue, potentially requiring adjustments in cost management or pricing strategy.



Source: MarketVectors.Pro, Nvidia Financial Reports (%)

Leverage Ratios

Long-Term Debt & EBITDA

The current long-term debt is 32,366 million USD, and EBITDA is 64,797 million USD. The long-term debt to EBITDA ratio for the most recent quarter is 50%, compared to 14% in the previous quarter, with a long-term trend value of 39%. This increase in the long-term debt to EBITDA ratio may indicate higher leverage, reduced earnings capacity, or an increase in long-term debt obligations. A rising ratio suggests that Nvidia may be taking on additional debt or facing challenges in maintaining EBITDA growth.

Long-Term Debt & Equity

The current long-term debt is 32,366 million USD, while Total Equity stands at 228,984 million USD, resulting in a debt-to-equity ratio of 14.1%. This increase in the long-term debt-to-equity ratio may indicate a greater reliance on leverage, which could increase financial risk. A rising ratio suggests that Nvidia may be taking on additional debt obligations or experiencing challenges in equity growth, which could impact long-term financial stability.

Liquidity Ratios

Quick Ratio

The quick ratio for Nvidia is 3.85, compared to 2.85 in the previous quarter, with a long-term trend value of 4.01. This increase in the quick ratio suggests improved short-term liquidity, indicating that the company has a stronger ability to cover its immediate liabilities with liquid assets. The current level is above 1.0, which is considered financially healthy, demonstrating that the company maintains a solid liquidity position.

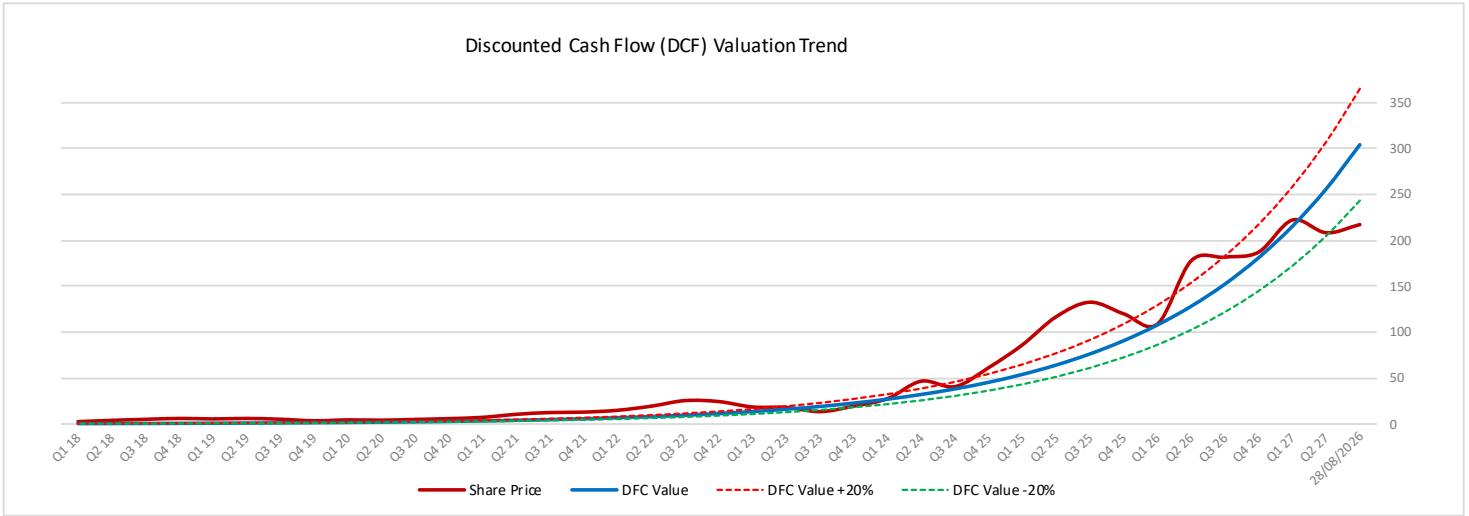
Current Ratio

The current ratio for Nvidia is 4.59, compared to 3.44 in the previous quarter, with a long-term trend value of 4.87. This increase in the current ratio suggests improved liquidity, indicating that the company has a stronger ability to cover its short-term liabilities with current assets. The ratio is above 2.0, reflecting a high level of liquidity. While this suggests financial stability, it may also indicate inefficient capital allocation that could be optimized for higher returns.

COMPANY VALUATION

Discounted Cash Flow

The DCF valuation estimates Nvidia’s total intrinsic value at 7,391,969 million USD, equivalent to 304.38 USD per share based on 24,285 million shares outstanding. With a WACC of 17.7% and a perpetual growth rate of 3.0%, the valuation indicates the stock is 28.6% undervalued at its market price of 217.32 USD on 28 August 2026.



Source: MarketVectors.Pro, Nvidia Financial Reports (USD, generated on 28 August 2026)

SCENARIOS OF FINANCIAL FORECAST

The company’s financial forecasts are presented in three scenarios, reflecting different market conditions.

Optimistic Scenario: Projected to grow by 25% annually.

- Robust macroeconomic conditions.
- Strong industry growth with minimal disruptions.
- Favorable regulatory and competitive environment.

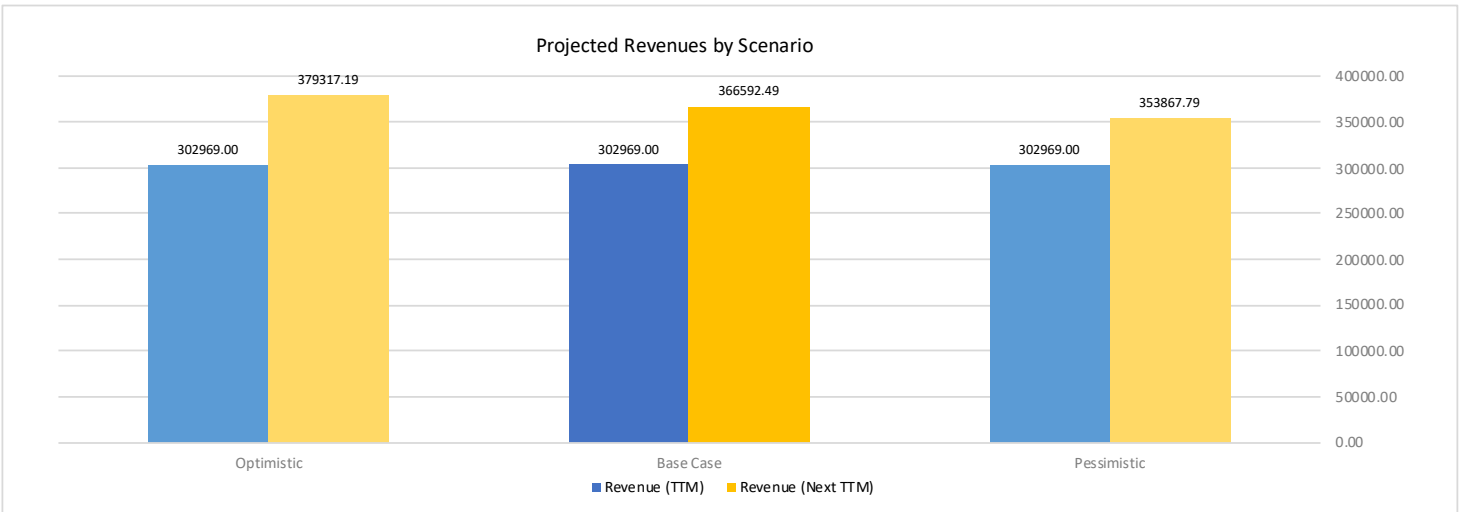
Base Case: Projected to grow by 21% annually.

- Stable macroeconomic conditions.
- Balanced market growth with manageable risks.
- Limited external disruptions from regulation or supply chains.

Pessimistic Scenario: Projected to grow by 17% annually.

- Global economic uncertainty and potential downturn.
- Increased competition and rising operational costs.
- Regulatory and supply chain challenges impacting business operations.

The projected revenue for the next twelve months varies depending on the scenario. Under the optimistic scenario, revenue is expected to increase by 25% to 379,317 million USD, reflecting strong market growth and operational efficiency. In the base case scenario, revenue is forecasted to grow by 21% to 366,592 million USD, assuming stable economic conditions and consistent business expansion. However, under the pessimistic scenario, revenue is projected to increase by 17% to 353,868 million USD, reflecting potential economic slowdowns or adverse market conditions.

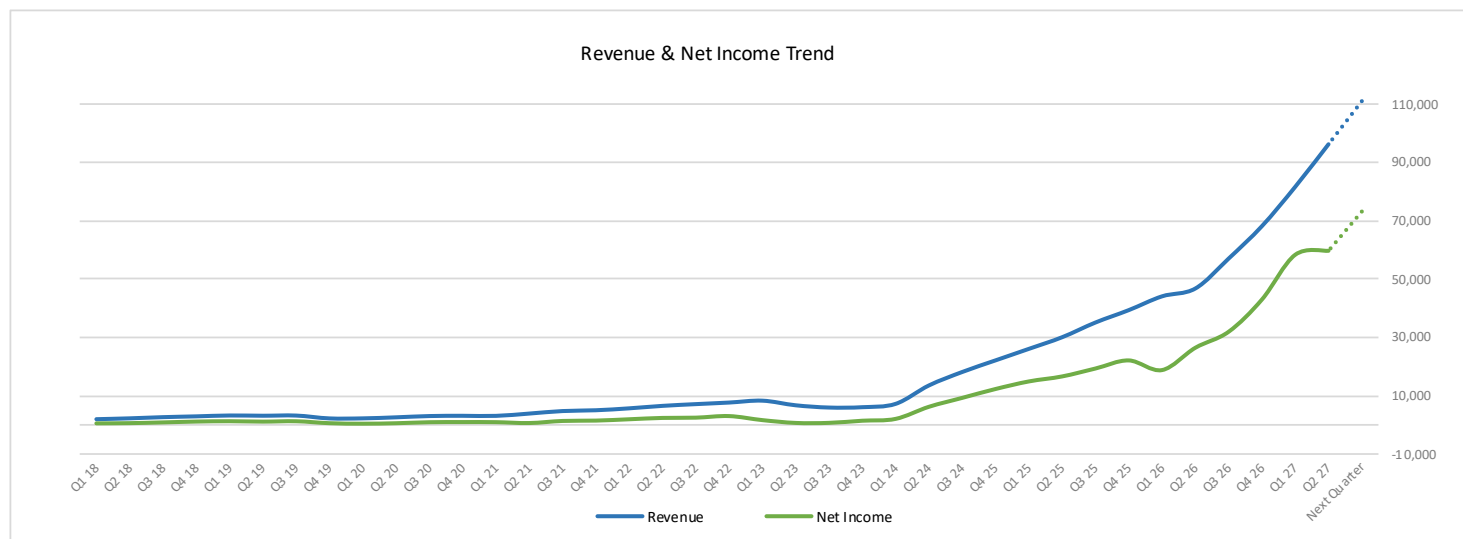


Source: MarketVectors.Pro, Nvidia Financial Reports (million USD)

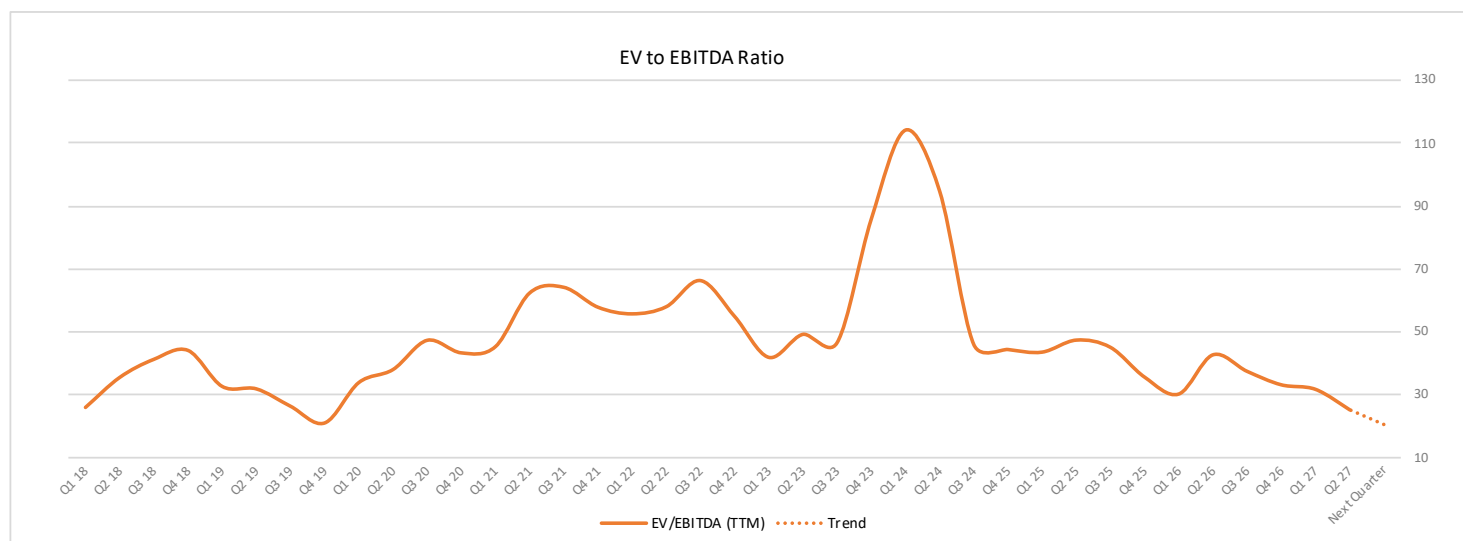
The variation between projected scenarios highlights the Nvidia's ability to perform across a range of market conditions. The growth even in the pessimistic case reflects a degree of resilience and suggests a strong underlying business model. This outlook supports confidence in management’s ability to navigate uncertainty while sustaining forward momentum. Scenario analysis enhances strategic visibility, helping stakeholders understand the potential bandwidth of future results.

SUMMARY

Nvidia demonstrated stronger financial performance in the most recent period, reflecting strong revenue growth, operational efficiency, and profitability improvements revenue increased by 105.9% year-over-year, reaching 96,221 million USD, supported by strong sales performance across all key markets. At the same time, EBITDA grew by 102.9% year-over-year, totaling 64,797 million USD, driven by cost optimization and higher-margin business segments.



Notably, net income surged by 125.9% year-over-year, reaching 59,688 million USD, improving Nvidia's net margin, which expanded to 62.0%. This growth reflects effective expense control and revenue expansion, strengthening the company's bottom-line performance.



Nvidia's valuation metrics indicate a strengthened financial standing. The EV to EBITDA (TTM) ratio currently stands at 25.25, decreasing from 31.74, reflecting a dual shift – rising operational performance and declining market valuation. This suggests a high enterprise valuation relative to earnings.

Nvidia's financial performance in the most recent quarter shows that EBITDA reached 64,797 million USD, reflecting improved operational efficiency and earnings growth. The company's return on equity (ROE) is 84.2%, suggesting enhanced capital utilization and stronger profitability. The long-term debt-to-equity ratio stands at 14.1%, which may reflect rising leverage and a shift toward debt-based financing. The quick ratio is 3.85, showing improved liquidity and better short-term risk coverage. The EV/EBITDA ratio is currently 25.25x, reflecting a balanced or attractive valuation level relative to earnings.

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Kind regards,

The MarketVectors.Pro Team

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