

Nike (NKE)

Consumer Cyclical / Footwear & Accessories

StockRover

Stock Report | July 19, 2025

\$72.47 **-\$0.51 (-0.70%)** as of Friday's close

Cap (\$M USD)
\$107,031

P/E
33.6

EPS (1Y)
-42.1%

Dividend
\$1.60

Last Filing
05/30/25

52-wk Range
\$52.28  \$90.62

Sales (\$M)
46,309

Fwd. P/E
29.1

Sales (1Y)
-9.8%

Fwd. Yield
2.2%

Next Earnings
10/07/25

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

NKE 72.47 (+1.3%)

Consumer Cyclical 370.29 (+14.5%)

S&P 500 6296.79 (+14.1%)



NKE has underperformed the S&P 500 by -12.8% in the past year.

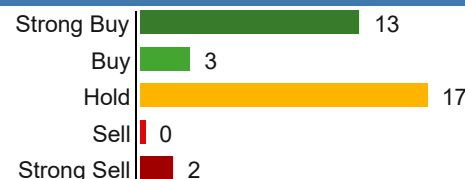
NKE has underperformed its sector by -13.2% in the past year.

The Consumer Cyclical sector has performed nearly in line with the market over the past year.

ANALYST CONSENSUS

Buy

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



QUANTITATIVE SCORES

Fair Value \$55.17

Margin of Safety **-24%**

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

6 warnings
Details on Page 8

Value Score

64

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

59

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

56

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

18

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

Nike is the largest athletic footwear and apparel brand in the world. Key categories include basketball, running, and football (soccer). Footwear generates about two thirds of its sales. Its brands include Nike, Jordan (premium athletic footwear and clothing), and Converse (casual footwear). Nike sells products worldwide through company-owned stores, franchised stores, and third-party retailers. The firm also operates e-commerce platforms in more than 40 countries. Nearly all its production is outsourced to contract manufacturers in more than 30 countries. Nike was founded in 1964 and is based in Beaverton, Oregon.

Employees 77,800

Homepage www.nike.com

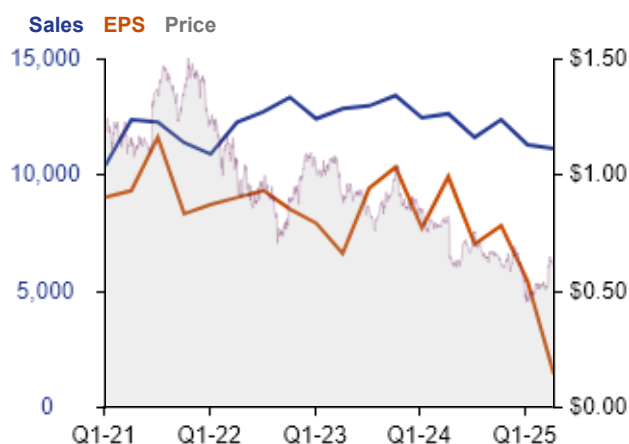
Headquarters Beaverton, OR

VALUATION SUMMARY

	NKE	Industry	S&P 500
Value Score	64	63	70
Price / Earnings	33.6	27.4	30.0
Price / Sales	2.3	1.7	3.3
Price / Free Cash Flow	33.0	24.3	40.3
Price / Book	8.1	4.6	5.5
Price / Tangible Book	8.4	36.9	500+
EV / EBITDA	24.1	21.1	25.2
EPS Predict. Pctl.	80	57	71
Piotroski F Score	4	4	6
5-Year P/E Range	19.7		87.3
5-Year P/B Range	5.9		26.3
5-Year P/S Range	1.7		6.4


GROWTH SUMMARY

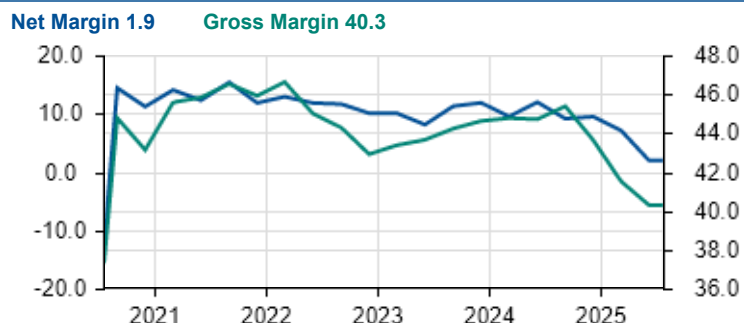
	NKE	Industry	S&P 500
Growth Score	56	63	76
Sales Growth			
Sales Growth Next Year	5.3%	7.4%	10.5%
Sales 1-Year Chg (%)	-9.8%	-4.0%	7.3%
Sales 3-Year Avg (%)	-0.3%	-8.0%	7.9%
Sales 5-Year Avg (%)	4.4%	-1.5%	11.1%
EPS Growth			
Next Yr. Growth Est.	45.4%	25.6%	14.3%
EPS 1-Year Chg (%)	-42.1%	10.0%	10.1%
EPS 3-Year Avg (%)	-16.8%	-5.0%	7.7%
EPS 5-Year Avg (%)	6.2%	12.9%	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
NKE	Nike	\$107,031	33.6	2.2%	21.8%	2.3%	-24%	64	56	59
ADD...	adidas	\$42,808	36.0	0.9%	5.9%	-6.4%	5%	65	92	80
HM...	Hennes & Mauritz	\$22,441	21.4	4.6%	0.0%	-12.4%	-6%	81	58	81
ASC...	ASICS	\$17,746	37.9	0.7%	2.3%	55.5%	-6%	36	97	94
RL	Ralph Lauren	\$17,535	24.9	1.3%	8.5%	75.1%	-13%	62	90	92
ONON	On Holding	\$17,323	67.6	-	2.4%	32.4%	-7%	47	82	93
DECK	Deckers Outdoor	\$15,229	16.1	-	0.9%	-31.1%	7%	78	95	99
TRYIF	Toray Industries	\$10,643	20.7	2.0%	2.3%	55.9%	4%	61	81	59
SKX	Skechers USA	\$9,436	15.1	-	1.0%	-1.9%	-22%	74	88	61
BIRK	Birkenstock Holding	\$9,140	31.7	-	-5.4%	-7.3%	29%	37	-	85
LEVI	Levi Strauss	\$8,273	19.9	2.7%	18.7%	17.4%	-8%	69	81	84
CROX	Crocs	\$5,897	6.5	-	5.0%	-20.0%	17%	91	83	95

PROFITABILITY SUMMARY

	NKE	Industry	S&P 500
Quality Score	59	67	76
Gross Margin	42.7%	46.9%	31.6%
Operating Margin	8.0%	9.1%	15.1%
Net Margin	7.0%	6.7%	11.2%
Return on Assets	8.6%	8.3%	10.9%
Return on Equity	24.4%	23.0%	34.6%
ROIC	12.7%	13.9%	24.8%


RETURNS SUMMARY

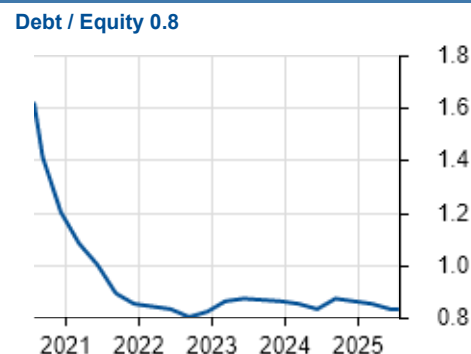
	NKE	Industry	S&P 500
Sentiment Score	18	41	56
5-Day Return	-0.2%	-0.6%	0.6%
1-Month Return	21.8%	12.2%	5.6%
YTD Return	-3.1%	-7.1%	7.7%
1-Year Return	2.3%	-1.7%	15.0%
3-Year Return	-26.9%	-6.0%	71.5%
5-Year Return	-19.8%	-11.0%	109.8%
Beta 1-Year	0.97	0.85	1.00


DIVIDEND

	NKE	Industry
Forward Dividend Yield	2.2%	1.5%
Payout Ratio	72.4%	39.1%
TTM Yield	2.2%	-
Fwd. Div. Per Share	\$1.60	\$0.88
Div. 1Y Chg (%)	8.1%	-14.1%
Div. 3Y Avg (%)	9.5%	-12.9%
Div. 5Y Avg (%)	10.3%	-11.4%
Cons. Growth Years	10+	0
Div. Coverage Ratio	1.4	2.4

DEBT & EQUITY

Current Ratio	2.2
Quick Ratio	1.5
Price	\$72.47
Net Cash Per Share	-\$1.27
Equity Per Share	\$8.95
Debt / Equity	0.8
Solvency Ratio	19%
Short % of Float	3.9%
Altman Z-Score	4.7


ANALYST REVISIONS

Current Quarter EPS		Next Quarter EPS	
# Up Last 30 days	2.00	# Up Last 30 days	2.00
# Down Last 30 days	6.00	# Down Last 30 days	8.00
Mean Estimate	0.26	Mean Estimate	0.51
% Change (30 Days)	-19.53%	% Change (30 Days)	-7.24%

MEAN ESTIMATE TREND

	Cur Qtr	Next Qtr	Cur Year	Next Year
Latest	\$0.26	\$0.51	\$1.71	\$2.49
30 Days Ago	\$0.33	\$0.55	\$1.95	\$2.63
90 Days Ago	\$0.36	\$0.58	\$2.08	\$2.81
% Change (90 Days)	-26.5%	-12.3%	-17.7%	-11.2%

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)

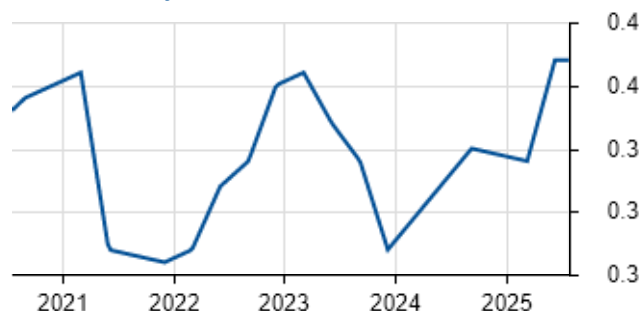
Surprise Type	Amount	Percent
Positive Quarters (> 2%)	10	83.3%
Negative Quarters (< 2%)	0	-
In-Line Quarters (within 2%)	2	16.7%

Surprise Type	Announce Date	Period End Date	Actual EPS	Est. EPS	Surprise (%)
Positive	06/26/25	05/31/25	\$0.14	\$0.13	7.7%
Positive	03/20/25	02/28/25	\$0.54	\$0.29	86.2%
Positive	12/19/24	11/30/24	\$0.78	\$0.63	23.6%
Positive	10/01/24	-	\$0.70	\$0.52	34.6%
Positive	06/27/24	-	\$1.01	\$0.83	21.7%
Positive	03/21/24	-	\$0.98	\$0.74	32.4%

RISK

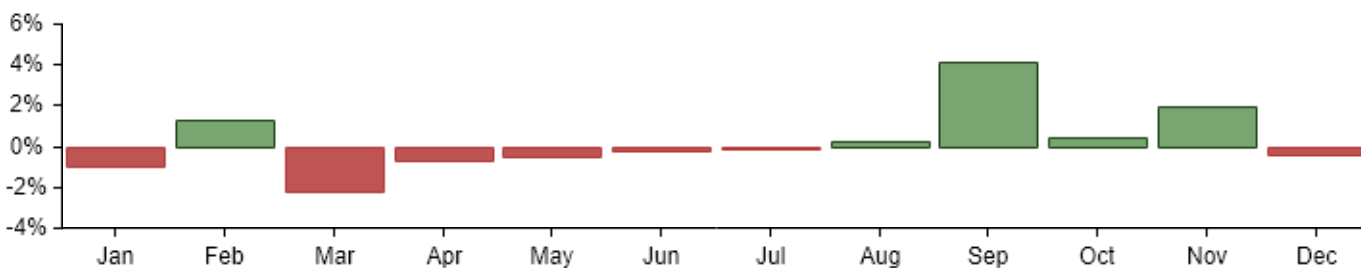
	NKE	Industry	S&P 500
Best Monthly Return (5Y)	17.0%	17.5%	9.4%
Worst Monthly Return (5Y)	-21.9%	-19.8%	-9.6%
Beta 1-Year	0.97	0.85	1.00
Volatility 1-Year	0.39	0.27	0.19
Volatility 1Y Pctl.	39	-	-
Max Drawdown 1-Year	-39.8%	-37.7%	-18.7%
Max Drawdown 3-Year	-57.4%	-49.7%	-18.7%
Max Drawdown 5-Year	-68.5%	-58.3%	-24.6%

NKE Volatility 1-Year 0.4



SEASONALITY

Seasonal Performance vs the S&P 500



5-YEAR RELATIVE PERFORMANCE VS S&P 500

Relative to the S&P 500 baseline, NKE has underperformed the S&P 500 by -130.9% in the past 5 Years.

NKE has underperformed its sector by -103.6% in the past 5 Years.

The Consumer Cyclical sector has underperformed the market by -27.3% in the past 5 Years.

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



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Overall Rating
vs. Peers






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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 (%)
DECK	Deckers Outdoor	94	6.5%	21.2%	8.3%	12.4%	15.2%	18.4%
ONON	On Holding	87	43.0%	-39.3%	24.6%	26.6%	39.4%	-
SKX	Skechers USA	82	7.1%	0.8%	8.0%	8.7%	9.9%	14.4%
NKE	Nike	15	-12.0%	-85.9%	5.3%	-9.8%	-0.3%	4.4%
BIRK	Birkenstock Holding	4	19.3%	47.4%	15.7%	13.5%	-	-

Valuation vs Peers

Ticker	Company	Valuation Rating vs. Peer	P/E	Fwd. P/E	PEG Trailing	P/S	P/B	5Y P/E Range
SKX	Skechers USA	75	15.1	16.9	0.4	1.1	2.1	6.8  81.3
DECK	Deckers Outdoor	63	16.1	15.2	0.5	3.1	6.1	15.0  41.2
BIRK	Birkenstock Holding	39	31.7	23.2	-	4.1	2.8	26.8  140.1
ONON	On Holding	23	67.6	41.1	-	11.0	9.5	47.9  -
NKE	Nike	4	33.6	29.1	5.4	2.3	8.1	19.7  87.3

Efficiency vs Peers

Ticker	Company	Efficiency Rating vs. Peer	Gross Margin	Operating Margin	Net Margin	5Y ROE Range	5Y ROA Range
DECK	Deckers Outdoor	99	57.9%	23.7%	19.4%	24.0%  39.4%	17.1%  28.8%
NKE	Nike	89	42.7%	8.0%	7.0%	24.4%  44.9%	8.6%  17.2%
SKX	Skechers USA	73	53.0%	9.5%	7.0%	4.0%  22.8%	1.8%  12.6%
ONON	On Holding	70	60.6%	9.9%	8.2%	-20.1%  17.4%	-21.0%  12.2%
BIRK	Birkenstock Holding	49	59.0%	25.8%	12.9%	3.1%  9.0%	1.6%  5.1%

Financial Strength vs Peers

Ticker	Company	Financial Str. Rating vs. Peers	Debt / Equity	Interest Coverage	Quick Ratio	Intangibles %	Solvency Ratio	Short % of Float
ONON	On Holding	99	0.2	14.6	2.2	2.3%	34%	7.4%
DECK	Deckers Outdoor	94	0.1	354.5	3.1	0.8%	104%	6.9%
NKE	Nike	65	0.8	-	1.5	1.4%	19%	3.9%
SKX	Skechers USA	46	0.5	-	1.3	1.1%	25%	3.9%
BIRK	Birkenstock Holding	39	0.5	5.0	1.0	64.4%	21%	17.3%

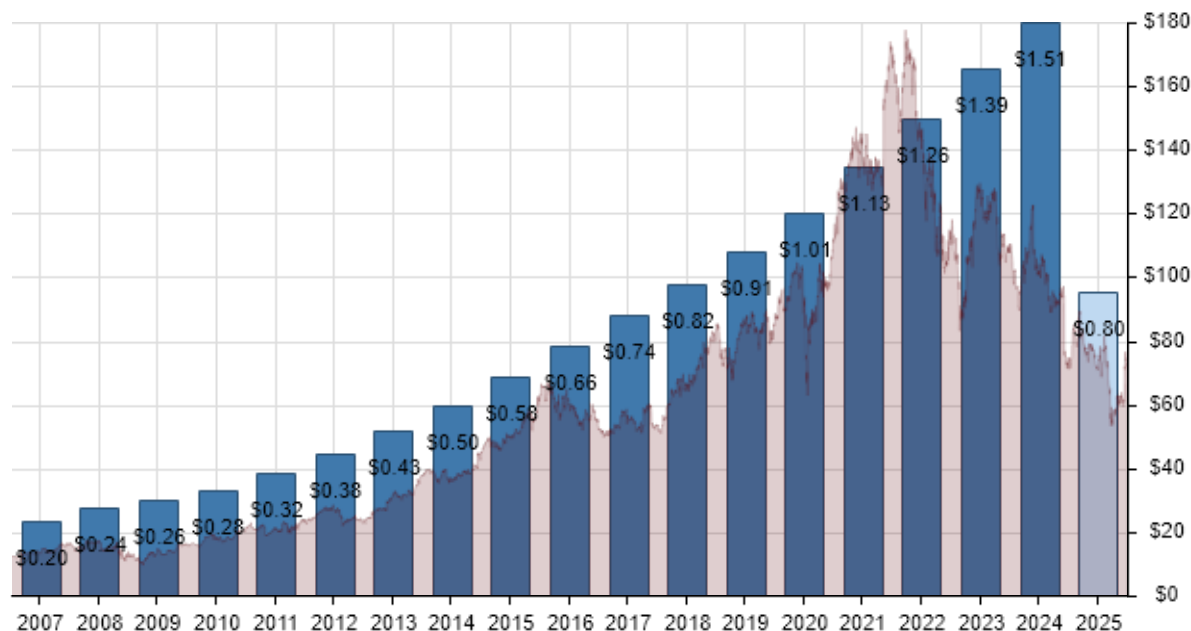
Dividends vs Peers

Ticker	Company	Dividends Rating vs. Peer	Fwd. Yield	TTM Yield	Price	Fwd. Div. Per Share	Consecutive Div. Growth Years	Payout Ratio
NKE	Nike	41	2.2%	2.2%	\$72.47	\$1.60	10+	72.4%
BIRK	Birkenstock Holding	-	-	-	\$49.70	-	0	-
DECK	Deckers Outdoor	-	-	-	\$101.91	-	0	-
ONON	On Holding	-	-	-	\$53.12	-	0	-
SKX	Skechers USA	-	-	-	\$63.08	-	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 (%)
NKE	Nike	74	21.8%	30.8%	3.5%	-3.1%	2.3%	0.97	0.39	80.0%
ONON	On Holding	62	2.4%	25.0%	-8.4%	-3.0%	32.4%	1.43	0.47	82.9%
SKX	Skechers USA	47	1.0%	32.4%	-9.8%	-6.2%	-1.9%	1.00	0.45	80.0%
BIRK	Birkenstock Holding	18	-5.4%	4.5%	-17.1%	-12.3%	-7.3%	1.12	0.39	76.7%
DECK	Deckers Outdoor	13	0.9%	-3.6%	-51.5%	-49.8%	-31.1%	1.45	0.53	45.5%

DIVIDEND DETAIL



CALENDAR YEAR DIVIDEND HISTORY

Year	Ex-Dividend	Pay Date	Text	Amount
2025 Dividends				\$0.80
	06/02/25	07/01/25	Regular	\$0.40
	03/03/25	04/01/25	Regular	\$0.40
2024 Dividends				\$1.51
	12/02/24	01/02/25	Regular	\$0.40
	09/03/24	10/01/24	Regular	\$0.37
	06/03/24	07/01/24	Regular	\$0.37
	03/01/24	04/01/24	Regular	\$0.37
2023 Dividends				\$1.39
	12/01/23	01/02/24	Regular	\$0.37
	09/01/23	10/02/23	Regular	\$0.34
	06/02/23	07/05/23	Regular	\$0.34
	03/03/23	04/03/23	Regular	\$0.34
2022 Dividends				\$1.25
	12/02/22	12/28/22	Regular	\$0.34
	09/02/22	10/03/22	Regular	\$0.30
	06/03/22	07/01/22	Regular	\$0.30
	03/04/22	04/01/22	Regular	\$0.30
2021 Dividends				\$1.13
	12/03/21	12/28/21	Regular	\$0.30
	08/27/21	10/01/21	Regular	\$0.28
	05/28/21	07/01/21	Regular	\$0.28
	02/26/21	04/01/21	Regular	\$0.28
2020 Dividends				\$1.01

UPCOMING DIVIDEND

Ex-Dividend Date	06/02/25
Payment Date	07/01/25
Amount	\$0.40
Type	Regular

DIVIDEND RATE

Regular Dividend	\$0.40
Forward Dividend Rate	\$1.60
Forward Dividend Yield	2.2%
Trailing 12 Months Dividends	\$1.57
Trailing 12 Months Yield	2.2%

STATISTICS

Payout Ratio	72.4
Dividend Coverage Ratio	1.4
Consecutive Growth Years	10+
3 Year Growth Rate	9.5%
5 Year Growth Rate	10.3%
10 Year Growth Rate	11.1%







FINANCIAL STATEMENT SUMMARY

USD in Millions	Chart	2020	2021	2022	2023	2024	TTM	CAGR
Income Statement								
Revenue		38,254	46,306	49,107	51,542	48,978	46,309	4.3%
Operating Income		3,698	7,169	6,379	6,062	5,475	3,702	0.0%
Net income		2,826	6,169	5,634	5,299	4,886	3,219	2.9%
Earnings per share diluted		\$1.77	\$3.81	\$3.54	\$3.43	\$3.24	\$2.16	4.5%
Average shares diluted		1,595	1,618	1,591	1,549	1,509	1,488	-1.5%
P/E Ratio		84.0	44.2	33.2	33.5	21.7	33.6	-18.3%
Balance Sheet								
Cash		11,812	15,103	10,621	9,927	9,761	9,151	-5.5%
Current assets		23,607	27,177	27,447	24,631	24,980	23,362	-0.2%
Net Property, Plant and Equipm...		8,045	7,829	7,663	8,096	7,593	7,540	-1.4%
Working Capital		14,736	18,320	17,248	15,632	13,734	12,796	-3.1%
Net Debt		993	-2,380	1,904	2,250	2,304	1,867	14.9%
Stockholders' Equity		10,640	14,924	15,272	14,146	14,037	13,213	4.9%
Cash Flow								
Operating Cash Flow		4,534	7,170	2,678	7,234	6,121	3,698	-4.4%
Cap Ex		-908	-713	-896	-927	-603	-430	-15.2%
Free Cash Flow		3,626	6,457	1,782	6,307	5,518	3,268	-2.3%
Free Cash Flow per share		\$2.27	\$3.99	\$1.12	\$4.07	\$3.66	\$2.20	-0.8%
Profitability								
Operating Margin		9.7%	15.5%	13.0%	11.8%	11.2%	8.0%	-4.1%
Return on Assets		9.5%	16.9%	14.2%	13.8%	13.0%	8.6%	-2.2%
Return on Equity		26.6%	41.3%	36.9%	37.5%	34.8%	24.4%	-1.9%
Return on Invested Capital		12.9%	23.2%	20.7%	20.1%	18.7%	12.7%	-0.3%
Dividends								
Dividends Per Share		\$1.01	\$1.13	\$1.25	\$1.39	\$1.51	\$1.60	10.7%
Dividend Yield		0.8%	0.7%	1.2%	1.4%	2.1%	2.2%	25.7%
Dividend Growth		-	11.9%	11.1%	10.8%	8.6%	10.3%	-3.8%
Dividend Coverage		1.8x	3.5x	2.9x	2.5x	2.2x	1.4x	-5.6%

VALUATION & PROFITABILITY HISTORY

Date →		TTM	1 Yr Ago	2 Yrs. Ago	3 Yrs. Ago	4 Yrs. Ago
Price / Earnings		33.6	21.3	31.6	27.4	45.0
Price / Cash Flow		29.2	15.8	36.6	27.8	55.3
Price / Book		8.1	7.7	11.6	11.0	19.8
Price / Tangible B...		8.4	7.9	12.0	11.5	20.6
Price / Sales		2.3	2.2	3.4	3.6	5.8
EV / EBITDA		24.1	15.4	25.1	21.6	32.7
Forward Dividend...		2.2%	2.1%	1.2%	1.2%	0.7%
Shareholder Yield		5.0%	6.0%	4.5%	3.6%	0.9%
Gross Margin		42.7%	44.6%	43.5%	46.0%	44.8%
Net Margin		7.0%	11.1%	9.9%	12.9%	12.9%
Return on Assets		8.6%	15.1%	13.0%	15.5%	16.6%
Return on Equity		24.4%	39.5%	36.2%	39.6%	44.9%
ROIC		12.7%	21.7%	18.8%	22.6%	24.6%

WARNINGS

Name	Severity	Details
MACD Crossover	Low 	MACD Crossover Days: 4; MACD Divergence: -0.44
The MACD indicator has turned negative in the past week. This is a bearish signal among technical traders.		
Downward EPS Revisions	Low 	Net EPS Rev. Cur. Qtr.: -4
Analyst estimates for the next quarter have been revised down. Check for recent news stories about why the future outlook is darker.		
Declining EPS Growth	Low 	EPS 1Y Chg (%): -42.1%; EPS 3Y Avg (%): -16.8%; EPS 5Y Avg (%): 6.2%
EPS growth has declined. Comparing EPS 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 earnings growth puts pressure on the stock price.		
Declining Sales Growth	Low 	Sales 1Y Chg (%): -9.8%; Sales 3Y Avg (%): -0.3%; Sales 5Y Avg (%): 4.4%
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.		
Low Sentiment Score	Low 	Sentiment Score: 18
The sentiment score for this company is low. The stock has worse momentum than most other stocks. Contrarian investors love this sort of stock but be sure to understand why it is out of favor.		
High Short Percent	Low 	Short % of Float: 3.9%
A significant percentage of this company's shares are being shorted by investors betting against it. This shows sentiment is negative. Note that exchanges only calculate this value twice per month so it can be delayed.		

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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Additional data provided by [Zacks](#), [Intrinio](#), [Quandl](#), [Yodlee](#), [IEX Cloud](#)