

INSIDE THE Buy-Side

EARNINGS PRIMER®



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Q4'25

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INSIDE THE Buy-Side®

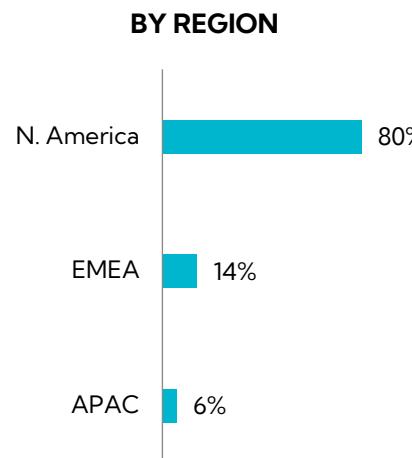
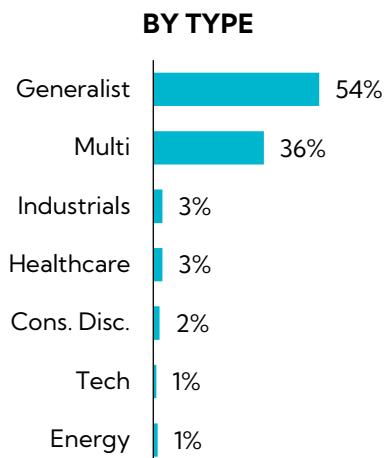
EARNINGS PRIMER®

Since 2007, we have surveyed institutional investors and analysts globally on the equity markets, world economy, and business climate. At the start of every earnings season, we publish our flagship *Inside The Buy-Side® Earnings Primer®*, which captures real-time investor sentiment and trends.

At the nexus of institutional investors and public companies globally, our thought leadership and guidance, grounded in trusted data and best practice, support outperformance.

Survey Timeframe: December 2, 2025 – January 8, 2026

Survey Scope



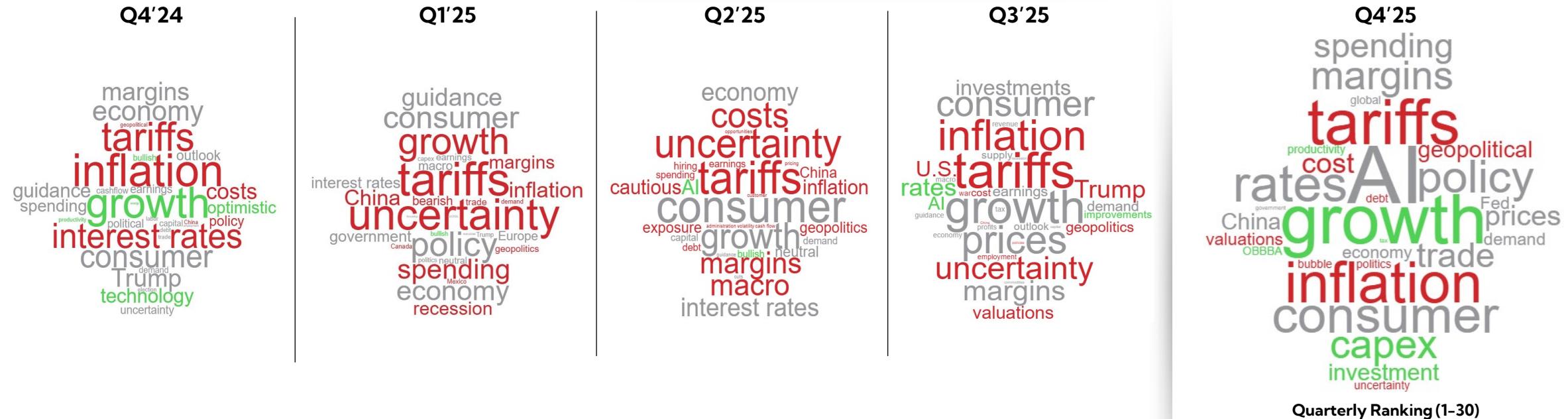
Market Performance¹

	YTD	Q4'25	Q4'24
U.S.			
DJIA	3.2%	3.6%	0.5%
NASDAQ	2.0%	2.6%	6.2%
S&P 500	1.7%	2.3%	2.1%
Russell 2000	6.2%	1.9%	0.01%
Europe			
FTSE 100	2.1%	6.2%	(0.8%)
Stoxx 600	3.1%	6.1%	(2.9%)
Asia			
Hang Seng	4.8%	(4.6%)	(5.0%)
Shanghai	4.3%	2.2%	0.5%

Growth and AI Gain Further Prominence Heading into 2026; Policy, Interest Rates, and Geopolitics Also Rise to the Forefront

While tariffs and inflation dominated much of 2024 and early 2025, Q4'25 commentary reflects escalating hunger for growth and investments; still, macro, geopolitical, and other exogenous concerns linger

VISUAL REPRESENTATION OF SURVEY COMMENTARY: UNDERLYING SENTIMENT ■ Positive ■ Neutral ■ Negative



Quarterly Ranking (1-30)

Top Mentions	Q/Q
AI	↑ 11
Growth	UNCH
Tariffs	↓ 2
Inflation	↓ 1
Rates	↑ 3

Investor Headiness for Growth Persists with Expectations Intact for 2026 Expansion; Frothy Valuations, Policy Impact, Geopolitics, and AI Bubble Curb Enthusiasm Somewhat

Investor Sentiment Remains Optimistic, Ebbing Only Slightly, with Expectations for Strong Q4'25 Revenue and Earnings Prints and 2026 Guides; Executive Tone Perceived as More Upbeat QoQ

- 50% characterize sentiment as *Neutral to Bullish* or *Bullish* versus 53% last quarter while *Neutral to Bearish* views see a slight uptick
 - Rate cuts, earnings momentum, and productivity gains drive favorable views, but optimism is tempered by stretched valuations, government policy and growing global tension, as well as percolating AI build-out / bubble concerns
- 66% of investors characterize executive tone as *Neutral to Bullish or Bullish*, up 13 points QoQ, and on par with levels registered in the Dec. 2024 survey
- More than half, 52%, expect Q4 earnings to be *Better Than* consensus, while 44% anticipate *In Line* results; only 4% expect results to be *Worse Than* consensus, the lowest level since Q2'21
- Revenue, EPS, and FCF for Q4'25 are anticipated to have *Improved*, though views are more muted for Margins
- ~60% anticipate 2026 Revenue and EPS guides to come in *Higher than* 2025 actuals
- 45% project 2026 U.S. GDP growth will be *Higher than* 2025, and a majority, 65%, do not anticipate the U.S. economy will enter a recession within the next year

Focus on Growth Continues to Outstrip that of Margins, Supported by AI, Lower Rates, and OBBBA Benefits; Still, Concerns About Fed Policy, Geopolitics, and Tariff Uncertainty Serve as Counterweights

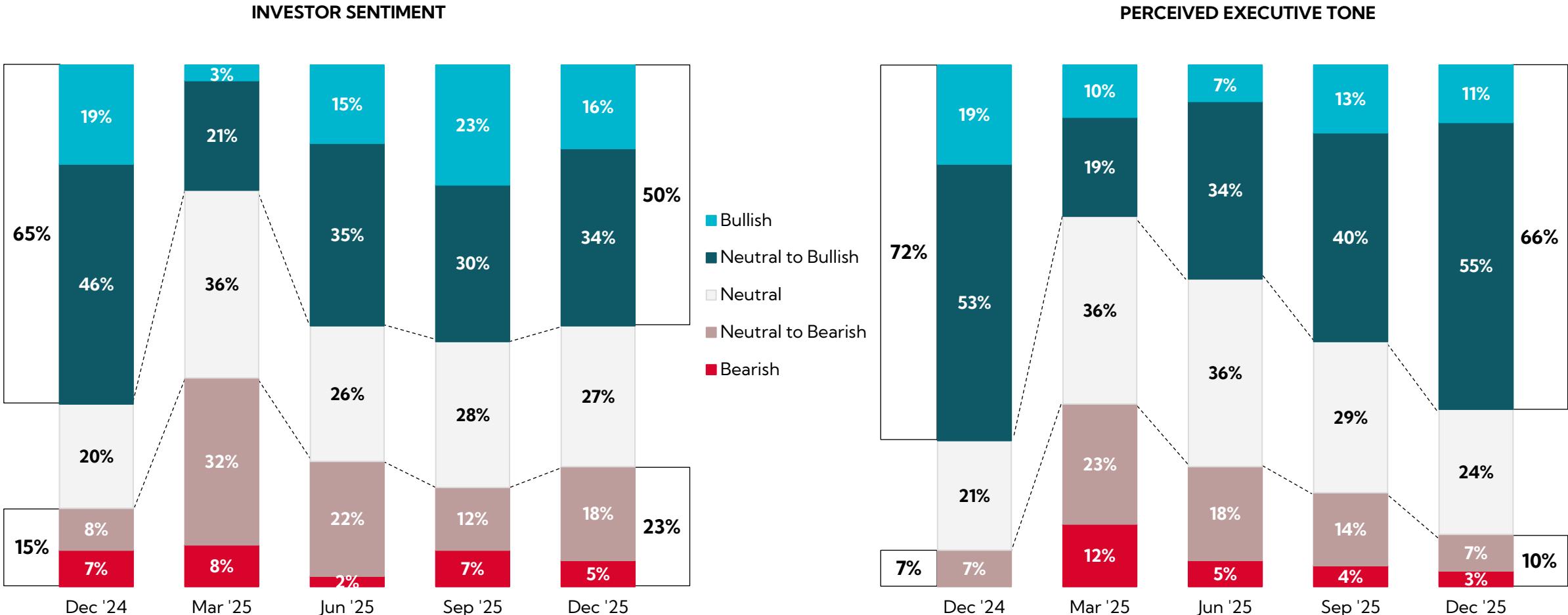
- Investors continue to prioritize Growth over Margins – 64% to 36% – roughly in line with last quarter
 - 44% expect OBBBA to have a *Positive Impact* on financial performance over the next six months
- AI is the leading earnings call topic of interest with investors seeking details on strategy, focus areas, impact through use cases, capex, and ROI
- Policy Impacts (49%) and Geopolitics (45%) top the list of unaided concerns, with the latter seeing a surge QoQ; AI Impact, Interest Rates, and Inflation round out the top five and while tariffs are still on the board, they see a significant drop from the top spot
 - Regarding tariffs, 75% report already seeing or expect to see companies face the greatest financial impact in the next six months
 - Over half believe tariffs in 2026 will *Stay the Same* relative to last year; almost half also are *Somewhat Confident* in mitigation strategies, placing emphasis on company pricing power and agility

Reinvestment Catapults to the Most Preferred Use of Cash for the First Time in a Year; Financials and Healthcare Surpass Tech as the Most In-favor Sectors, While India and China See More Bullish Views

- Reinvestment cited as top use by 61%, up from 41% last quarter, followed by buybacks at 44%
 - Debt paydown preference decreases to lowest level since Dec. 2021, though leverage thresholds remain conservative
- Strong support remains for bolt-on M&A, with 71% in favor; large / transformational acquisitions see a slight bump but still receive mostly downbeat views
 - 84% report *Overpaying* as their biggest concern, followed by *Integration Risk* and *Regulatory Uncertainty*, with the latter increasing 2x from last quarter
- India continues to see the most positive outlook over the next six months, followed by China and S.E. Asia
 - While 66% of investors continue to assign *Very High* to *High* risk to companies with business / operation exposure to China, this is lower than the 79% captured this time two years ago
- Financials and Healthcare surpass Technology on bullish views and while most sectors see bears wane QoQ, downbeat sentiment on Chemicals lingers and last quarter's notable support for REITs is no more

Investor Sentiment Remains Generally Optimistic Heading into 2026; Continuation of Increasingly Upbeat Executive Tone Observed

This marks the third consecutive year where investor-observed management tone registers at the most upbeat level relative to prior three quarters; notably, sentiment sees a consistent, meaningful pullback within one to two quarters in similar fashion. Will 2026 be different?



Rate Cuts, Earnings Momentum, Productivity Gains, and Stimulus (Oh My!) Drive Favorable Views, But Optimism is Tempered by Frothy Valuations

Bullish

"Earnings growth, Fed rate cuts. "Buy Side, N. America, Generalist

"Capex, rate cuts, weak but not deteriorating job market. "Buy Side, N. America, Generalist

"Decent amount of optimism. "Buy Side, N. America, Multi

"Current conditions, decreasing interest rates, and economic incentives in OBBBA. "Buy Side, N. America, Multi

"Most executives are in the neutral to bullish category, but there is a selection bias. "Buy Side, N. America, Generalist

"Market realities overwhelm popular perceptions. "Sell Side, N. America, Generalist

Neutral to Bullish

"Fiscal stimulus in 2026 and continued consumer spending. "Buy Side, N. America, Generalist

"Earnings & revenue surprise, sustainable margins, fiscal & monetary policy. "Buy Side, N. America, Generalist

"I believe GDP growth will accelerate in 2026. "Buy Side, N. America, Generalist

"Low and falling interest rates. "Buy Side, N. America, Multi

"Continuing positive macro, ongoing EPS growth, likely interest rate decreases, and rolling back of counterproductive U.S. policies. "Buy Side, N. America, Multi

"Solid underlying figures with risk of another government shutdown, also expecting a correction mid-year. "Buy Side, N. America, Multi

"Improving fundamentals, industrial activity. "Buy Side, Europe, Multi

"Prospect of acceleration in trade deals globally and end of the Ukraine War. "Buy Side, Asia, Multi

"When everyone is calling for a bubble to pop, it's probably going to continue to expand. "Sell Side, N. America, Generalist

"There were mixed views, but retailers seemed to be mostly optimistic about store traffic and consumer spending. "Sell Side, N. America, Consumer Discretionary

Neutral

"I think the AI capex trade will continue to see upward revisions through 2027. After that, there is much less visibility. "Buy Side, N. America, Generalist

"Based on real-time data points, there is no immediate concern for the market momentum to stop. OBBBA is on the horizon, which should benefit both corporations and consumers. On the bearish side, it's hard not to argue that we're in a later stage of the AI bubble, with 2025 defined as a year when every positive headline caused a pop in AI equities, pricing in a lot of the future value immediately. The next wave of AI build-out will be heavily debt-fueled, which heightens the risk of the bubble popping if access to capital dries up. "Buy Side, N. America, Generalist

"GDP growth concerns. "Buy Side, N. America, Generalist

"Erratic and uncertain policies, the K-shaped economy, and the blooming prices of a few stocks, as well as AI and the AI-related industry in general. "Buy Side, N. America, Generalist

"AI adoption and potential productivity gains and margin expansion. "Buy Side, N. America, Multi

"Lower interest rates, lower oil prices, animal spirits. "Buy Side, N. America, Multi

"Skyrocketing valuations and no fear. "Buy Side, N. America, Multi

"Excessive stock market performance. "Buy Side, Europe, Generalist

Neutral to Bearish / Bearish

"Stretched valuations. "Buy Side, N. America, Generalist

"Valuation, contrarianism. "Buy Side, N. America, Generalist

"Excessive national debt. "Buy Side, N. America, Generalist

"Equity & debt valuations. Concentration of the drivers of the stock market and the economy. Uncertainty around government policy. "Buy Side, N. America, Multi

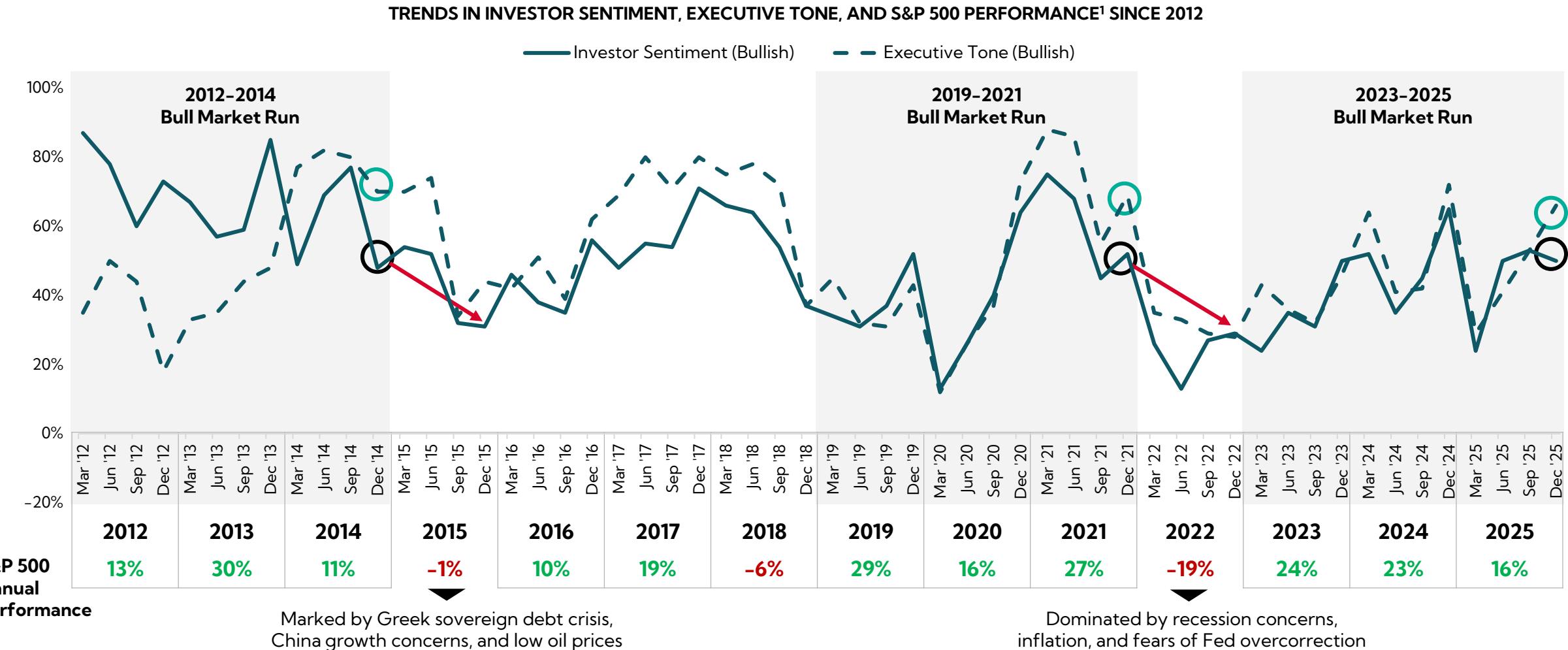
"Slowing growth, stubborn inflation, AI return on investment. "Buy Side, N. America, Multi

"Inappropriate monetary policy and likelihood of persistent inflation, leading to increased volatility. "Buy Side, N. America, Multi

"Over-valuation; topping patterns; AI boom about to bust. "Buy Side, N. America, Multi

History Shows After Three Consecutive Years of Positive S&P 500 Price Performance, Investor Sentiment in Our Survey Recedes in the Following Year (as does S&P 500 Performance)

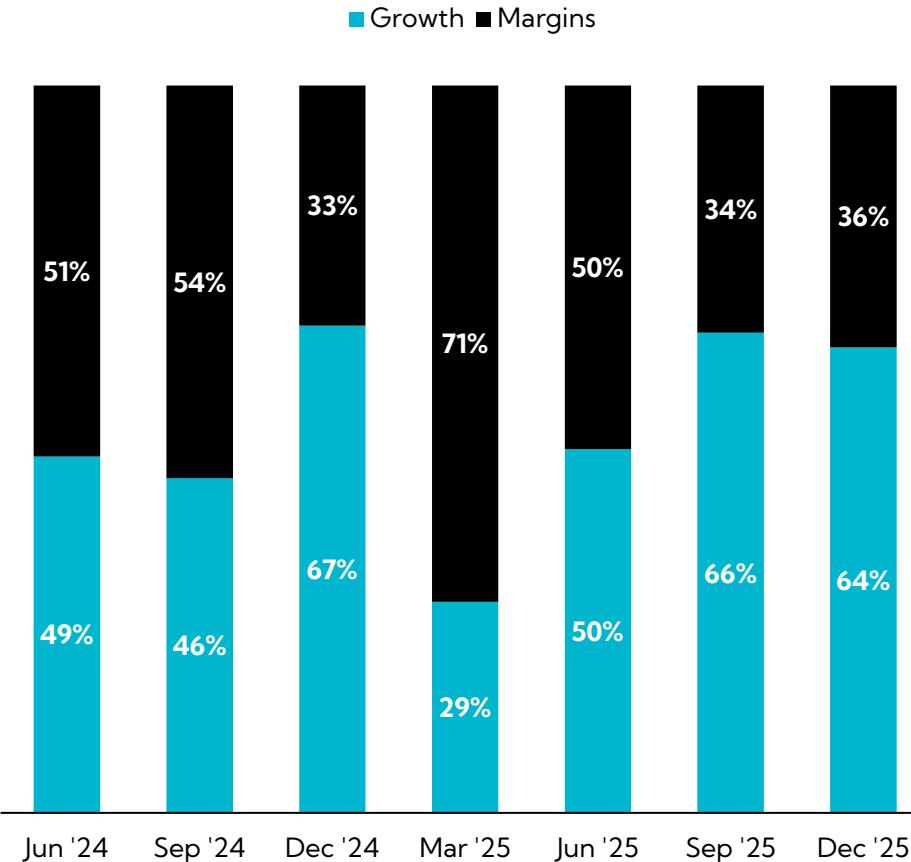
At the end of each three-year bull market run, investor sentiment is always more cautious than perceived management tone to start the year, as is the case this quarter heading into 2026; a top concern identified in each of those down years? The Fed! (the same result in this survey)



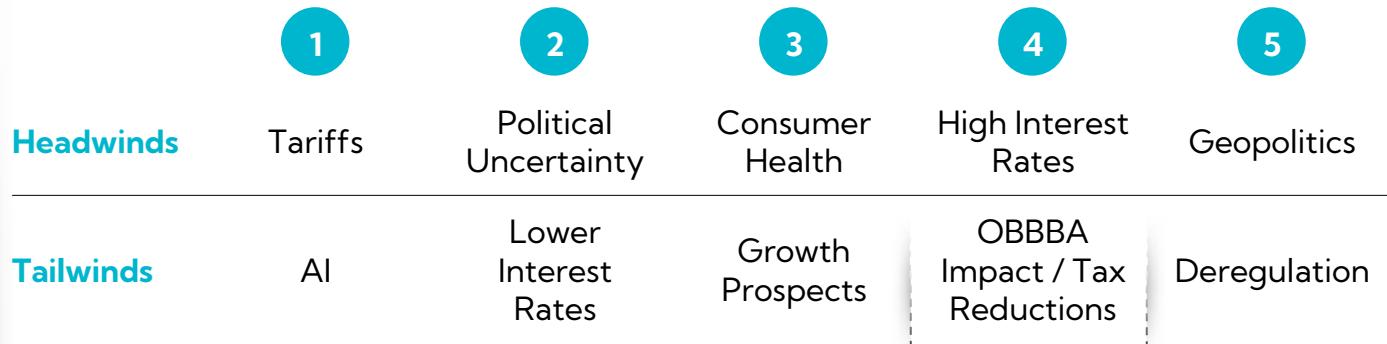
Investor Prioritization Remains Growth Heading into 2026; Zeal Supported by AI, Easing Rates, and Expected OBBBA Benefits

Underpinning top-line views, 45% expect U.S. GDP to continue to expand in 2026 with just under one-third modeling an in-line year

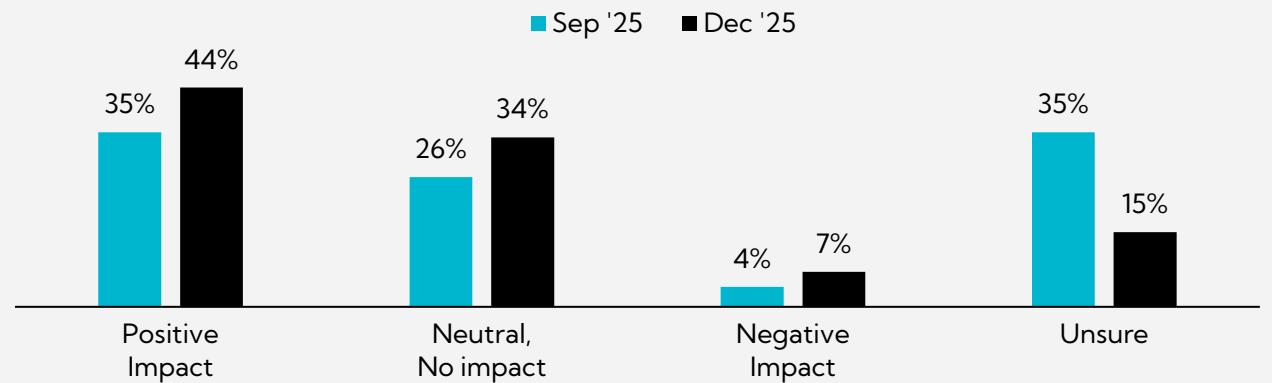
KPI PRIORITY AT THIS POINT IN THE CYCLE



TOP HEADWINDS AND TAILWINDS

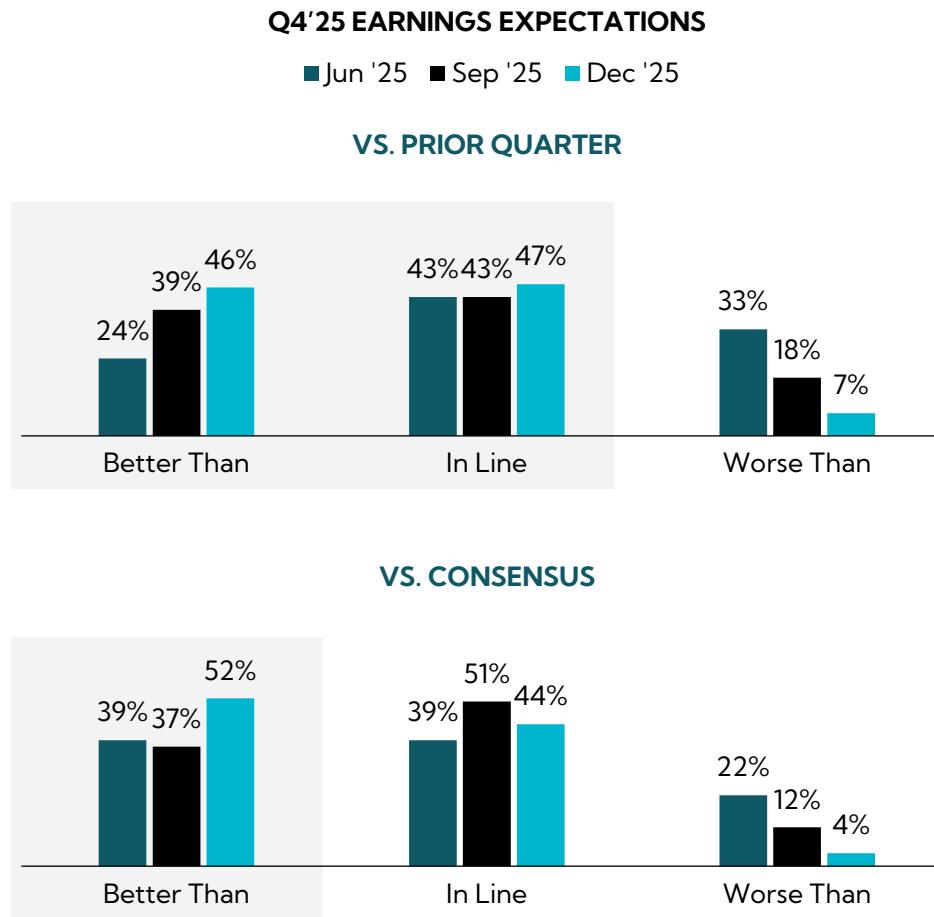


VIEWS ON OBBBA IMPACT ON FINANCIAL PERFORMANCE OVER NEXT SIX MONTHS



In Line to Better Than Earnings Results Expected, with More Anticipating Consensus Beats

70% believe Q4'25 results will surpass Q4'24 prints



Better Than

"Everything AI and data center-related: better than. Everything else: in-line." **Buy Side, N. America, Generalist**

"Wealth effect is helping the high-end consumer; a large tax refund outlook will help the middle-class consumer spend." **Buy Side, N. America, Generalist**

"OBBA." **Buy Side, N. America, Generalist**

"GDP report." **Buy Side, N. America, Multi**

"Strong growth." **Buy Side, N. America, Multi**
"OBBA and taxes." **Buy Side, N. America, Multi**

"Companies are doing well mostly by raising prices." **Buy Side, N. America, Multi**

"Pockets of green shoots and no real falloff in demand." **Sell Side, N. America, Multi**

In Line

"Tariff impact less than previously expected." **Buy Side, N. America, Generalist**

"Beats YTD in prior quarters, management tone, analyst sentiment, macro environment." **Buy Side, N. America, Generalist**

"Cost control and stronger economy." **Buy Side, N. America, Generalist**

"Momentum and seasonality." **Buy Side, N. America, Generalist**

"Consensus is always underperforming." **Buy Side, N. America, Generalist**

"Overall resilience throughout the system." **Buy Side, N. America, Multi**

"Q3 earnings were strong, and there was not much commentary regarding a change for the negative." **Buy Side, N. America, Multi**

"Companies implementing tariff mitigation efforts against conservative guidance." **Buy Side, N. America, Multi**

"Analysts have heightened expectations." **Buy Side, Europe, Generalist**

"Less negative environment for EPS." **Buy Side, Europe, Multi**

Worse Than

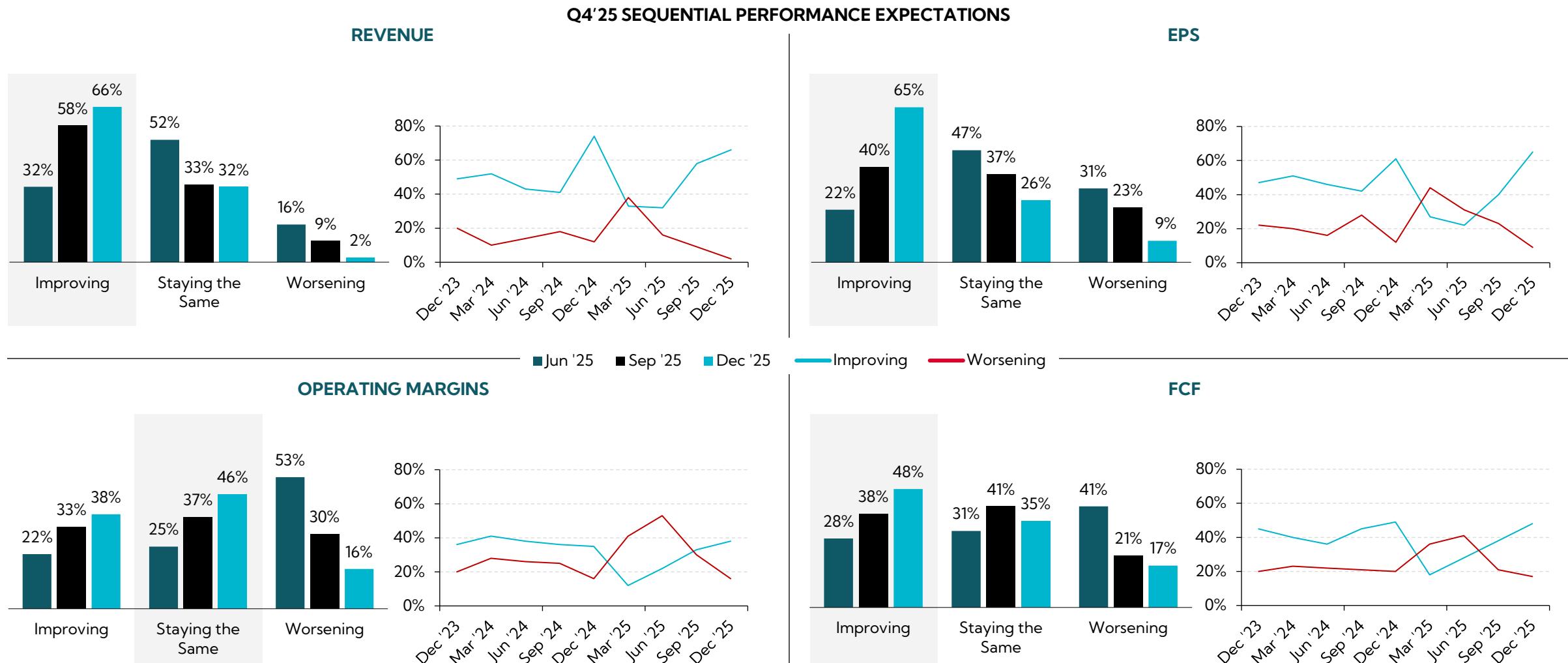
"A lot of companies have guided toward weaker Q4s. The government shutdown has impacted Q4, so it could potentially disappoint. A lot of companies have had conservative Q4s, so my hope is they guided conservative enough to beat." **Buy Side, N. America, Generalist**

"Growth concerns." **Buy Side, N. America, Generalist**

"If you review analysts' projections, they are constantly downgrading expectations." **Buy Side, N. America, Multi**

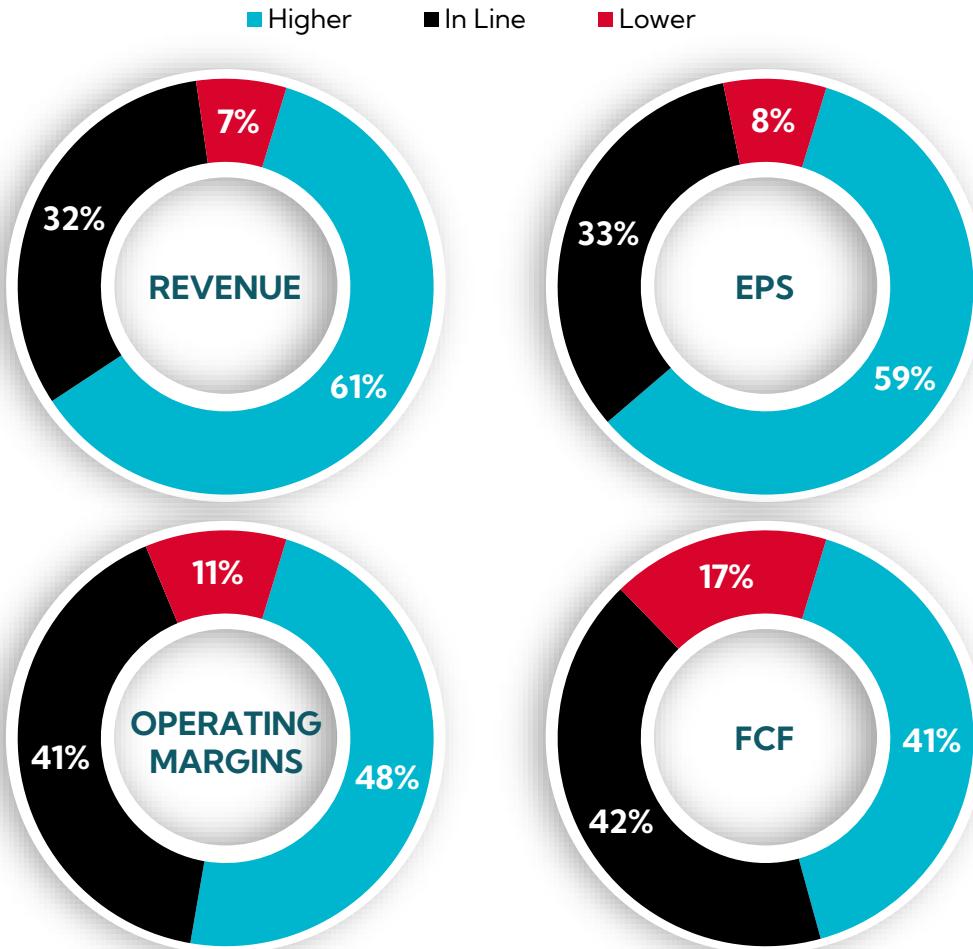
Expectations for Q4'25 Revenue, EPS, and FCF Build, While Optimism Around Margin Expansion is Less Pronounced

All KPIs see a drop in *Worsening* expectations



2026 Guidance Expectations: Revenue and EPS Growth with Margins and FCF Tempered Somewhat by Elevated Capex and Cost Pressures

FULL YEAR 2026 GUIDANCE EXPECTATIONS VS. 2025 ACTUALS



"I expect most industries outside of housing to see growth next year." **Buy Side, N. America, Generalist**

"Expanding economy and productivity." **Buy Side, N. America, Generalist**

"Capex picking up." **Buy Side, N. America, Generalist**

"Pricing inflation will continue to drive revenue growth. However, margin will likely stay the same due to potential headwinds from tariffs and higher expenses." **Buy Side, N. America, Generalist**

"OBBA starts to kick in and the benefits from it." **Buy Side, N. America, Generalist**

"After a good run in 2025, management teams will likely want to keep optimism in check and issue in-line guidance. Capex and AI investments will pressure FCF." **Buy Side, N. America, Generalist**

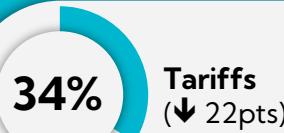
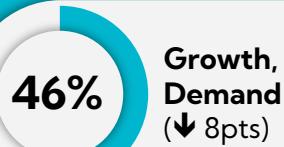
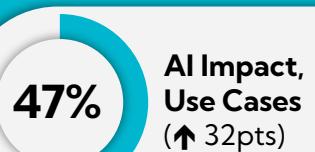
"The 2026 table is set for solid growth in the economy and individual companies." **Buy Side, N. America, Multi**

"Most of our companies have already guided higher, but cautioned on margins due to higher spending, higher input costs, or both." **Buy Side, N. America, Multi**

"Management teams are likely to be more cautious." **Buy Side, N. America, Multi**

"Tariff headwinds easing, steady/better demand environment." **Sell Side, N. America, Multi**

"2025 wasn't a great year overall, and some companies had poor years. Margins will improve if tariffs are rescinded." **Sell Side, N. America, Consumer Discretionary**



Topics of Interest for Upcoming Earnings Calls

AI jumps to the top, followed by demand landscape, while investors are increasingly focused on capex priorities with cost headwinds still of interest

Views from N. America

*"Growth opportunities, AI impact, cost cutting, and interest rates." **Buy Side, Generalist***

*"Volume vs. price, input inflation, regulatory impacts." **Buy Side, Generalist***

*"Capex, AI opportunities and threats, inflation." **Buy Side, Generalist***

*"Direct and indirect returns from hyperscale capex, impact of fiscal policy on inflation, ability of firms to pass on rising costs." **Buy Side, Generalist***

*"Sustainability of capex cycle, sustainability of earnings growth, M&A environment under Trump." **Buy Side, Generalist***

*"Supply constraints due to pricing and/or tariffs, aggregate demand, plans for organic growth vs. acquisition." **Buy Side, Generalist***

*"Headcount plans, productivity gains, use of FCF." **Buy Side, Generalist***

*"Inflation, tariffs, long-term targets." **Buy Side, Generalist***

*"AI implementation, AI monetization, tariff impacts." **Buy Side, Generalist***

*"Cost inflation, volume growth, capital allocation." **Buy Side, Generalist***

*"AI adoption and impact on margins and growth, bottlenecks with power, state of the consumer." **Buy Side, Multi***

*"AI uses cost and efficiency, high-end vs low-end buyers, pricing power." **Buy Side, Multi***

*"Growth, free cash, political climate." **Buy Side, Multi***

*"Effects of tariffs and trade issues, wage inflation and labor issues, and cost of goods pressure." **Buy Side, Multi***

*"AI impact, tariff impact, where do they see the most opportunities." **Buy Side, Multi***

*"AI uses cases, tariffs, consumer spending, and sentiment." **Buy Side, Multi***

*"Customer demand, tariff, and input costs, labor market, wages." **Buy Side, Multi***

*"AI usage and returns, volume trends, tariff impacts." **Buy Side, Multi***

*"Characterize demand environment, opportunity for margin improvement, M&A environment." **Sell Side, Multi***

*"Customer behavior now that there's better funding and less policy uncertainty, capital purchasing trends, given interest rates are coming down, benefit from pricing in 2026, given inflation has gone up." **Sell Side, Multi***

*"Outlook for 2026, consumer spending, tariffs mitigation." **Sell Side, Consumer Discretionary***

Views from Europe

*"Margins, capital allocation, top line." **Buy Side, Generalist***

*"Demand dynamics, sector productivity outlook, realism of AI integration projections." **Buy Side, Generalist***

*"Capital allocation, growth, margins." **Buy Side, Generalist***

*"Currency impact on margin and EPS, real consumer demand, capex for AI." **Buy Side, Multi***

*"AI bubble, inflation and tariffs, Fed policy, and consumer mood." **Buy Side, Multi***

Views from APAC

*"AI, geopolitical, net zero, when is it game over for this?" **Buy Side, Generalist***

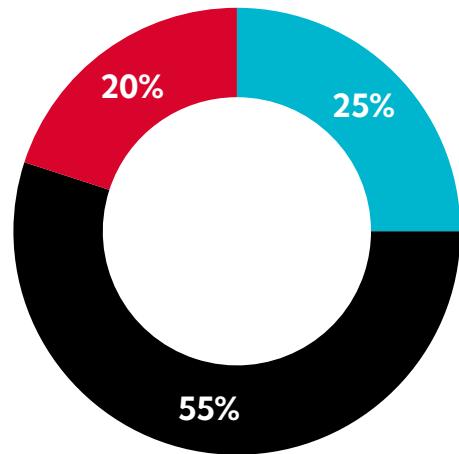
*"Slowdown of growth, global market changes, disruption in supply chains." **Buy Side, Multi***

Tariff Conditions Largely Expected to Remain the Same, with Financial Impact Already Being Felt or Expected in the Next Six Months; Increased Confidence in Mitigation Strategies

Over 60% of respondents are now *Somewhat Confident* in mitigation strategies, placing emphasis on pricing power and agility

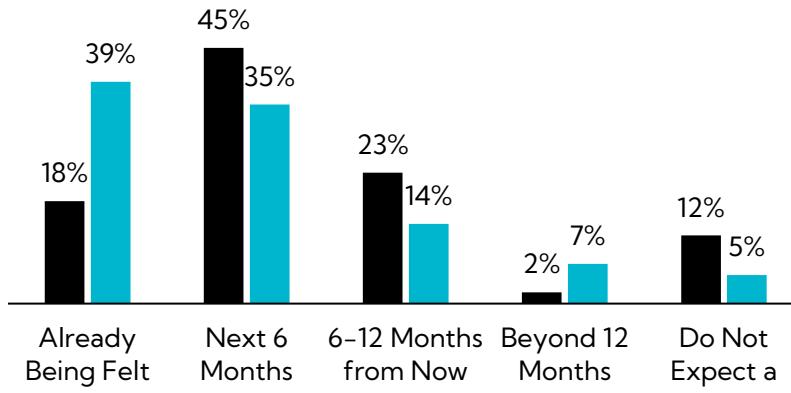
2026 TARIFF IMPACTS RELATIVE TO 2025

■ Improving ■ Staying the Same ■ Worsening



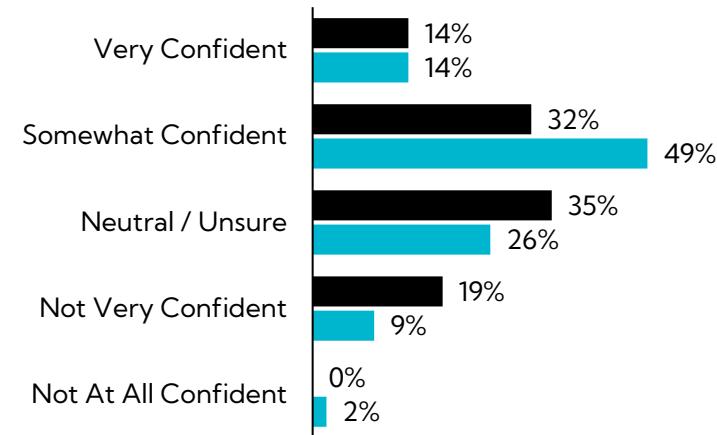
EXPECTATION FOR COMPANIES TO EXPERIENCE THE GREATEST FINANCIAL IMPACT FROM TARIFFS

■ Sep '25 ■ Dec '25



CONFIDENCE THAT COMPANIES HAVE EFFECTIVE STRATEGIES IN PLACE TO MITIGATE TARIFF IMPACT

■ Sep '25 ■ Dec '25



"Most companies have little control over their primary suppliers." **Buy Side, N. America, Multi**

"Strategies are in place, but can they be passed through to the customer." **Buy Side, N. America, Generalist**

"Focused on agile companies, pricing power (with broad moats) that can respond effectively once a clear path is presented. Remains a very fluid situation." **Buy Side, N. America, Generalist**

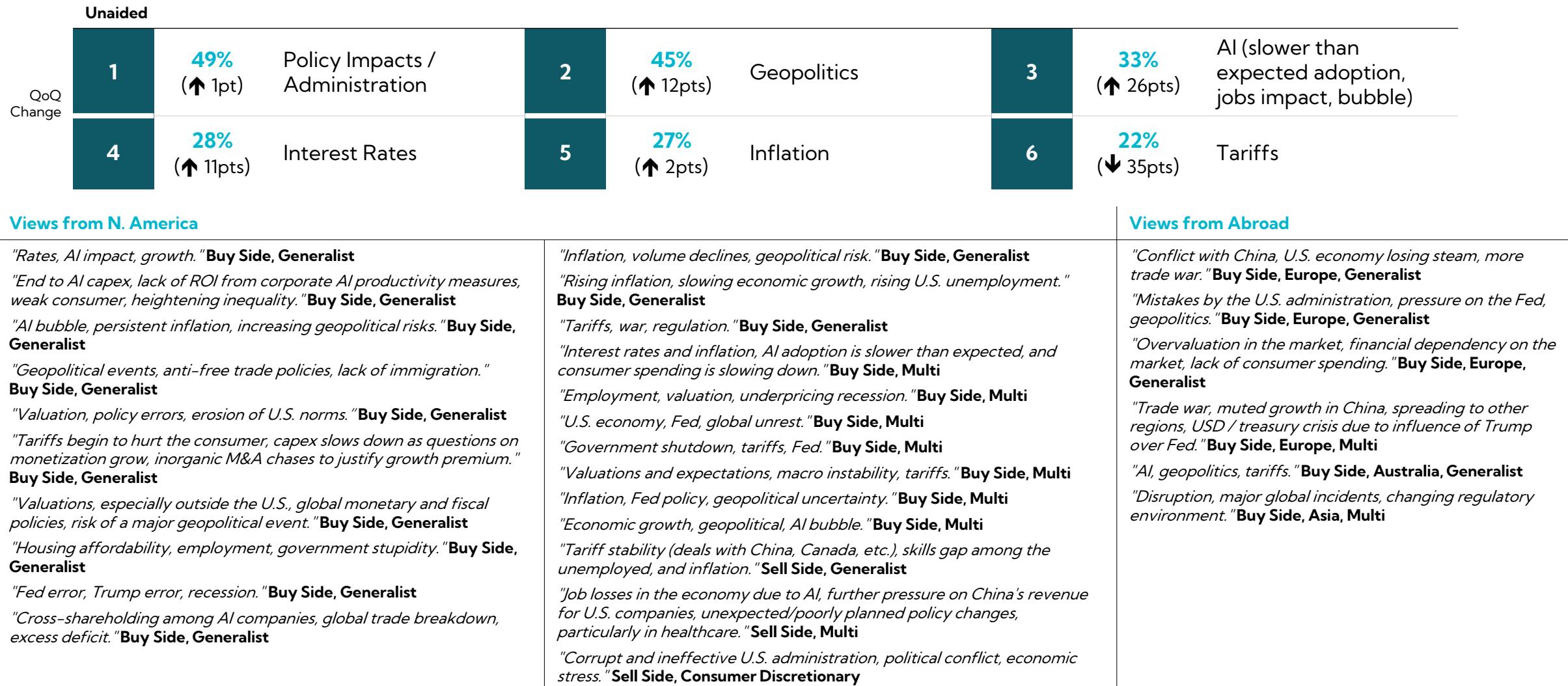
"Large cap should feel lower tariff impact." **Buy Side, N. America, Generalist**

"There have been signs of success, but some tariffs cannot be avoided." **Sell Side, N. America, Consumer Discretionary**

"Almost all our holdings put in permanent price increases related to tariffs." **Buy Side, N. America, Generalist**

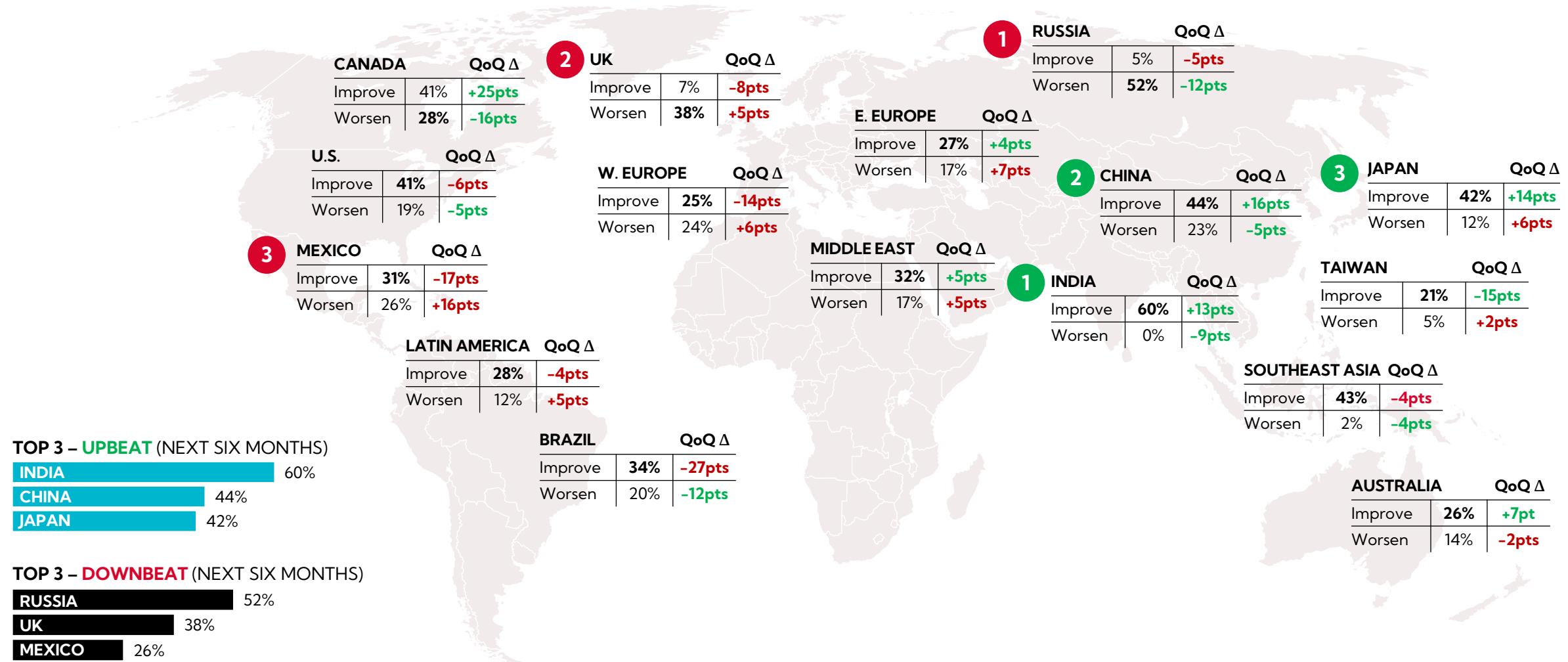
Top Concerns from Around the Globe

Policy and geopolitical risks rise to the forefront as tariff fears ease; AI impact breaks into the Top 3



Investor Optimism Centers on Asia, Led by India and China; Downbeat Views on Russia and UK Remain

66% of investors assign *Very High to High* risk to companies with business / operation exposure to China, compared to 79% in December 2023

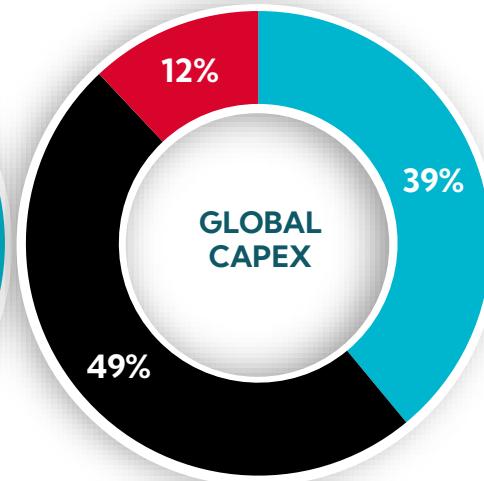
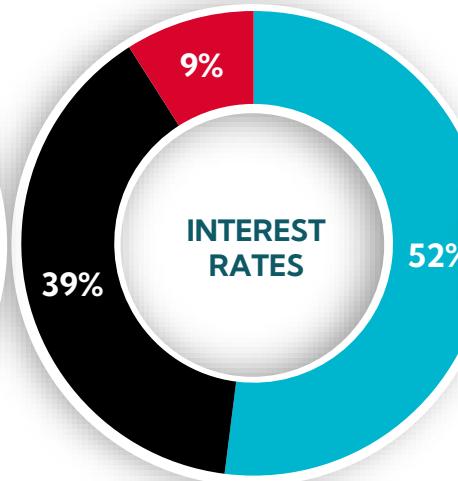
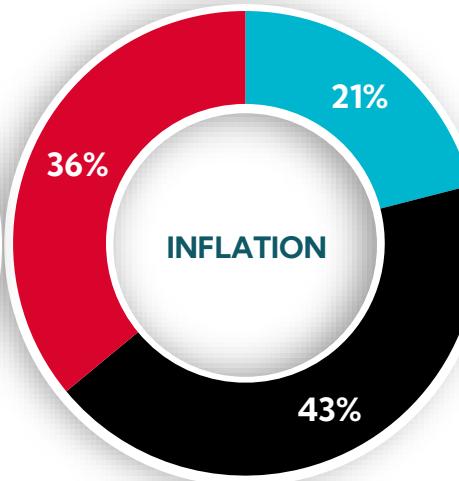
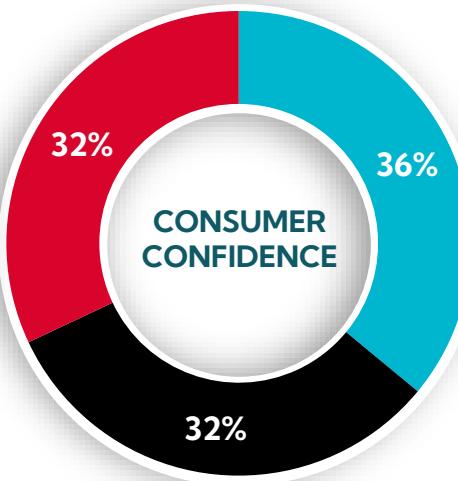


Key Economic Indicators – 2026 Relative to 2025

Survey finds high expectations for lower interest rates, but also a worsening labor market and mixed views on the consumer overall as the K-shaped recovery rages on; inflation expected to remain sticky and a headwind with views on global capex trends generally positive

VIEWS ON KEY ECONOMIC INDICATORS IN 2026, RELATIVE TO 2025

■ Improving ■ Staying the Same ■ Worsening

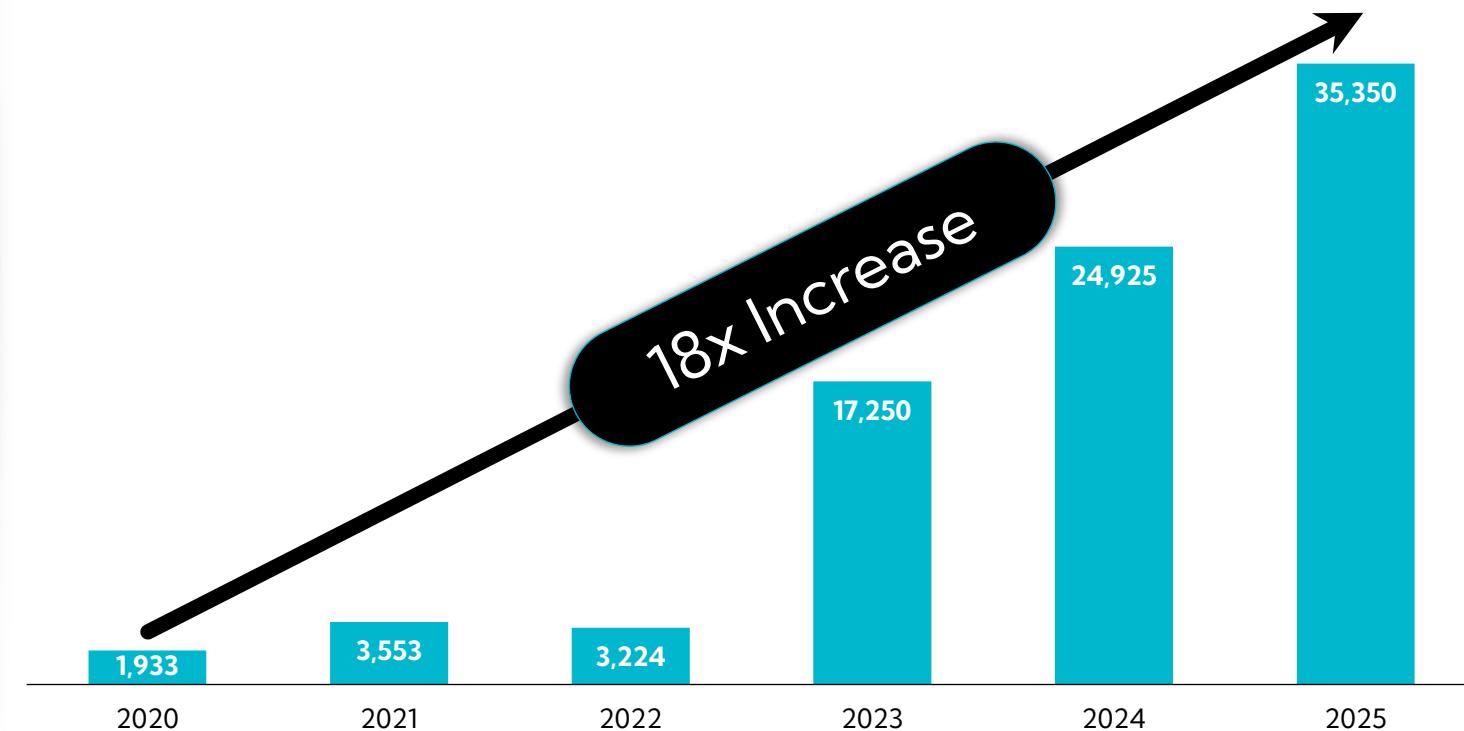


TOP AI QUESTIONS FOR COMPANIES

- 1 **54%** Application and Use
- 2 **36%** Investment and Cost
- 3 **29%** Efficiency / Productivity Gains
- 4 **23%** Impact on Employees
- 5 **20%** Impact on Revenue / Sales
- 6 **19%** Return on Investment

MENTIONS OF AI ON EARNINGS CALLS¹

(U.S. Companies >\$1B)



AI SPOTLIGHT

Optimism Remains High, but Investor Scrutiny is Intensifying Around Adoption Pace, Monetization, Margin Impact, and Competitive Risk

Attention is increasingly focused on execution discipline, governance, workforce implications, and risk of unintended consequences...stop us if you've heard this in history before!

Views from N. America

"Growth opportunities created, cost-cutting enabled, new lines of business." **Buy Side, Generalist**

"Productivity benefits, ability to use data to drive sales, hype vs. reality." **Buy Side, Generalist**

"Threat to your business model, AI use and spending, and expected ROI." **Buy Side, Generalist**

"Pace of adoption, where will AI's biggest impact likely be, and how has AI changed hiring plans." **Buy Side, Generalist**

"How do you monetize, is your business at risk from AI, how much are you spending?" **Buy Side, Generalist**

"Application of AI, goals for AI, return on AI investment." **Buy Side, Generalist**

"Penetration, cost, use cases." **Buy Side, Generalist**

"Cost to implementation, timeframe for benefits, revenue growth potential." **Buy Side, Generalist**

"AI use, how are they measuring AI contribution, what do they expect to accomplish from AI." **Buy Side, Generalist**

"Efficiency gains, competitive threats, revenue opportunities." **Buy Side, Generalist**

"Amount of investment, use case, how it will affect employment." **Buy Side, Generalist**

"Actual investment in AI, impact on staff and client service, expected ROI on any AI investment." **Buy Side, Multi**

"Impact on revenue, employee count, and morale." **Buy Side, Multi**

Views from Europe

"Investments, productivity increases due to AI investments, AI integration." **Buy Side, Generalist**

"In what ways do you utilize AI, how is AI a threat or help to your business in the future, how does it impact margins now/future?" **Buy Side, Generalist**

"Realism of productivity gains projected, real unit costs of implementing AI, concerns over misuse of AI - i.e., cybersecurity issues." **Buy Side, Generalist**

"What is the AI plan, when do you see monetization of AI capex to realize, will AI capex impact EPS growth?" **Buy Side, Multi**

"Are we in a bubble, how quickly is AI adapted compared to mobile phones, the internet, and capex?" **Buy Side, Multi**

Views from APAC

"How to best incorporate it to improve processes, how to free up more time, what are others using it for?" **Buy Side, Generalist**

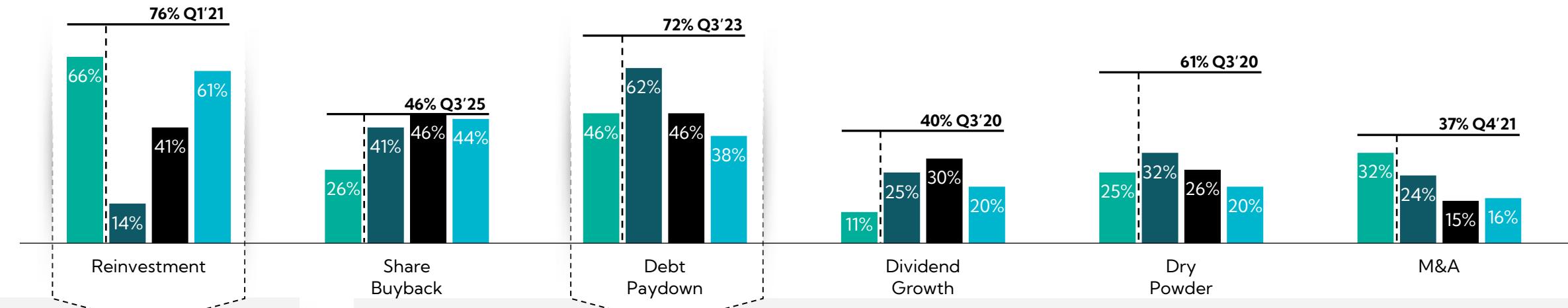
"Adoption, safeguards, agentic." **Buy Side, Multi**

Reinvestment Returns as Top Preference after Four Quarters, the Highest Level Since Q4'24 ('Trump Bump') and Q1'21 (Goldilocks Capex Supercycle)

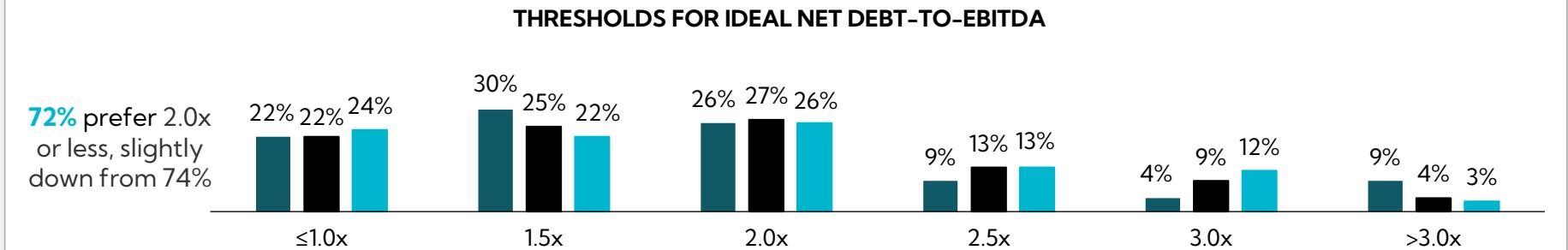
Buybacks continue to see investor support, while dry powder and M&A interest ebbs and debt paydown preference increases to lowest level since Dec. 2021, though ideal thresholds remain conservative

PREFERRED USES OF CASH
In Descending Order of Top Two Preferences

Dec '24 Jun '25 Sep '25 Dec '25 — 5-Year High

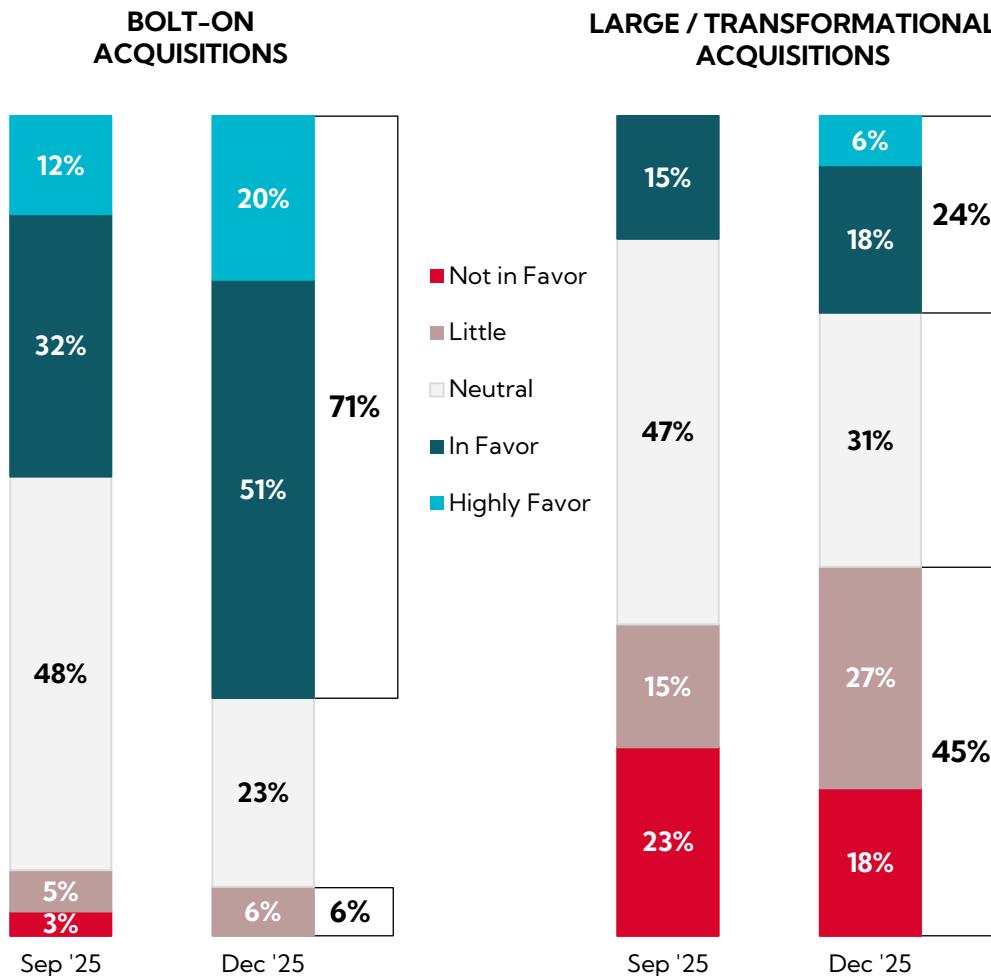


Capex across the S&P 500 increased in Q3 for the second consecutive quarter, up 8% QoQ and 18% YoY with nearly all sectors upping investment

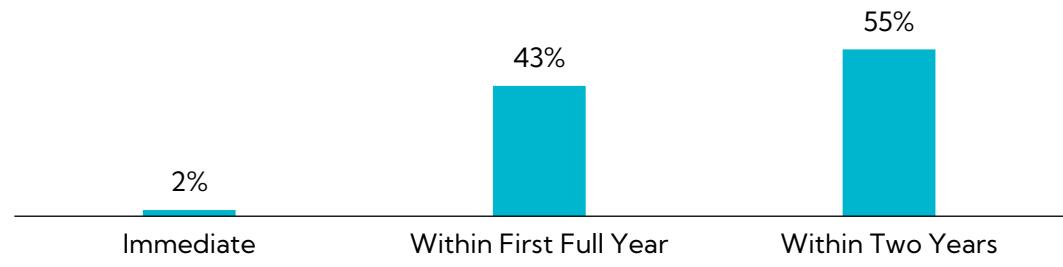


Support Remains Strong for Bolt-on M&A, While Caution Persists Around Large, Transformational Deals

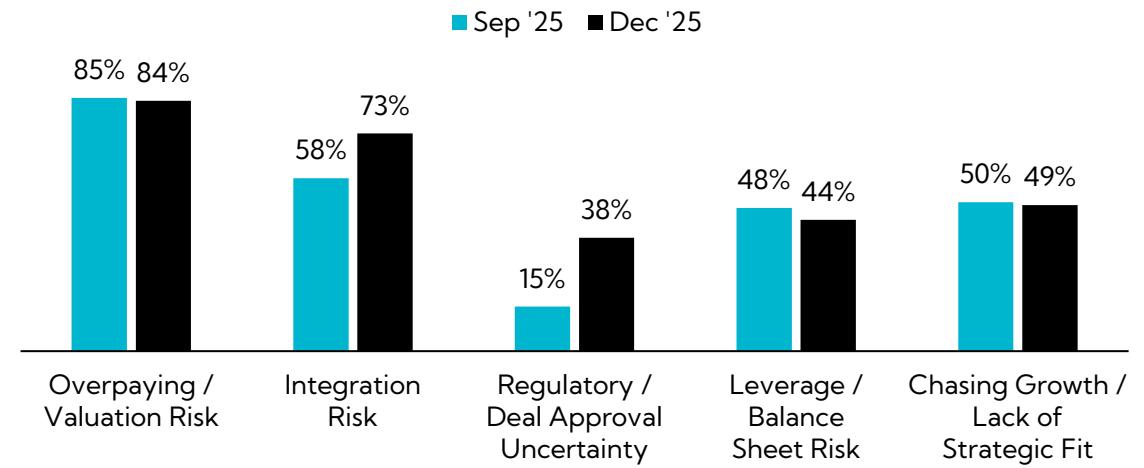
Price paid and integration risk remain top of mind, while investors have more concern with the regulatory environment QoQ; over half the respondents are comfortable with EPS accretion within two years of close



TIMEFRAME INVESTORS EXPECT INCREMENTAL EPS ACCRETION FOLLOWING AN ACQUISITION

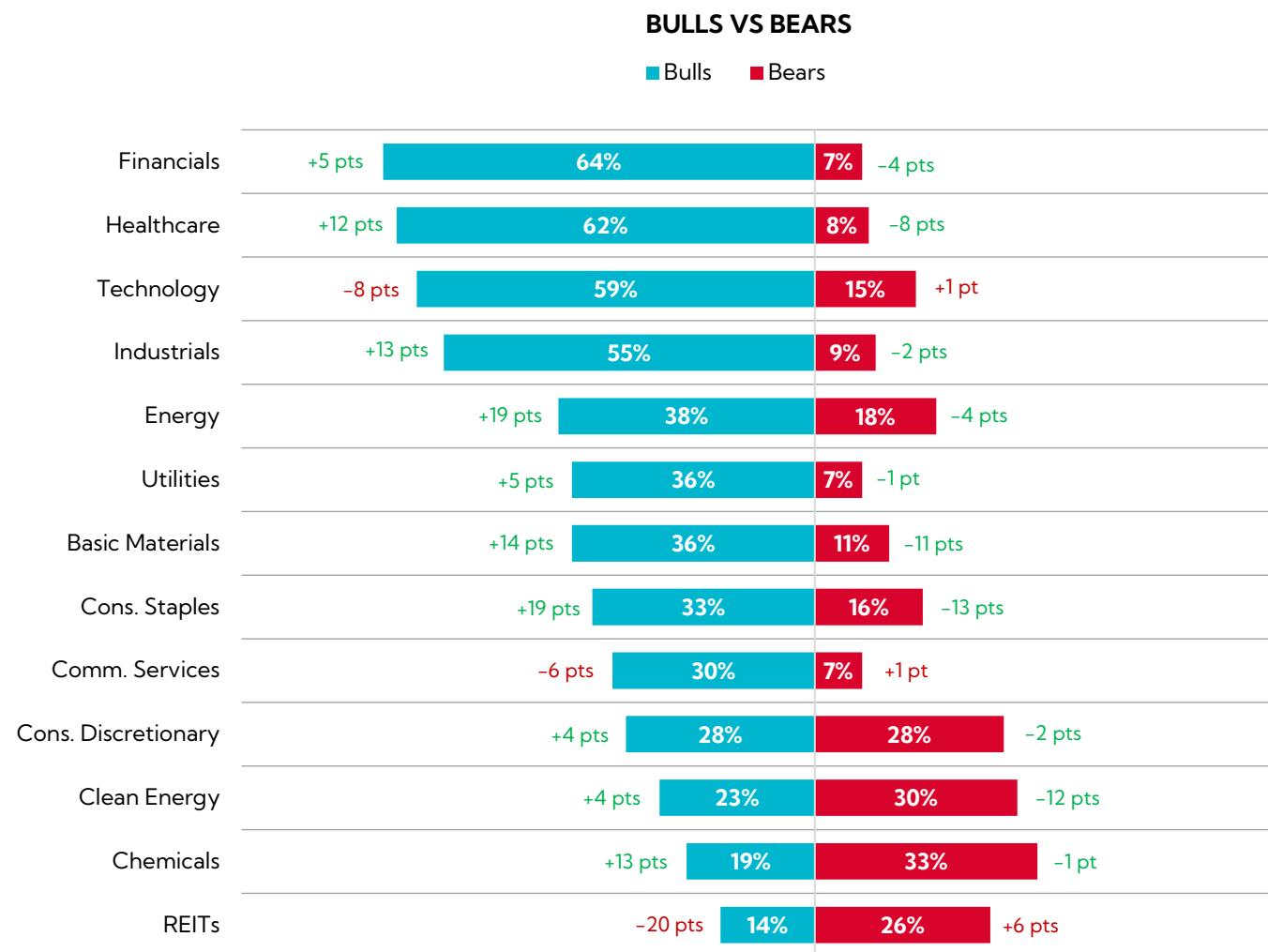


LEADING CONCERN / RISKS WITH LARGE, TRANSFORMATIONAL M&A IN THE CURRENT ENVIRONMENT



Financials and Healthcare Lead Sector Optimism as Bulls Rotate Beyond Tech

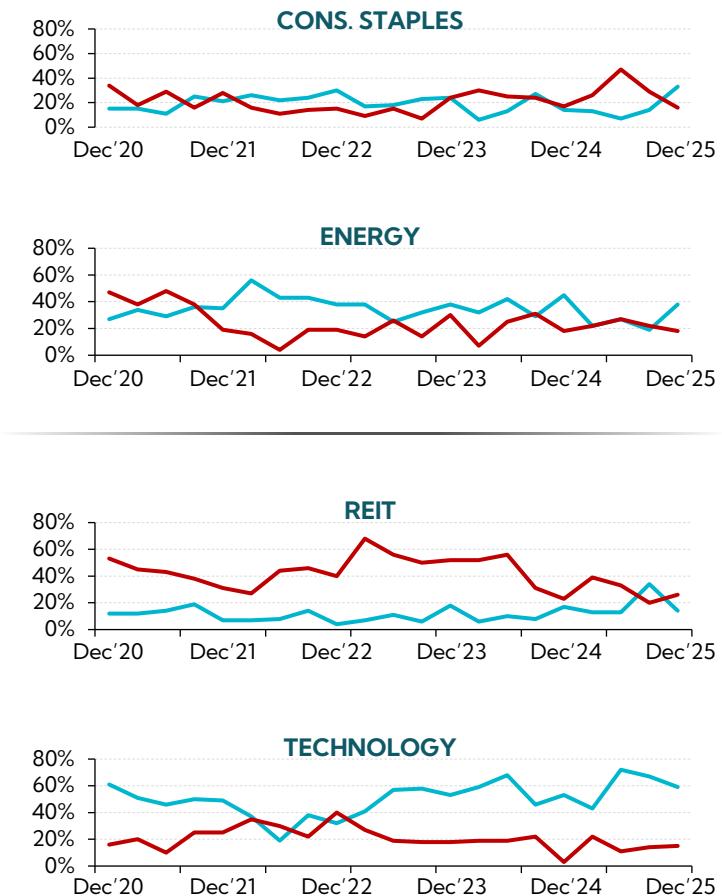
Most sectors see fewer bears QoQ; however, downbeat sentiment on Chemicals lingers and last quarter's notable support for REITs is no more



Q4'25 S&P 500 SECTOR PERFORMANCE¹

+1.6%
+11.2%
+1.3%
+0.5%
+0.7%
(2.1%)
+0.7%
(0.7%)
+7.1%
+0.6%
+12.3%
(4.9%)
(3.7%)

LARGEST BULL AND BEAR MOVERS





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