

Walt Disney (DIS)

Communication Services / Entertainment

StockRover

Stock Report | July 19, 2025

\$121.42 **-\$0.79 (-0.65%)** as of Friday's close

Cap (\$M USD)
\$218,282

P/E
24.8

EPS (1Y)
87.7%

Dividend
\$1.00

Last Filing
03/31/25

52-wk Range

\$80.10  \$124.69

Sales (\$M)
94,040

Fwd. P/E
19.3

Sales (1Y)
4.5%

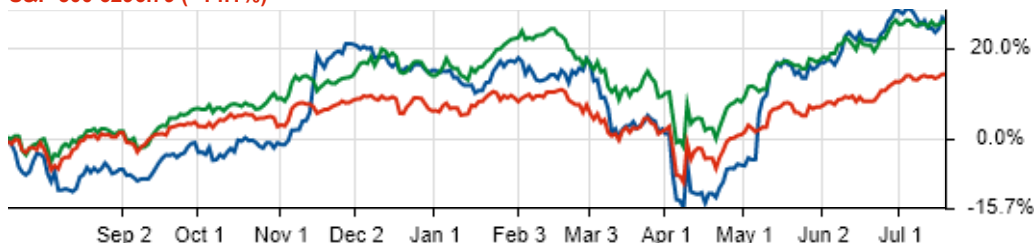
Fwd. Yield
0.8%

Next Earnings
08/06/25

Dividend Adjusted Return Jul 18, 2024 - Jul 18, 2025

DIS 121.42 (+25.9%) **Communication Services 170.38 (+25.6%)**

S&P 500 6296.79 (+14.1%)



DIS has outperformed the S&P 500 by 11.8% in the past year.

DIS has performed nearly in line with its sector over the past year.

The Communication Services sector has outperformed the market by 11.5% in the past year.

ANALYST CONSENSUS

Strong Buy

The consensus rating has improved a little since last month when it was also Strong Buy.



Strong Buy | 21
Buy | 2
Hold | 5
Sell | 0
Strong Sell | 0

QUANTITATIVE SCORES

Fair Value \$158.17

Margin of Safety 30%

Medium Confidence ⓘ

The Margin of Safety is the difference between a company's Fair Value and the current price. See more on page 8.

2 warnings ⓘ
Details on Page 8

Value Score

68

Value Score: Our value score looks at EV/EBITDA, P/E, P/S, P/TB (Price/Tangible Book) and EPS Predictability. P/S and P/TB are compared within a sector. Other metrics are compared across all stocks

Quality Score

79

Quality Score: Our quality score compares profitability and balance sheet metrics to find high quality companies using ROIC, Net Margin, Gross Margin, Interest Coverage, and Debt / Equity metrics.

Growth Score

86

Growth Score: Our growth score looks at the 5 year history and the forward estimates for EBITDA, Sales, and EPS growth, ranking the best companies across all stocks.

Sentiment Score

88

Sentiment Score: Our sentiment score finds stocks in favor by analyzing Short Interest, returns in key periods over the last year, Price vs. 52-wk High, Days Since 52-wk High and MACD signals.

BUSINESS SUMMARY

Disney operates in three global business segments: entertainment, sports, and experiences. Entertainment and experiences both benefit from the firm's ownership of iconic franchises and characters. Entertainment includes the ABC broadcast network, several cable television networks, and the Disney+ and Hulu streaming services. Within the segment, Disney also engages in movie and television production and distribution, with content licensed to movie theaters, other content providers, or, increasingly, kept in-house for use on Disney's own streaming platform and television networks. The sports segment houses ESPN and the ESPN+ streaming service. Experiences contains Disney's theme parks and vacation destinations, and also benefits from merchandise licensing.

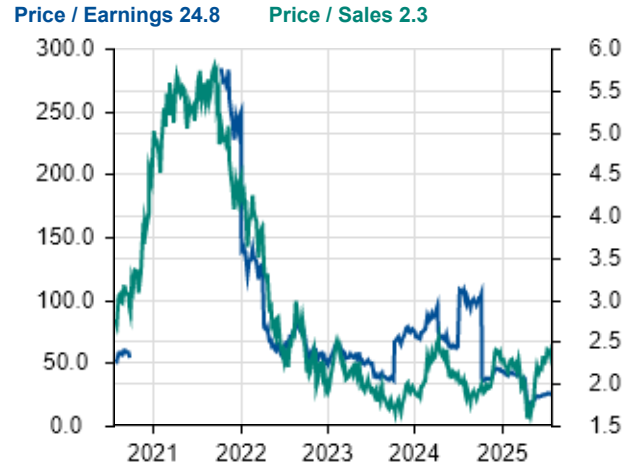
Employees 233,000

Homepage www.thewaltdisneycompany.com

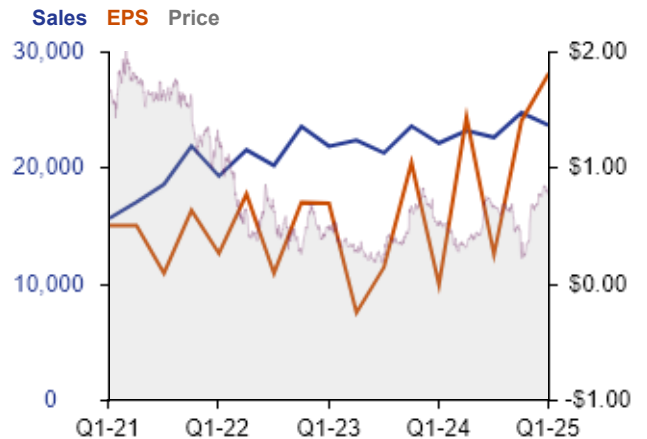
Headquarters Burbank, CA

VALUATION SUMMARY

	DIS	Industry	S&P 500
Value Score	68	47	70
Price / Earnings	24.8	6.0	30.0
Price / Sales	2.4	3.1	3.3
Price / Free Cash Flow	20.3	31.0	40.3
Price / Book	2.1	3.9	5.5
Price / Tangible Book	10.4	38.6	500+
EV / EBITDA	14.3	17.9	25.2
EPS Predict. Pctl.	44	34	71
Piotroski F Score	8	8	6
5-Year P/E Range	16.7	-	-
5-Year P/B Range	1.4	4.4	4.4
5-Year P/S Range	1.6	5.8	5.8


GROWTH SUMMARY

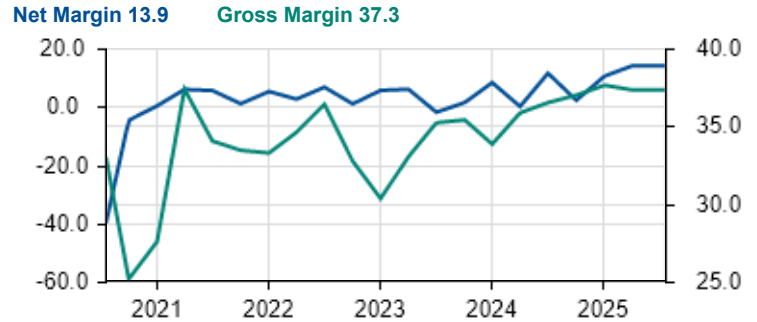
	DIS	Industry	S&P 500
Growth Score	86	50	76
Sales Growth			
Sales Growth Next Year	5.4%	8.3%	10.5%
Sales 1-Year Chg (%)	4.5%	7.4%	7.3%
Sales 3-Year Avg (%)	5.1%	5.6%	7.9%
Sales 5-Year Avg (%)	6.1%	9.3%	11.1%
EPS Growth			
Next Yr. Growth Est.	8.8%	20.0%	14.3%
EPS 1-Year Chg (%)	87.7%	74.9%	10.1%
EPS 3-Year Avg (%)	41.2%	-	7.7%
EPS 5-Year Avg (%)	-	45.2%	14.9%


PEERS ANALYSIS SUMMARY

Ticker	Company	Cap (\$M USD)	P/E	Fwd. Yield	1M Return	1Y Return	Margin of Safety	Value Score	Growth Score	Quality Score
NFLX	Netflix	\$514,617	51.6	-	-1.1%	88.1%	-15%	58	91	96
DIS	Walt Disney	\$218,282	24.8	0.8%	3.5%	26.5%	30%	68	86	79
LYV	Live Nation Entert...	\$34,879	51.0	-	1.5%	58.9%	24%	68	74	66
WBD	Warner Bros. Disc...	\$31,544	-	-	20.6%	49.6%	16%	70	59	38
FW...	Liberty Media	\$25,561	500+	-	1.4%	31.7%	8%	49	66	49
FOXA	Fox	\$24,243	13.9	1.0%	2.8%	53.4%	21%	86	59	71
NWSA	News	\$17,743	36.4	0.7%	6.4%	8.3%	21%	62	51	61
WMG	Warner Music Gr	\$16,273	36.4	2.3%	18.5%	-0.6%	23%	55	62	75
TKO	TKO Group Holdings	\$13,961	87.0	0.9%	-2.9%	62.5%	19%	29	93	73
ROKU	Roku	\$13,682	-	-	14.6%	48.6%	-30%	50	56	47
PARA	Paramount Glb	\$9,164	-	1.5%	7.9%	13.7%	-28%	68	32	36
SIRI	Sirius XM Holdings	\$7,961	-	4.6%	9.6%	-29.0%	-29%	77	27	42

PROFITABILITY SUMMARY

	DIS	Industry	S&P 500
Quality Score	79	50	76
Gross Margin	37.1%	36.8%	31.6%
Operating Margin	14.6%	11.7%	15.1%
Net Margin	9.5%	-0.1%	11.2%
Return on Assets	4.5%	8.4%	10.9%
Return on Equity	8.5%	17.3%	34.6%
ROIC	7.4%	16.3%	24.8%


RETURNS SUMMARY

	DIS	Industry	S&P 500
Sentiment Score	88	53	56
5-Day Return	1.3%	-0.7%	0.6%
1-Month Return	3.5%	0.3%	5.6%
YTD Return	9.5%	22.1%	7.7%
1-Year Return	26.5%	49.3%	15.0%
3-Year Return	29.0%	122.0%	71.5%
5-Year Return	4.0%	62.8%	109.8%
Beta 1-Year	1.00	0.81	1.00

Dividend Adjusted Return Jul 18, 2024 - Jul 18, 2025

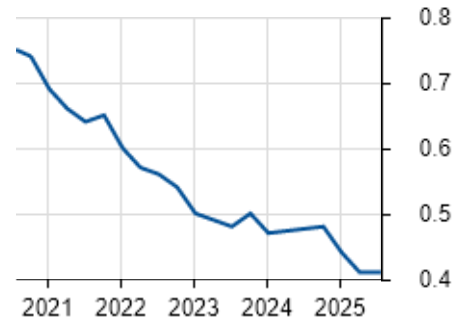
DIS 122.16 (+25.0%)

DIVIDEND

	DIS	Industr
Forward Dividend Yield	0.8%	0.5%
Payout Ratio	19.4%	10.9%
TTM Yield	0.8%	
Fwd. Div. Per Share	\$1.00	\$0.3
Div. 1Y Chg (%)	-	36.0%
Div. 3Y Avg (%)	-	34.8%
Div. 5Y Avg (%)	-10.7%	-13.0%
Cons. Growth Years	1	
Div. Coverage Ratio	4.9	33.

DEBT & EQUITY

Current Ratio	0.7
Quick Ratio	0.6
Price	\$121.42
Net Cash Per Share	-\$20.43
Equity Per Share	\$58.04
Debt / Equity	0.4
Solvency Ratio	20%
Interest Coverage	6.4
Short % of Float	1.1%
Altman Z-Score	2.5

Debt / Equity 0.4

ANALYST REVISIONS

Current Quarter EPS		Next Quarter EPS	
# Up Last 30 days	0.00	# Up Last 30 days	0.00
# Down Last 30 days	0.00	# Down Last 30 days	1.00
Mean Estimate	1.44	Mean Estimate	1.09
% Change (30 Days)	0.06%	% Change (30 Days)	-0.86%

MEAN ESTIMATE TREND

	Cur Qtr	Next Qtr	Cur Year	Next Year
Latest	\$1.44	\$1.09	\$5.77	\$6.28
30 Days Ago	\$1.44	\$1.10	\$5.79	\$6.28
90 Days Ago	\$1.44	\$1.09	\$5.49	\$6.15
% Change (90 Days)	-0.5%	0.3%	5.1%	2.1%

EARNINGS SURPRISES

Earnings surprise is the difference between a company's announced earnings and the average analyst estimated value. Surprises typically causes the stock price to jump and are often followed by more of the same surprise type.

Surprise Detail (Last 6 Quarters)

Surprise Summary (Last 12 Quarters)

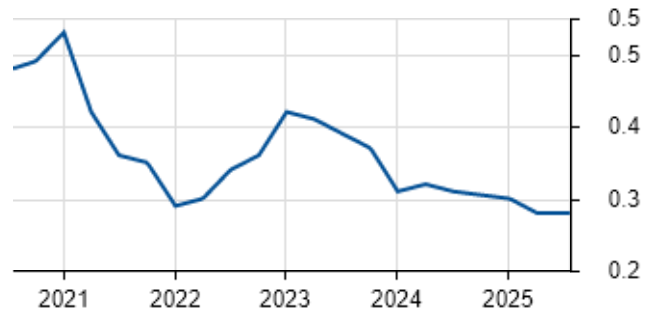
Surprise Type	Amount	Percent
Positive Quarters (> 2%)	10	83.3%
Negative Quarters (< 2%)	1	8.3%
In-Line Quarters (within 2%)	1	8.3%

Surprise Type	Announce Date	Period End Date	Actual EPS	Est. EPS	Surprise (%)
Positive	05/07/25	03/31/25	\$1.45	\$1.20	20.8%
Positive	02/05/25	12/31/24	\$1.76	\$1.45	21.4%
Positive	11/14/24	09/30/24	\$1.14	\$1.10	3.6%
Positive	08/07/24	-	\$1.39	\$1.19	16.8%
Positive	05/07/24	-	\$1.21	\$1.10	10.0%
Positive	02/07/24	-	\$1.22	\$0.99	23.2%

RISK

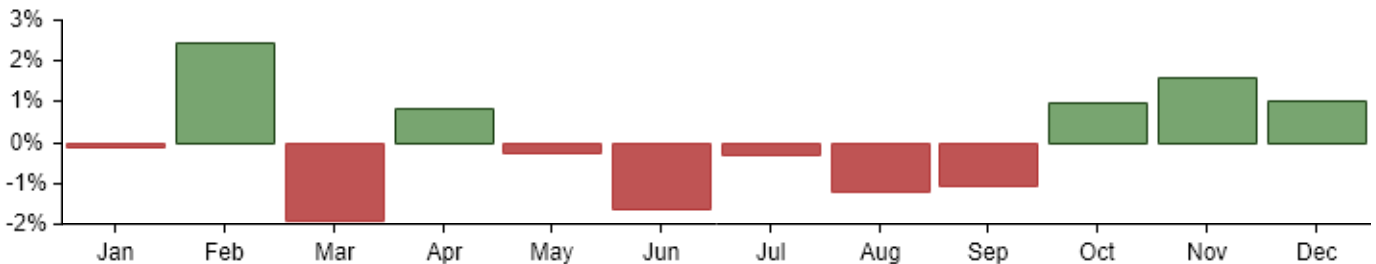
	DIS	Industry	S&P 500
Best Monthly Return (5Y)	24.9%	19.0%	9.4%
Worst Monthly Return (5Y)	-18.5%	-24.6%	-9.6%
Beta 1-Year	1.00	0.81	1.00
Volatility 1-Year	0.30	0.22	0.19
Volatility 1Y Pctl.	28	-	-
Max Drawdown 1-Year	-30.2%	-23.8%	-18.7%
Max Drawdown 3-Year	-36.5%	-32.1%	-18.7%
Max Drawdown 5-Year	-60.7%	-62.4%	-24.6%

DIS Volatility 1-Year 0.2



SEASONALITY

Seasonal Performance vs the S&P 500



5-YEAR RELATIVE PERFORMANCE VS S&P 500

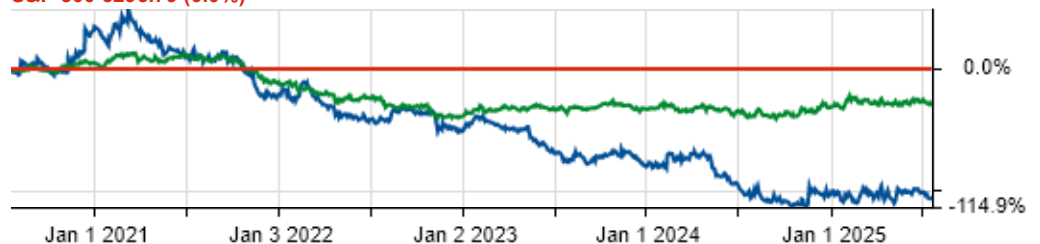
Relative to the S&P 500 baseline, DIS has underperformed the S&P 500 by -107.0% in the past 5 Years.

DIS has underperformed its sector by -77.7% in the past 5 Years.

The Communication Services sector has underperformed the market by -29.3% in the past 5 Years.

Dividend Adjusted Return Jul 17, 2020 - Jul 18, 2025

DIS 121.42 (-107.0%) Communication Services 170.38 (-29.3%)
S&P 500 6296.79 (0.0%)



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Overall Rating
vs. Peers






98

Ratings scores are relative to industry groups. They compare key metrics to rank stocks vs. their competitors. For example, higher growth than peers will score high even when the absolute growth is below the market average.











Growth vs Peers

Ticker	Company	Growth Rating vs. Peer	Sales QoQ Chg.	Eps QoQ Chg.	Sales Growth Next Y.	Sales 1Y Chg (%)	Sales 3Y Avg (%)	Sales 5Y Avg (%)
FOXA	Fox	97	26.8%	-46.4%	-3.6%	15.2%	4.8%	5.5%
NFLX	Netflix	96	12.5%	25.2%	12.1%	10.7%	9.0%	12.2%
DIS	Walt Disney	93	7.0%	-	5.4%	4.5%	5.1%	6.1%
LYV	Live Nation Entertain...	80	-11.0%	-	8.9%	-4.5%	25.0%	22.9%
WBD	Warner Bros. Discov...	73	-9.8%	-	1.1%	-4.0%	25.6%	28.9%

Valuation vs Peers

Ticker	Company	Valuation Rating vs. Peer	P/E	Fwd. P/E	PEG Trailing	P/S	P/B	5Y P/E Range
DIS	Walt Disney	86	24.8	19.3	0.6	2.4	2.1	16.7  -
FOXA	Fox	73	13.9	13.3	0.7	1.6	2.2	9.5  20.4
WBD	Warner Bros. Discov...	38	-	-	-	0.8	0.9	5.6  -
NFLX	Netflix	30	51.6	39.2	1.8	12.7	20.6	14.8  112.2
LYV	Live Nation Entertain...	19	51.0	53.1	-	1.6	333.3	40.3  -

Efficiency vs Peers

Ticker	Company	Efficiency Rating vs. Peer	Gross Margin	Operating Margin	Net Margin	5Y ROE Range	5Y ROA Range
NFLX	Netflix	98	46.9%	27.7%	23.1%	18.6%  38.6%	7.5%  18.2%
FOXA	Fox	89	0.0%	19.0%	11.6%	8.2%  19.3%	3.7%  9.8%
DIS	Walt Disney	82	37.1%	14.6%	9.5%	-5.9%  8.5%	-2.4%  4.5%
LYV	Live Nation Entert...	67	25.5%	4.3%	4.3%	-1841.9%  653.7%	-16.5%  4.9%
WBD	Warner Bros. Discov...	23	42.5%	0.9%	-28.2%	-34.3%  11.8%	-10.0%  4.3%

Financial Strength vs Peers

Ticker	Company	Financial Str. Rating vs. Peers	Debt / Equity	Interest Coverage	Quick Ratio	Intangibles %	Solvency Ratio	Short % of Float
NFLX	Netflix	98	0.6	15.5	1.2	61.5%	106%	1.7%
DIS	Walt Disney	94	0.4	6.4	0.6	42.6%	20%	1.1%
FOXA	Fox	83	0.7	7.2	2.3	28.5%	20%	8.2%
WBD	Warner Bros. Discov...	59	1.1	-4.6	0.8	74.4%	18%	5.3%
LYV	Live Nation Entertain...	32	78.3	3.5	1.0	18.8%	8%	10.9%

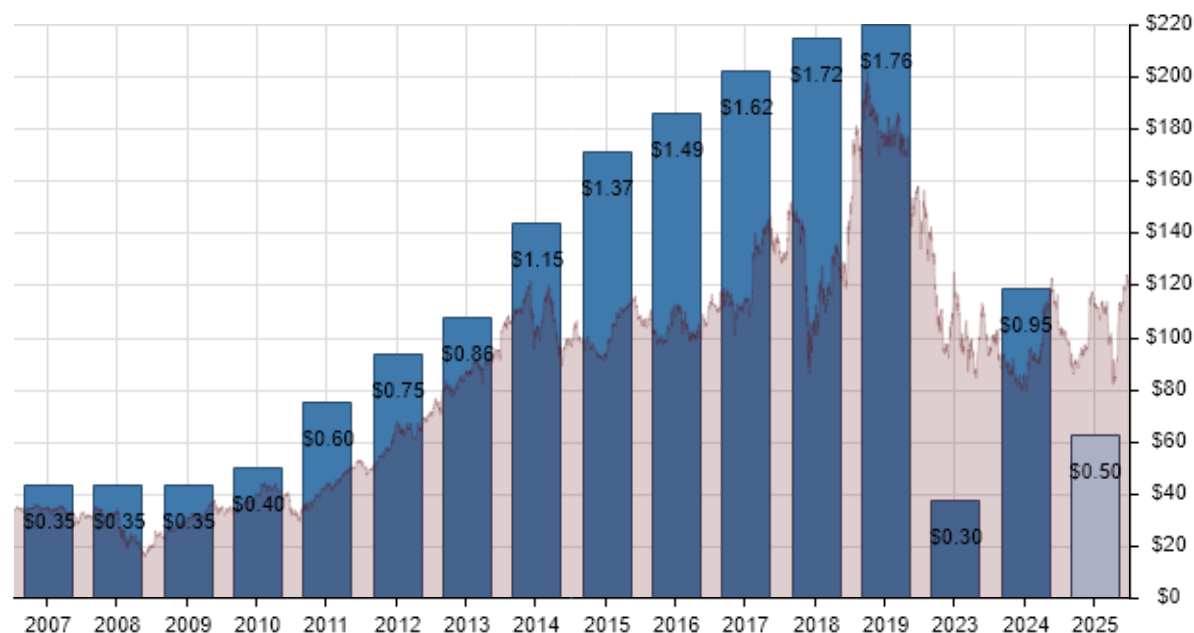
Dividends vs Peers

Ticker	Company	Dividends Rating vs. Peer	Fwd. Yield	TTM Yield	Price	Fwd. Div. Per Share	Consecutive Div. Growth Years	Payout Ratio
DIS	Walt Disney	43	0.8%	0.8%	\$121.42	\$1.00	1	19.4%
FOXA	Fox	28	1.0%	1.0%	\$56.25	\$0.54	4	13.3%
LYV	Live Nation Entertain...	-	-	-	\$150.49	-	0	-
NFLX	Netflix	-	-	-	\$1,209.24	-	0	-
WBD	Warner Bros. Discov...	-	-	-	\$12.75	-	0	-

Momentum vs Peers

Ticker	Company	Momentum Rating vs. Peer	1M Return	3M Return	6M Return	YTD Return	1Y Return	Beta 1Y	Volatility 1Y	Price vs 52-wk High (%)
WBD	Warner Bros. Discov...	96	20.6%	57.2%	33.9%	20.6%	49.6%	1.65	0.55	97.8%
DIS	Walt Disney	83	3.5%	43.8%	13.9%	9.5%	26.5%	1.00	0.30	97.4%
NFLX	Netflix	80	-1.1%	24.3%	40.9%	35.7%	88.1%	0.96	0.32	90.2%
FOXA	Fox	78	2.8%	17.3%	17.8%	16.3%	53.4%	0.77	0.26	95.8%
LYV	Live Nation Entertain...	74	1.5%	18.3%	11.0%	16.2%	58.9%	1.02	0.29	95.4%

DIVIDEND DETAIL



CALENDAR YEAR DIVIDEND HISTORY

Year	Ex-Dividend	Pay Date	Text	Amount
2025 Dividends				\$0.50
	06/24/25	07/23/25	Regular	\$0.50
2024 Dividends				\$0.95
	12/16/24	01/16/25	Regular	\$0.50
	07/08/24	07/25/24	Regular	\$0.45
2023 Dividends				\$0.30
	12/08/23	01/10/24	Regular	\$0.30
2019 Dividends				\$1.76
	12/13/19	01/16/20	Regular	\$0.88
	07/05/19	07/25/19	Regular	\$0.88
2018 Dividends				\$1.72
	12/07/18	01/10/19	Regular	\$0.88
	07/06/18	07/26/18	Regular	\$0.84
2017 Dividends				\$1.62
	12/08/17	01/11/18	Regular	\$0.84
	07/06/17	07/27/17	Regular	\$0.78
2016 Dividends				\$1.49
	12/08/16	01/11/17	Regular	\$0.78
	07/07/16	07/28/16	Regular	\$0.71
2015 Dividends				\$1.37
	12/10/15	01/11/16	Regular	\$0.71
	07/01/15	07/29/15	Regular	\$0.66
2014 Dividends				\$1.15
	12/11/14	01/08/15	Regular	\$1.15

UPCOMING DIVIDEND

Ex-Dividend Date	06/24/25
Payment Date	07/23/25
Amount	\$0.50
Type	Regular

DIVIDEND RATE

Regular Dividend	\$0.50
Forward Dividend Rate	\$1.00
Forward Dividend Yield	0.8%
Trailing 12 Months Dividends	\$1.00
Trailing 12 Months Yield	0.8%

STATISTICS

Payout Ratio	19.3
Dividend Coverage Ratio	4.9
Consecutive Growth Years	1
3 Year Growth Rate	-
5 Year Growth Rate	-10.7%
10 Year Growth Rate	-3.1%


FINANCIAL STATEMENT SUMMARY

USD in Millions	Chart	2020	2021	2022	2023	2024	TTM	CAGR
Income Statement								
Revenue		60,760	72,988	84,415	88,935	92,502	94,040	10.1%
Operating Income		1,218	5,596	6,567	9,935	13,056	13,683	70.3%
Net income		-4,954	3,082	3,320	2,986	5,615	8,910	34.9%
Earnings per share diluted		-\$2.72	\$1.72	\$1.82	\$1.63	\$3.08	\$4.90	34.4%
Average shares diluted		1,810	1,829	1,827	1,832	1,827	1,820	0.1%
P/E Ratio		-114.9	138.9	49.8	69.9	41.0	24.8	-38.5%
Balance Sheet								
Cash		17,068	14,444	8,470	7,192	5,486	5,852	-21.0%
Current assets		34,874	32,913	26,912	25,971	23,667	22,735	-9.0%
Net Property, Plant and Equipm...		32,263	32,681	34,200	35,321	38,140	39,095	4.3%
Working Capital		8,328	2,876	-158	-5,062	-11,179	-11,294	-
Net Debt		41,207	39,688	39,907	40,498	39,822	37,037	-2.3%
Stockholders' Equity		84,071	89,864	96,149	100,721	101,933	104,339	4.9%
Cash Flow								
Operating Cash Flow		6,091	5,282	5,237	13,025	14,991	18,078	27.0%
Cap Ex		-3,444	-3,799	-5,143	-5,087	-6,579	-7,182	17.6%
Free Cash Flow		2,647	1,483	94	7,938	8,412	10,896	36.5%
Free Cash Flow per share		\$1.46	\$0.81	\$0.05	\$4.33	\$4.60	\$5.99	36.4%
Profitability								
Operating Margin		2.0%	7.7%	7.8%	11.2%	14.1%	14.6%	54.7%
Return on Assets		-2.4%	1.5%	1.6%	1.5%	2.8%	4.5%	36.0%
Return on Equity		-5.9%	3.4%	3.5%	3.0%	5.5%	8.5%	29.3%
Return on Invested Capital		-2.3%	3.2%	3.4%	3.4%	5.2%	7.4%	26.9%
Dividends								
Dividends Per Share		\$0.00	\$0.00	\$0.00	\$0.30	\$0.95	\$1.00	118.0%
Dividend Yield		0.0%	0.0%	0.0%	0.7%	0.9%	0.8%	15.4%
Dividend Growth		-	0.0%	0.0%	0.0%	216.7%	233.3%	14.6%
Dividend Coverage		-	0.0	0.0	5.4x	3.3x	5.2x	-3.2%


VALUATION & PROFITABILITY HISTORY

Date →		TTM	1 Yr Ago	2 Yrs. Ago	3 Yrs. Ago	4 Yrs. Ago
Price / Earnings		24.8	104.8	38.2	64.6	-
Price / Cash Flow		12.2	13.2	23.4	30.9	75.6
Price / Book		2.1	1.8	1.6	1.9	3.8
Price / Tangible B...		10.4	12.7	25.8	-	-
Price / Sales		2.4	2.0	1.8	2.3	5.6
EV / EBITDA		14.3	14.8	17.5	18.4	43.5
Forward Dividend...		0.8%	0.9%	0.0%	0.0%	0.0%
Shareholder Yield		2.6%	0.9%	0.0%	0.0%	0.0%
Gross Margin		37.1%	35.4%	32.8%	34.4%	31.1%
Net Margin		9.5%	5.3%	2.6%	3.9%	1.8%
Return on Assets		4.5%	2.4%	1.1%	1.6%	0.6%
Return on Equity		8.5%	4.8%	2.3%	3.4%	1.3%
ROIC		7.4%	4.6%	2.9%	3.2%	2.0%

WARNINGS

Name	Severity	Details
High Goodwill	Medium 	Goodwill %: 37.4%

Goodwill on a company's balance often results from over-paying to acquire other firms. A high percentage here can turn into impairment charges that weigh down future earnings for the company.

Declining Sales Growth	Low 	Sales 1Y Chg (%): 4.5%; Sales 3Y Avg (%): 5.1%; Sales 5Y Avg (%): 6.1%
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Sales growth has declined. Comparing revenue growth rates, the 1-year is less than the 3-year which is less than the 5-year. Be sure to understand the reasons as declining sales growth puts pressure on the stock price.

REPORT TIPS

Metric Definitions

Metric descriptions are available at stockrover.com/help/metrics/metric-overview

Quantitative Scores

Our scores analytics is to offer our concise analysis of a stock in powerful, but easy to digest format. Each of the composite score metrics are designed to use the best available accounting practices as well as source data from SEC filings. The scores are computed for a company vs. the market as a whole.

Fair Value

Fair value performs a forecasted discounted cash flow analysis of a company to determine the company's intrinsic value based on the expected future cash flows the company will produce. It basically determines what a company is worth based on how much cash flow it is expected to generate for you in the future,

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