Advanced Assessment

ABC Manufacturing Company

Advanced Assessment #2 2025

Report Generation Date: 04/21/2025

Hayes LLC

Sample Report

Executive Summary

This report uses a **Discounted Cash Flow (DCF) analysis,** to determine your company's estimated value by projecting future **Adjusted EBITDA** and discounting it back to its present value. The system measures your company's specific risk as calculated through the assessment of **6 Key Value Drivers** and shows how the identified risk impacts your firm's current and potential estimated value. Finally, the assessment provides actionable recommendations that will drive enhanced decision-making, business performance and value acceleration for your company.

A **DCF analysis** is one of the most fundamental and widely used valuation methods to determine an estimate of value because it focuses on a company's specific earning power and future potential, rather than just current market conditions.

Because the methodology relies heavily on **assumptions** (growth rates, discount rate, projections), using sensitivity analysis is critical to testing different scenarios.

Thank You for Trusting Us

We sincerely appreciate the opportunity to work with you and support your business in achieving its goals. Our mission is to provide meaningful insights and actionable strategies that empower you to maximize your company's value and reach new milestones.

Key Elements of the DCF Analysis

1. **Projections**
    - The foundation of the DCF analysis is the company's future projected cash flow over the next three years.
    - Key to creating appropriate forecasts for your business is to:
        - Identify realistic growth rates, cost structures, and pricing strategies to project future revenues and expenses.
        - Normalize working capital needs and future capital expenditures.
        - Match capital expenditures with asset depreciation schedules.
    - **Adjusted EBITDA** = Company Net Income + Depreciation + Amortization + Taxes + Interest + One-time, non-recurring, non-operational expenses.
2. **Terminal Value (TV)**
    - Since businesses do not have a fixed lifespan, a **Terminal Value** is calculated to capture value beyond the projected 3-year period.
    - A common method for calculating TV is the Gordon Growth Model, which assumes the company's cash flows grow at a constant rate indefinitely.
    - This analysis assumes a constant long term growth rate of 3% to approximate annual inflation
3. **Discount Rate**
    - The company's future cash flows must be discounted to reflect the time value of money and risk.
    - The discount rate used has been developed based on two primary factors:
        - The company's **stage of business** (i.e., mature, growth, scaling, etc.).
        - The company's specific risk profile (your **Q-Score™**) as measured by 6 Key Drivers of Value.
    - **Present Value Calculation**
        - **Enterprise Value (EV) =** Present Value of Discounted Cash Flows + Terminal Value
        - **Market Value of Invested Capital =** Enterprise Value + Cash
        - **Market Value of Equity Value =** Enterprise Value + Cash – Total Debt

What This Report Does:

- Reflects your company's **unique** growth path and cost structure to provide an indicative **Enterprise Value** under going concern assumptions.
- This report is a forward looking perspective and is tied to your company's **future cash-generating ability**. In contrast, a Market Approach tends to be more backward-looking and is based on market conditions that are outside of the business owner's control.
- Estimates your **Current Range of Value** and **Potential Range of Value** with the difference being your **Value Gap**.
- Measures your intangible value around **6 Key Value Drivers** (Strategic Value, Organizational Value, Customer Value, Employee Value, Financial Value and Governance).
- Prioritizes **Actionable Steps** to close your Value Gap and dollar ranks the recommendations, allowing you to focus resources where they will have the largest valuation impact.

What This Report Doesn't Do:

- While the range of multiples specific to your industry are shown for information purposes, the estimated range of value for your company does not rely on a Market Approach.
- It does not include the value of **assets** such as real estate, equipment, or excess working capital.
- It is not a Certified Valuation and does not meet regulatory or financial reporting requirements.
- It does not guarantee a transaction price.

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Recommendations and Next Steps

1. **Review & Prioritize**– Validate the operational action items in each of the 6 Key Value Drivers; assign owners, timelines, and KPIs.
2. **Implement Quick Wins** – Target the highest-impact, lowest-effort recommendations to begin closing the Value Gap immediately.
3. **Engage Advisors** – Consider legal, accounting, and strategic consultants to formalize process documentation, governance policies, and IP protection.
4. **Monitor Progress** – Re-run the diagnostic annually (or after major strategic changes) to quantify improvement in Q-Score and enterprise value.
5. **Validate Forecasts** – Update financial projections as initiatives gain traction; refine the DCF and multiple cross-checks to keep value estimates current.

By following the roadmap outlined in this report, you can make data-informed decisions, reduce risk, and accelerate the company's growth in intrinsic value.

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About Our Services

We specialize in providing actionable, reliable, and valuation insights tailored to your needs. We offer:

- Comprehensive Discovery Process: Our approach incorporates over 65 targeted questions about your business, resulting in a detailed report that identifies its current state and highlights potential improvements to increase its value.
- Value Growth Advisory to help you address value gaps and increase profitability.
- Certified Valuations for litigation, tax planning, financial reporting, and mergers and acquisitions.

About Our Firm

We are dedicated to empowering business owners with the tools and insights needed to maximize their company's value. Our team combines deep expertise in valuation, business strategy, and exit planning to deliver actionable solutions tailored to your unique needs. Whether planning for growth, preparing for a sale, or navigating a transition, we are committed to providing trusted guidance and support every step of the way. Your success is our priority.

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Glossary

Adjustments	Adjustments should be made for one-time or non-recurring income and expense items. Examples include: 1. Adjustments to owner's compensation: Many owners of closely held companies, especially successful and highly profitable ones, give themselves outsized salaries and bonuses. Nothing is wrong with that, of course, but an acquirer is unlikely to pay that kind of compensation to the new president (and other execs). 2. Personal expenses: Running personal expenses through the company is a common occurrence in closely held companies. These personal expenses are a legitimate add back because the new owner won't continue to incur these expenses. Personal expenses can include: club memberships, car expenses, family members on the payroll who do not have active roles in the company, and travel, meals, entertainment for personal use (not business purposes). 3. Rent of facilities at prices above or below fair market value. Many companies do not own the facilities they occupy, but instead rent them from a holding company owned by a shareholder. The rent is often arbitrarily set above the going market rent. Adjustments should be made by adding back the arbitrary, non-arms-length rent and subtracting the true market rent.
Barriers to Entry	Obstacles that make it difficult to enter a given market.
Board of Directors	A group of individuals that are elected as, or elected to act as, representatives of the stockholders to establish corporate management related policies and to make decisions on major company issues. Such issues include the hiring/firing of executives, dividend policies, options policies and executive compensation.
Brand	A company's brand encompasses a variety of concepts: it is your trademark, your trade name, the quality of your product, your technology, your reputation.
Budget	An estimate, often itemized, of expected income and expense for a given period in the future.
Business Plan	The purpose of a business plan is to explain in writing what your business idea is, why it is needed in the marketplace, how it will succeed and who will make it happen.
CFO	Chief Financial Officer
Commodity Product	A basic good used in commerce that is interchangeable with other commodities of the same type. Commodities are most often used as inputs in the production of other goods or services.
Corporate Governance	The system of rules, practices and processes by which a company is directed and controlled. Corporate governance essentially involves balancing the interests of the many stakeholders in a company - these include its shareholders, management, customers, suppliers, financiers, government and the community.
Culture	Corporate culture refers to the shared values, attitudes, standards, and beliefs that characterize members of an organization and define its nature.
Customer Lifetime Value	customer lifetime value = the average customer lifetime revenue minus lifetime cost of acquisition plus cost of retention/services.
CYE	calendar year-end
EBITDA	Earning before interest, taxes, depreciation and amortization (EBITDA) should be reflected on a normalized basis. ADJUST FOR: 1) market-rate compensation; 2) one-time income or expense items; and 3) non-business related income and expense items.
Economic Cycles	The natural fluctuation of the economy between periods of expansion (growth) and contraction (recession).
Economies of Scale	When more units of a good or a service can be produced on a larger scale with less input costs on average.
ESG	Environmental, Social and Governance - a generic term used in capital markets and used by investors to evaluate corporate behavior and to determine the future financial performance of companies.
ESOP	An employee stock ownership plan (ESOP) is an employee-owner program that provides a company's workforce with an ownership interest in the company.
Fixed Costs	A cost that does not change with an increase or decrease in the amount of goods or services produced.

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Innovation	The process of translating an idea or invention into a good or service that creates value for which customers will pay.
Intellectual Property	The four main types of intellectual property that can be used to protect a business are 1) copyrights; 2) patents; 3) trademarks; and 4) trade secrets.
Life cycle	The course of events that brings a new product into existence and follows its growth into a mature product and into eventual critical mass and decline.
LTM	Last twelve months (aka: trailing twelve months).
Multiple	A term that measures some aspect of a company's financial well-being, determined by dividing one metric by another metric.
Net Profit Margin	A ratio of profitability calculated as net income divided by revenues, or net profits divided by sales. It measures how much out of every dollar of sales a company actually keeps in earnings.
NTM	Next twelve months.
Patent	A government license that gives the holder exclusive rights to a process, design or new invention for a designated period of time.
Recurring	Recurring business is when a customer buys the same product or service at pre-set intervals and will continue buying that same product or service on schedule until cancelled.
Repeat Customer	Repeat business is when a customer returns and transacts business, but there is not real predictability as to when they will be back or the amount that they will spend. Repeat sales often play a role in brand loyalty.
Scalability	In essence the ability to grow, meaning that your business has the potential to multiply revenue with minimal incremental cost. For example, a software product is a scalable solution, because it costs real money to build the first copy, but unlimited additional copies can be quickly cloned for almost no incremental cost. Consulting services, like marketing, are not scalable, because they must be delivered by experts, and cloning experts is slow and expensive.
Scalable	In essence the ability to grow, meaning that your business has the potential to multiply revenue with minimal incremental cost. For example, a software product is a scalable solution, because it costs real money to build the first copy, but unlimited additional copies can be quickly cloned for almost no incremental cost. Consulting services, like marketing, are not scalable, because they must be delivered by experts, and cloning experts is slow and expensive.
Stock Option Plan	Employee stock options represent one form of equity compensation granted by companies to their employees and executives. They give the holder the right to purchase the company stock at a specified price for a limited duration of time in quantities spelled out in the options agreement.
Switching Costs	The negative costs that a consumer incurs as a result of changing suppliers, brands or products. Although most prevalent switching costs are monetary in nature, there are also psychological, effort and time-based switching costs.
Variable Costs	Expenses that vary with production output. Variable costs are those costs that vary depending on a company's production volume; they rise as production increases and fall as production decreases.

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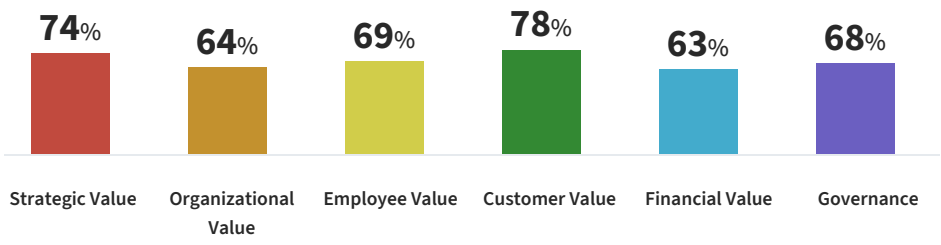
Business Overview

Overall Q-Score:

722

Category Score



Your Company
ABC Manufacturing Company

Survey Name
Advanced Assessment #2 2025

Sector
31. Manufacturing

Industry
315. Apparel Manufacturing

Current Revenue
$5,000,000

Revenue Growth
25.0%

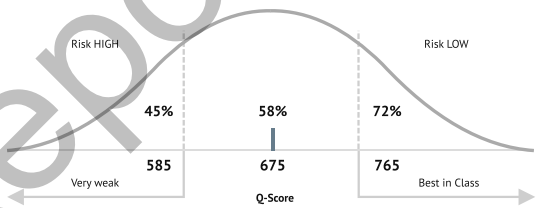
Number of Employees
100

Current EBITDA
$1,120,000

EBITDA Margin
22.4%

Management Team
5

Common Sense Scoring



Date	Survey Name	Current Q-Score | Value Range		Potential Q-Score | Value Range	
04/21/25	Advanced Assessment #2 2025	722	$7.1MM - $8.7MM	812	$9.1MM - $11.1MM
04/21/25	Advanced Assessment #1 2025	570	$5.2MM - $6.3MM	669	$6.3MM - $7.7MM

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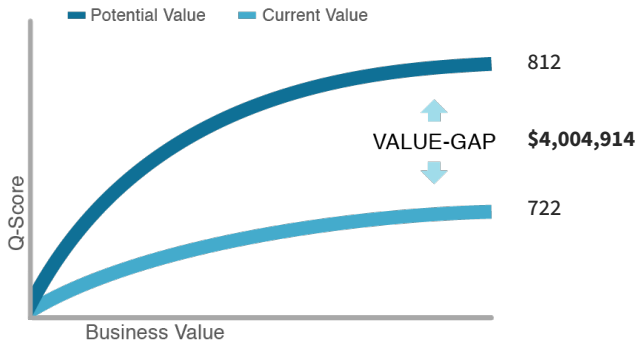
Forward Insights™

What is your Value Gap?

Your Value Gap

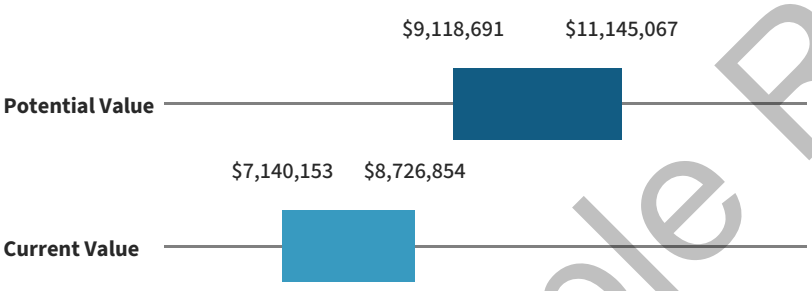


Close the **Value Gap** by increasing your Q-Score.

Take action on the recommendations under each Business Value Driver to improve the operations of your business, reduce your company's risk profile, and significantly increase your business value.

Your Enterprise Value

Current & Potential Value Range (Low/High)



Your current and potential Enterprise Value is based on the following inputs[1]:

- The company's ***current and potential*** Q-Score.
- The company's stage of business.
- Management's projected cash flows.

[1] *The results represent estimates only and reflect the value of the company on a going concern basis. This report should be used for informational purposes only.*

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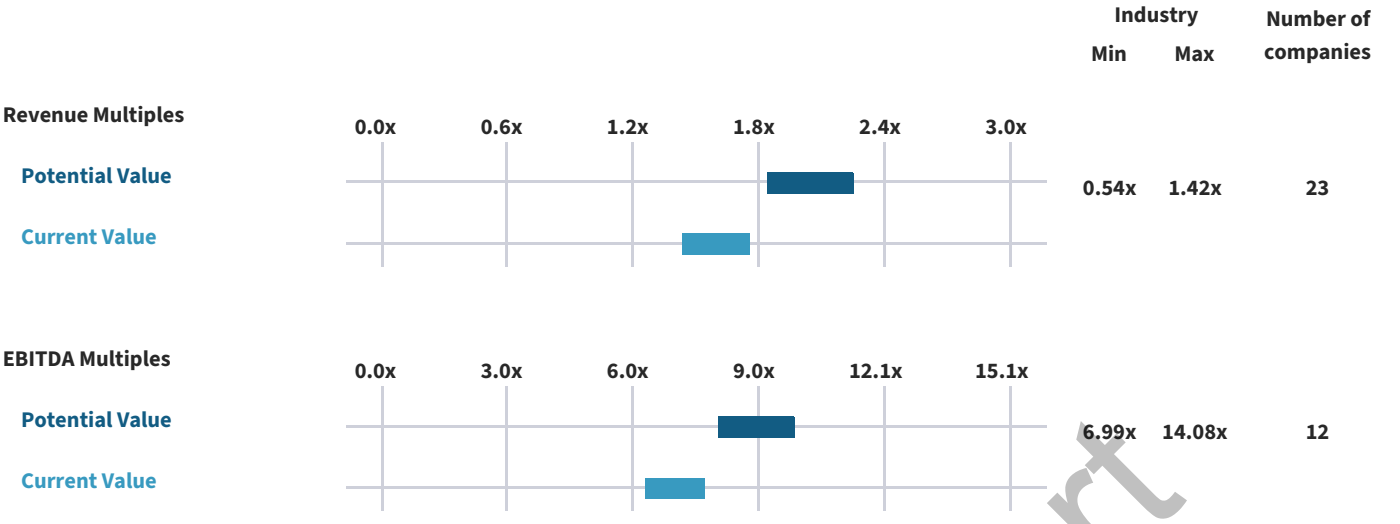
315. Apparel Manufacturing



Multiples based on last three years, revenue over $1.0MM and profitable. Source - Dealstat.

Value Acceleration - How Actions Impact Value

Value Driver Categories	Recommended Actions	Impact to Q-Score	% Impact to Value	$ Impact to Value
Strategic Value	3	+8	8.6%	$343,100
Organizational Value	3	+24	26.9%	$1,076,086
Employee Value	3	+20	21.9%	$876,811
Customer Value	3	+17	18.5%	$739,809
Financial Value	3	+15	16.4%	$657,608
Governance	3	+7	7.8%	$311,499
TOTAL	**18**	**+90**	**100.0%**	**$4,004,914**

Values are rounded

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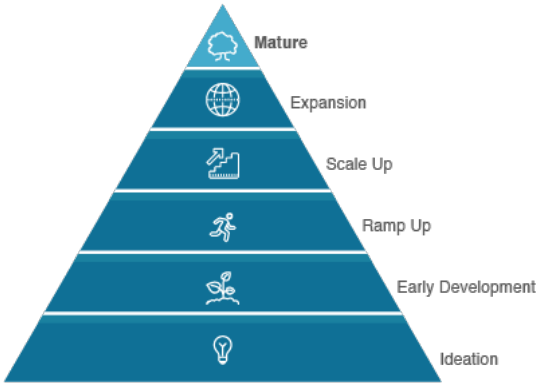
Stage of Business

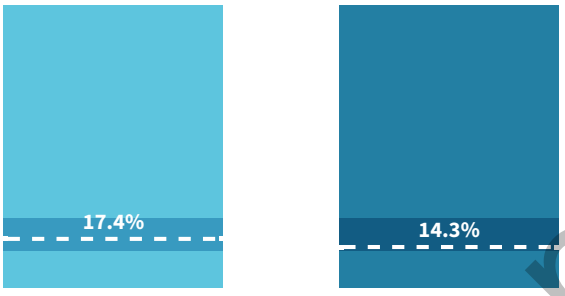
6 Stages of Business



Company has an established history of at least 5 years of profitable operations and positive cash flows.

Discount Rate

Discount Rate



The discount rate selected for your company is based on your stage of business and concluded Q-Score.

Discounted Cash Flows

Company Projections	2024	2025	2026	2027
Revenue	$5,000,000	$6,000,000	$7,000,000	$8,000,000
Gross profit	$2,500,000	$3,000,000	$3,500,000	$4,000,000
Total operating expense	$1,500,000	$2,000,000	$2,125,000	$2,250,000
Net Operating Income	$1,000,000	$1,000,000	$1,375,000	$1,750,000
Depr, amort & other non-cash exp	$120,000	$130,000	$140,000	$150,000
One time rev & exp (+/-)	$0	$0	$0	$0
Adjusted EBITDA	$1,120,000	$1,130,000	$1,515,000	$1,900,000

Under the Discounted Cash Flow method, a company's projected operating cash flows are discounted to present value with an appropriate risk-adjusted discount rate. This method yields a price that investors would be willing to pay for the indicated cash flow stream.

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Financial Values	
Current Enterprise Value*	**$7,933,504**
Plus: Cash	$750,000
Equal: Market Value of Invested Capital (equity + debt)	**$8,683,504**
Less: Interest-Bearing Debt	($2,000,000)
Equal: Market Value of Equity	**$6,683,504**

*Current Enterprise Value is based on the mid-point of your Current Value range.
Note: Other considerations in determining purchase price may include excess working working capital, etc.

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Strategic Value

Strategic Value Score

74

What is Strategic Value?

Strategic value is your market position within the industry. It includes barriers to entry, regulatory requirements, economic impacts, and technological changes. Competition, market share, and product substitution all impact valuation.

Action Summary

Discuss with legal counsel how to best protect your company's intellectual property.

+4

Protect yourself against economic downturns by having a cash reserve, maintaining lean inventory levels, and diversifying your customer base. Build your credit now with your banker when you don't need the financing.

+2

Grow your market position by clearly communicating your company's value proposition and testing new ways to deliver your products/services.

+2

Value Increase Impact

+8

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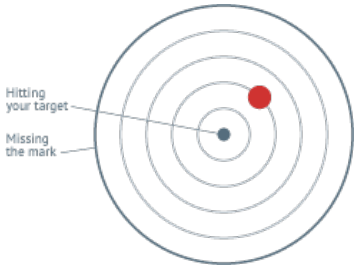
Innovation Target

Innovation Target

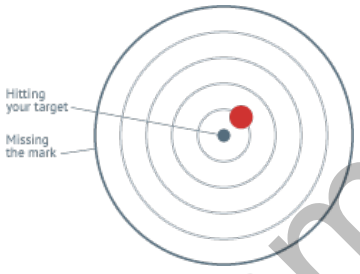


WHY: Innovation is the process of ideation, evaluation, selection, development, and implementation of new or improved products, services or programs.

ACTION: Create clear processes for introducing, vetting and testing ideas. Engage your customers to determine their needs and create metrics that facilitate internal decision-making and innovation selection. Consult with an attorney to ensure that your company's intellectual property is protected.

Market Target

Market Target



WHY: Market share is the percentage a company controls of the total addressable market for its products and services. Companies increase market share through innovation, strengthening customer relationships, smart hiring practices, and acquiring competitors.

ACTION: Your company captures a sizable portion of the market but don't take your market position for granted. Reduce company risks by:

1. Staying relevant through innovation;
2. Being attentive to the company's image;
3. Cultivating relationships with your competitors;
4. Diversifying into other markets; and
5. Responding to emerging consumer and social needs.

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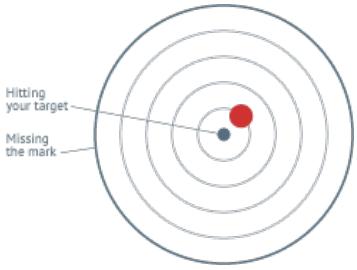
Industry Target

Industry Target

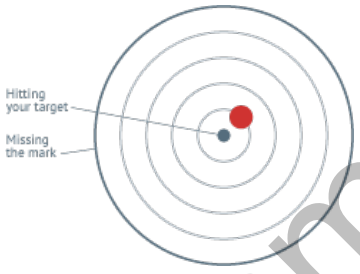


WHY: Dynamics such as barriers to entry, regulatory requirements, economic impacts and technological changes within your operating environment impact valuation.

ACTION: Put yourself in the shoes of a competitor and ask yourself how you would get around barriers to entry. High barriers to entry are good only if your already established in a market. An industry with moderate to high barriers to entry is attractive to investors and buyers. Fewer players in the market mean less competition and higher margins.

Brand Target

Brand Target



WHY: Companies with strong brands are associated with higher valuations, especially those in consumer businesses. Brand create customer loyalty and market recognition.

ACTION: Continue to increase your brand value by answering the following questions:

1. Who is the hero of your story - you or your client?
2. What does your client want as it relates to your brand?
3. What does your client want to become as it relates to your brand?

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Organizational Value

Organizational Value Score

64

What is Organizational Value?

Organizational Value encompasses a company’s culture and communication, systems, and processes. The internal structure of a company is the main defense in preventing fraud, workplace accidents and litigation. The culture of a company, although intangible, can undermine progress or propel the company forward.

Action Summary

Document your company's goals and objectives and share with employees.

Create a written mission and vision statement and share with all of your company's stakeholders.

Document systems and processes and update periodically.

Value Increase Impact

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Systems & Processes

WHY: Documented business processes will improve profitability, performance, and productivity. Routinely updating these business processes identifies gaps as technology evolves and your company grows.

ACTION: Update business processes annually in order to identify gaps as technology develops and your company grows. Consider where redesigns of your business processes could lead to improvements in efficiency and quality of service.

Culture

Culture

WHY: Organizational culture is a system of shared assumptions, values and beliefs that govern how employees behave. It aligns performance, well-being, collaboration, responsibility, mission and values.

ACTION: Relate business decisions back to the company vision and values. Regularly monitor how well employees know your mission and values, understand them and live by them.

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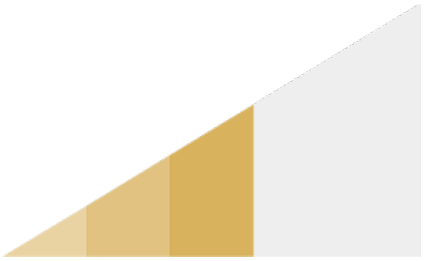
Communication



WHY: In companies with strong communication, employees are able to communicate their thoughts and suggestions to leadership, while leadership effectively communicates necessary information to employees.

ACTION: Implement a formal communication systems and document the company's goals and objectives to improve accountability amongst employees. Provide employees clear instructions and a roadmap of what is expected from them to create greater empowerment.

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Employee Value

Employee Value Score

69

What is Employee Value?

Employee Value considers the strength of employees, especially the management team. It looks at experience in the industry and tenure with the company. Most importantly, in small to mid-sized businesses, there is often a disproportionate amount of revenue generation, client relationship management and leadership centered in one or two individuals. In these cases, a "key man" discount is often applied to the value of a company because if the owner sells the business or leaves the firm, his/her value is not transferable.

Action Summary

Delegate responsibility and authority to key members of management and build accountability measures.

Build a management team with clearly defined roles and responsibilities that tie their personal contributions to the overall performance of the company.

Document system and processes in order to build redundancies and reduce your company's dependency on any one employee.

Value Increase Impact

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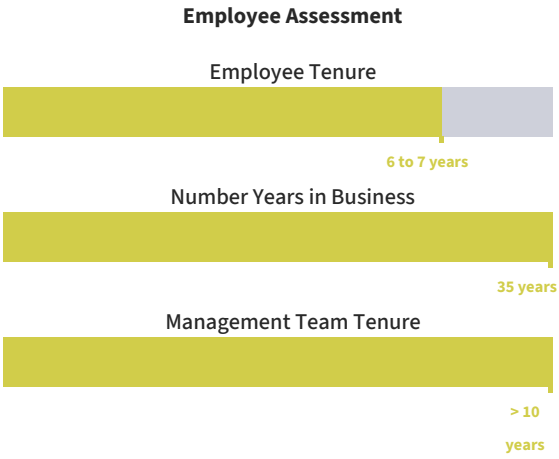

WHY: Finding good employees is challenging for any business. Even if you manage to find good workers, retaining them is another challenge. High turnover suggests worker dissatisfaction while long-term employees tend to indicate employee satisfaction.

Congratulations! You have an experienced management team that are recognized leaders in your industry. The low turnover among your management team and employee base shows that they are happy with their workplace environment and the company's prospects.

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Key Man Risk

WHY: The high dependency on one or a few key individuals in the company increases risk and threatens the continued success of the organization.

ACTION: Create redundancies within the organization for the most critical responsibilities. Cross train employees, rebalance work assignments and provide career growth opportunities to staff in order to build more breadth and depth across the organization. Set clear, measurable goals and implement incentive plans to motivate associates.

Managers to Employees Ratio

WHY: There is no ideal, one size fits all ratio of Managers to Staff that works in all organizations. The work performed should dictate the management to staff ratio.

Complicated processes tend to require a smaller management to staff ratio since there is a greater need for interaction, coaching, and mentoring. On the other hand, more experienced managers may be able to accomodate higher ratios.

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Customer Value

Customer Value Score

78

What is Customer Value?

Customer Value reflects the health of your customer base. A loyal and growing customer base is achieved when your business provides a value proposition in which customers receive benefits that outweigh the costs. When it comes to revenue, customer retention is hugely important to consistent growth and financial performance. Customer diversification, repeat customers and customer satisfaction are important indicators of the health of your customer base.

Action Summary

Increase repeat customers by communicating regularly to your customers, boosting your social media presence, providing excellent customer service and creating convenience for your customers.

+6

Increase the lifetime value of your customer by offering rewards and incentives, by delivering superior service and by creating brand loyalty.

+6

Perform periodic assessments of macroeconomic impacts or large trends impacting your customer base.

+6

Value Increase Impact

+18

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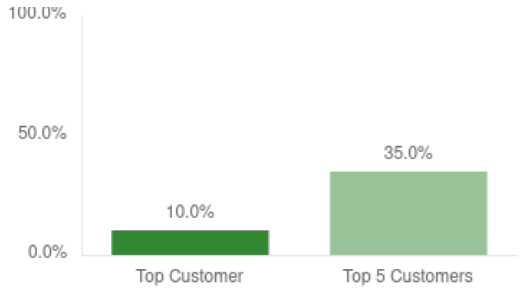
Customer Concentration

Customer Base

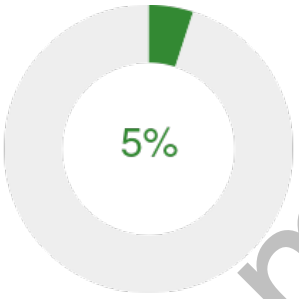


WHY: Customer concentration is a measure of how total revenue is distributed among your customer base. A company serving a large number of small-volume customers has a lower customer concentration than a firm where a handful of large customers account for the majority of its business. Whether the company is a start-up or mature business, high customer concentration is a significant risk and negatively impacts the value of your business. The loss of one or two customers is less damaging the more diverse your customer base.

Congratulations! Your company benefits from a diverse customer base. The loss of any one customer is unlikely to have a long lasting impact on your company's revenue, profit and cash flows.

Repeat Customers

Repeat Customers



WHY: Repeat business signals that the company's value proposition is high and there is no need for the customer to go elsewhere. The tenure of repeat customers also shows that you have a quality customer base. It is typically less costly to get your existing customers to buy more than it is to find new ones.

ACTION: The majority of your revenue each year is driven by new customer acquisition and minimal repeat business.

Increase repeat business:

1. Provide excellent customer service;
2. Communicate regularly with customers;
3. Boost your social media presence;
4. Create coupons, discounts and specials; and
5. Create convenience for your customers.

Sample Report

Customer Satisfaction

Very Satisfied

WHY: High rates of customer satisfaction reflect high value propositions and translate into customer retention and higher profitability.

Congratulations! Your customers are very satisfied with your business, product and services and you have established methods for collecting and measuring customer satisfaction.

Sample Report

Financial Value

Financial Value Score

63

What is Financial Value?

Financial Value reflects not only the revenue growth and profitability of a company, but also the financial controls and systems in place to manage the business. High quality financial systems, associated data, and timely information output are essential to support growth and profitability and instill confidence in the financial activity of the company.

Action Summary

Revenue: The size of a business affects risk. Understand how market fluctuations can impact your customer base and financial performance. Have a list of operational priorities that can be quickly implemented in the event of a downturn.

Develop and improve your budget setting process

Create a long term budget that incorporates the company's goals and objectives as well as input from key members of management that will be responsible for executing on the business plan. Understanding where the variances occur in your budget is a critical part of keeping financial processes healthy as your business evolves.

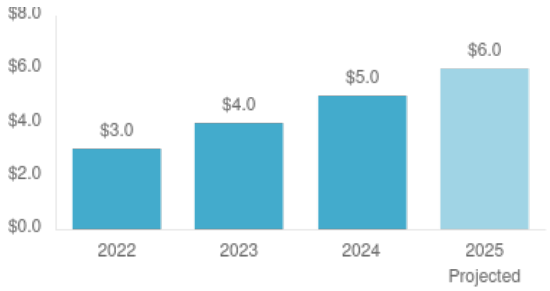
Consider if there is a way to integrate recurring revenue into your business model. Recurring revenue models give greater foresight into cash flows, which makes it easier to predict future revenue growth and profit margins.

Value Increase Impact

Sample Report

Revenue

Revenue ($MM)



WHY: To be successful and remain in business, both revenue growth and profitability are important and necessary for a company to survive and remain attractive.

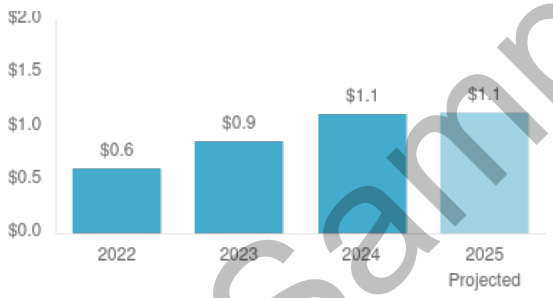
$

ACTION: Increase revenue.

1. Focus on your customers by delivering a great experience in order to improve customer retention and referrals.
2. Focus your marketing efforts on your ideal customers and prospects.
3. Expand your distribution channels.
4. Add complimentary services or products.

EBITDA

EBITDA ($MM)

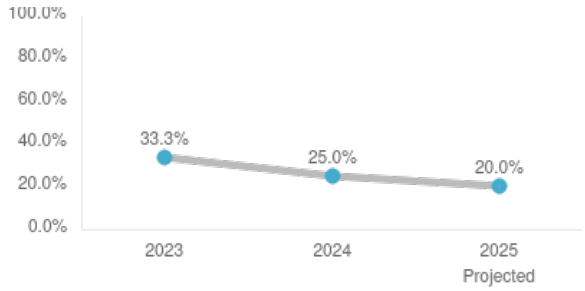


WHY: Earnings before interest, taxes, depreciation and amortization (EBITDA) measures a company's earnings capacity. It is especially useful for comparing companies with different capital structures (equity vs. debt). Depreciation and amortization are non-cash expenses, so EBITDA also provides insight regarding approximate cash generation.

Sample Report

Revenue Growth

Revenue Growth



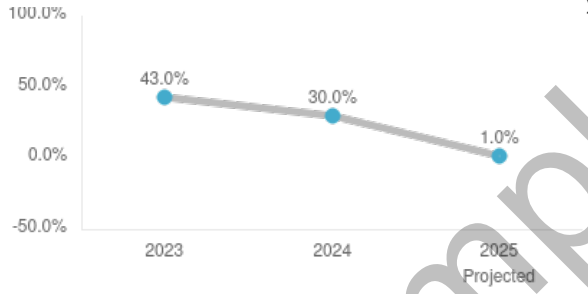
WHY: Companies focused on maximizing revenue as opposed to profit are typically looking to gain market share. This is a characteristic strategy for start-up businesses who are entering new markets or launching new products.

$

Congratulations! Your revenue growth is strong.

EBITDA Growth

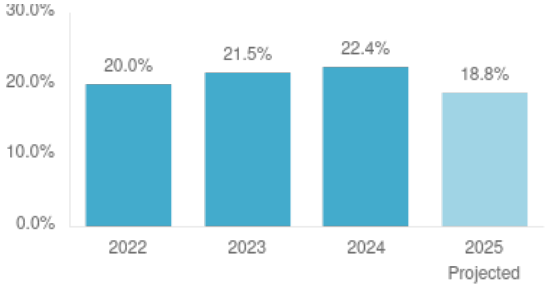
EBITDA Growth



WHY: The value of your company can be determined by applying a multple to your earnings.

Sample Report

EBITDA Margin



WHY: EBITDA margin measures income generation relative to revenue and is used to assess operational efficiency.

$

ACTION: With solid EBITDA margins, the company is positioned to execute on its business strategy.

Sample Report

Governance

Governance Score

68

What is Governance?

There is a growing recognition that ESG integration is a fundamental part of doing business. The integration of ESG factors into the planning and operation of your business contributes to your competitiveness, attractiveness and sustainability.

Action Summary

Social

Document and implement the company's objectives regarding social factors related to your industry.

+2

Environmental

Document and implement the company's objectives regarding environmental factors related to your industry.

+2

Governance

Implement and update corporate governance documents.

+2

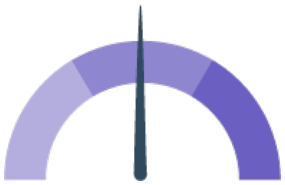
Value Increase Impact

+6

Sample Report

Environmental

Environmental



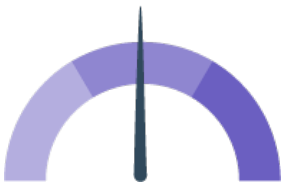
Average

WHY: Environmental factors that are generally considered material include natural resource management, pollution prevention, water conservation, energy efficiency and reduced emissions, the existence of carbon assets, and adherence to environmental safety and regulatory standards.

ACTION: Be sure your environmental policies are widely understood and communicated clearly to your stakeholders. You are heading in the right direction.

Social

Social



Average

WHY: Social factors that are generally considered material include human rights and welfare concerns in the workplace, product development, data privacy, and community impact. Some of the biggest issues in the social area is the overall consideration of fair wages and benefits.

ACTION: Be sure your corporate social responsibility policies are widely understood and communicated clearly amongst your stakeholders. You are heading in the right direction.

Sample Report

Governance

Above Average

WHY: Corporate governance is the arrangement of checks and balances, and incentives a company needs in order to minimize and manage the conflicts of interests between insiders and external stakeholders. Board independence, separation of senior roles within the organization and executive compensation are key areas of focus.

ACTION: Communicate your governance policies to all stakeholders. You are on your way to reaping the benefits of strong corporate governance.

Sample Report

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