

Stock Valuation Report for Tesla, Inc. (TSLA)

Report Generated on August 03, 2026

This report provides an AI-supported analysis of the selected security, combining fundamental, technical, and qualitative insights to help you better understand its potential risks and rewards.

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Report Data Summary

Report Data Field	Value
Exchange	NMS
Reporting Currency	USD
Market Timezone	America/New_York
Market Data As Of	2026-08-03 17:02:29

Choose how much detail you want to read

QUICK REPORT

Five concise pages in plain language

FULL DETAILED REPORT

Complete analysis, sources, charts, and disclosures

Both views are included in this single PDF. Use the tab-like links in the footer to move between them at any time.

Quick Report 1 of 5 - Investment Snapshot

A plain-language overview of the current price, estimated value, model view, and one-year base scenario.

Current share price \$320.11 The market price used for all comparisons in this report.	Cash-flow value estimate \$3.69 A long-term value estimate based on future cash flow; confidence: High.	Earnings value estimate \$24.92 An estimate based on earnings and a supported peer valuation multiple.
Overall outlook Moderately Bearish Combines business results, estimated value, price trends, opportunities, and risks.	Do the major sections agree? Aligned, Widely Dispersed Aligned means the main sections generally support the same overall conclusion.	Confidence in the estimates Medium This describes the quality of the inputs and methods, not certainty about the future.

What this means

The overall outlook is moderately bearish. Agreement across the major sections is described as aligned, widely dispersed. The cash-flow value estimate is about 99.00% below the current share price used in this report. Confidence in the valuation estimates is medium; this is not a guarantee of future performance.

One-year scenario ranges

Bear range: \$32.54 to \$158.77; base range: \$158.77 to \$411.23; bull range: \$411.23 to \$537.46.

Confidence: Very Low. The exact center estimate of \$285.00 is a secondary reference inside the wider risk range, not a promised price.

Estimated values and price scenarios are analytical tools, not promises. A stock can remain above or below estimated value for a long time.

Quick Report 2 of 5 - What Could Help or Hurt the Stock

The three strongest supported positives, the three most important risks, and the developments that could change the view.

Why the stock could do better

- Energy storage growth can diversify revenue and improve mix, with utility-scale deployments potentially strengthening cash generation over the medium term.
- Software and fleet monetization can raise average revenue per vehicle and support margins if adoption broadens across the installed base over the medium to long term.
- Vehicle volume expansion can improve factory utilization and revenue scale, with the report indicating this remains central to growth over the near to medium term.

What could go wrong

- EV pricing pressure can compress automotive margins and weaken valuation if Tesla must trade price for volume against aggressive competitors.
- Execution risk in ramping new products and factories can raise costs, disrupt deliveries, and delay cash flow from new capacity.
- Regulatory, safety, and technology risks, including autonomous-driving scrutiny and product-liability exposure, can raise compliance costs and weigh on investor confidence.

What would change the view

- A sustained improvement in operating margin toward materially higher single digits, combined with stronger free cash flow and continued revenue growth, would justify raising the estimates.
- A decisive break above the 200-day EMA with improving MACD, RSI, and volume confirmation would raise the 30 to 90 day forecasts.
- A material slowdown in deliveries, weaker revenue growth, or renewed margin compression would lower the 180 day and 365 day estimates further.

Beginner note: catalysts are events or trends that may help the business or share price. Risks are conditions that may weaken results or investor confidence.

Quick Report 3 of 5 - Financial Health and Valuation

A compact view of business health, estimated value, and the current analyst consensus when available.

Measure	Report value	Plain-English meaning
Revenue (TTM)	\$103.62 billion	Total sales over the latest twelve months.
Net income (TTM)	\$3.80 billion	Profit remaining after expenses and taxes.
Free cash flow (TTM)	\$5.75 billion	Cash available after normal operations and capital spending.
Debt-to-equity	0.19x	Higher values generally mean more financial leverage.
Profit margin	3.67%	How much profit the company keeps from each dollar of sales.
Revenue growth	26.13%	Whether sales are expanding or shrinking on the validated period basis.
Dividend yield	0.00%	Estimated annual cash dividend relative to the current share price.

How valuation looks

The stock's trailing P/E is 293.67x.

That is 1184.41% above the selected-peer median of 22.86x. A lower multiple can indicate opportunity, but it may also reflect company-specific risk.

The DCF estimate is 98.85% below the current price. The detailed DCF section shows the forecast, discount rate, sensitivity table, and mathematical checks.

Analyst measure	Current consensus	How to read it
Mean price target	\$398.30 (24.43%)	Published target range: \$125.00 to \$600.00. Targets are opinions, not promises.
Rating mix	6 strong buy, 17 buy, 18 hold, 6 sell	This is the provider's analyst mix, not this report's recommendation.
Next-year growth estimates	EPS 23.96%, revenue 13.83%	Shows the current consensus direction for earnings and sales.
Next earnings date	2026-10-21	A major date when estimates and price expectations may change.

Quick Report 4 of 5 - Market Signals and Recent Developments

A beginner-friendly view of price momentum, important price levels, material news, disclosed trading activity, and call/put option quality.

Market signal	Reading	How to interpret it
Overall price signal	Mixed	Combined trend and momentum reading.
Price vs. 200-day average	Below	Above supports the long-term trend; below signals weakness.
RSI	35.94	Above 70 can be stretched; below 30 can be unusually weak.
Trend strength (ADX)	30.88	Above 25 often indicates a stronger trend; ADX does not show direction.
Trading volume vs. normal	0.55x	Above 1.00x means trading is heavier than the prior 20-day average.
Typical daily move (ATR)	\$16.61 (5.19%)	The recent average trading range; larger values mean wider normal swings.
52-week position	-35.83% from high; 7.64% from low	Shows where the share price sits within its one-year range.
6-month relative return	S&P 500 -34.96%; XLY -23.37%	Positive values mean the stock outperformed the named benchmark.
Short interest	2.00% of float; 1.63 days to cover	Higher values can signal skepticism and may increase squeeze risk.
Options-priced earnings move	+/- 21.00%	Market-priced move size around earnings; it does not predict direction.
Nearest support / resistance	\$303.62 / \$317.15	Nearby areas where buying or selling pressure may increase.

Technical-data basis: indicators were calculated deterministically in Python from Yahoo Finance price and volume data retrieved 2026-08-03.

Latest verified development: Event: Tesla agreed to purchase the entire output of a 140-megawatt solar project in Texas through a long-term power purchase agreement.

Disclosure or screen	Quick finding
Lawmaker disclosures	No qualifying trades found
Insider transactions	No qualifying trades found
Call option screening	No supported scenario
Put option screening	5 supported; top expires 2026-12-18; strike \$350.00

Quick Report 5 of 5 - Outlook, Confidence, and Next Steps

The modeled price path, the report's bottom line, validation status, and links into the complete supporting analysis.

Horizon	Bear range	Base range	Bull range	Confidence
Current	\$320.11 - \$320.11	\$320.11 - \$320.11 (center \$320.11)	\$320.11 - \$320.11	Observed
30 days	\$232.77 - \$272.38	\$272.38 - \$351.62 (center \$312.00)	\$351.62 - \$391.23	Low
90 days	\$168.04 - \$234.02	\$234.02 - \$365.98 (center \$300.00)	\$365.98 - \$431.96	Very Low
180 days	\$111.49 - \$203.25	\$203.25 - \$386.75 (center \$295.00)	\$386.75 - \$478.51	Very Low
365 days	\$32.54 - \$158.77	\$158.77 - \$411.23 (center \$285.00)	\$411.23 - \$537.46	Very Low

Bear, base, and bull zones divide the existing 80% modeled uncertainty band. The exact center estimate remains a secondary reference, not a promised price.

Bottom line

The report's overall outlook is moderately bearish. Confidence in the valuation estimates is medium, so the results should be treated as informed estimates rather than promises. The strongest near-term support is the oversold technical setup, with RSI at 35.94 and stochastic readings depressed.

Confidence and validation

Report-wide validation status: Failed. 156 checks were performed. 4 failed or review-level item(s) require attention.

Forecast accuracy statistics remain withheld until 100 forecasts have matured. 0 have matured and 100 more are required; see the full Conclusions section for the scorecard.

[OPEN FULL DETAILED REPORT](#)

[VIEW DETAILED CONTENTS](#)

The Quick Report summarizes the same canonical data and completed report sections shown in the detailed report. It does not replace the detailed sources, assumptions, tables, or disclosures.

Full Detailed Report - Table of Contents

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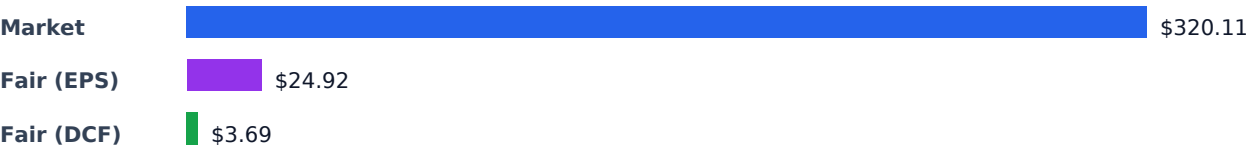
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Executive Summary - (TSLA) Tesla, Inc.

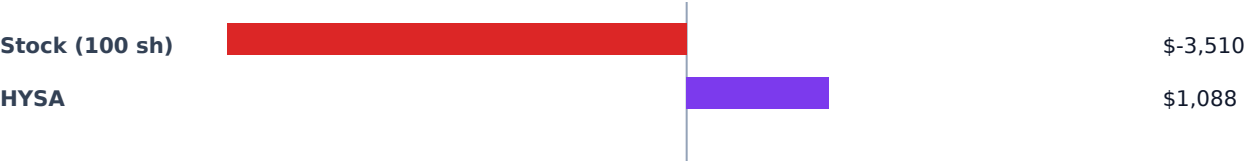
At a Glance

Current Price	Fair Value (EPS)
\$320.11	\$24.92
Fair Value (DCF)	Model View
\$3.69	Moderately Bearish
Evidence Alignment	Valuation Confidence
Aligned, Widely Dispersed	Medium

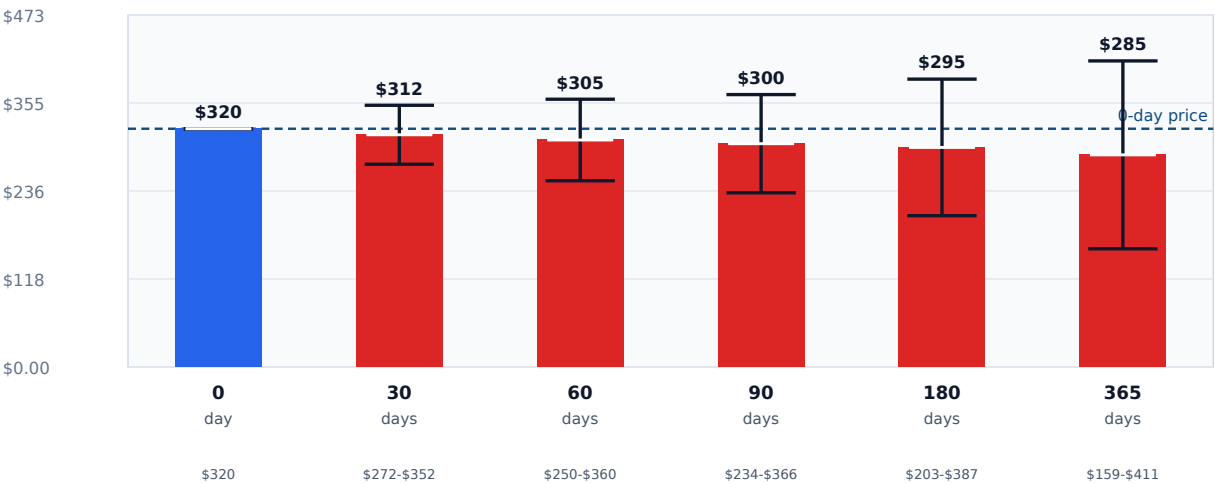
Current vs Fair Value (EPS & DCF)



One-Year Profit/Loss: Stock vs High-Yield Savings



Base-Case Price Ranges by Interval



Solid bars show each interval's center estimate. Thin whiskers show the complete base-case range. Future intervals are green when the center estimate is above the 0-day price and red when it is below; the 0-day observation is blue.

Forecast Scenario Ranges (Primary View)

Horizon	Bear range	Base range	Bull range	Confidence
Current	\$320.11 - \$320.11	\$320.11 - \$320.11 center \$320.11	\$320.11 - \$320.11	Observed
30 days	\$232.77 - \$272.38	\$272.38 - \$351.62 center \$312.00	\$351.62 - \$391.23	Low
60 days	\$195.46 - \$250.23	\$250.23 - \$359.77 center \$305.00	\$359.77 - \$414.54	Low
90 days	\$168.04 - \$234.02	\$234.02 - \$365.98 center \$300.00	\$365.98 - \$431.96	Very Low
180 days	\$111.49 - \$203.25	\$203.25 - \$386.75 center \$295.00	\$386.75 - \$478.51	Very Low
365 days	\$32.54 - \$158.77	\$158.77 - \$411.23 center \$285.00	\$411.23 - \$537.46	Very Low

Bear, base, and bull zones divide the existing 80% modeled uncertainty band. The exact center estimate is retained only as a secondary reference and is not a promised price.

Investment View

Model View: Moderately Bearish; Evidence Alignment: Aligned, Widely Dispersed; Valuation Confidence: Medium

Tesla combines strong revenue growth, positive free cash flow, and conservative leverage with extremely stretched valuation. Current Stock Price: 320.105. DCF Intrinsic Fair Value: 3.69. Technicals are mixed to bearish, with price below the 200-day EMA and negative MACD, while the main catalyst is energy and software monetization. The principal risk is pricing pressure and execution strain. Confidence-weighted Model View is Moderately Bearish.

Key Catalysts

- Energy storage growth can diversify revenue and improve mix, with utility-scale deployments potentially strengthening cash generation over the medium term.
- Software and fleet monetization can raise average revenue per vehicle and support margins if adoption broadens across the installed base over the medium to long term.
- Vehicle volume expansion can improve factory utilization and revenue scale, with the report indicating this remains central to growth over the near to medium term.

Key Risks

- EV pricing pressure can compress automotive margins and weaken valuation if Tesla must trade price for volume against aggressive competitors.
- Execution risk in ramping new products and factories can raise costs, disrupt deliveries, and delay cash flow from new capacity.
- Regulatory, safety, and technology risks, including autonomous-driving scrutiny and product-liability exposure, can raise compliance costs and weigh on investor confidence.

Stock Investment Projection (100 Shares)

Starting Investment: \$32,010.50

Projected Sale Proceeds: \$28,500.00

Projected Annual Dividend Per Share: \$0.00

Projected Dividend Income: \$0.00

Capital Gain or Loss: \$-3,510.50

Projected Ending Value: \$28,500.00

Total Profit: \$-3,510.50

Risk and Reward: Equity-market risk; the projected result includes sale proceeds plus the selected forward annual dividend, which may be changed or suspended.

High-Yield Savings Projection

Assumed HYSA APY: 3.40%

Rate Source: Marcus by Goldman Sachs - Online Savings Account
(MARCUS_ONLINE_SAVINGS_APY)

Source Observation Date: 2026-08-03

Retrieved: 2026-08-03

Assumption: The displayed APY is assumed to remain unchanged for one year, and interest is reinvested. Representative variable APY quoted by the named FDIC-insured online savings provider; it is not a market-wide maximum, and the rate may change before or after an account is opened.

Starting Deposit: \$32,010.50

Projected Ending Value: \$33,098.86

Total Profit: \$1,088.36

Risk and Reward: Lower market risk; the projection assumes the stated APY remains available for the full year and interest is reinvested.

Profit Comparison

1. The 100-share stock projection produces total profit of \$-3,510.50, which is \$4,598.86 lower than the high-yield savings projection.
2. The high-yield savings projection produces total profit of \$1,088.36, which is \$4,598.86 higher than the 100-share stock projection.

Call Option Screening Result

No supported call option scenario was identified.

Put Option Screening Result

Official Contract Symbol: TSLA261218P00350000

Expiration Date: 2026-12-18

Strike Price Per Share: \$350.00

Premium Used Per Share: \$52.45

Breakeven at Expiration Per Share: \$297.55

Forecast Price at Expiration Per Share: \$297.39

Modeled Profit/Loss Per Contract at Expiration: \$16.11

Maximum Theoretical Gain Per Contract if the Stock Falls to Zero: \$29,755.00.

Maximum Loss Per Contract: \$5,245.00

Quality Score: 0.68

Model View

Model View: Moderately Bearish; Evidence Alignment: Aligned, Widely Dispersed; Valuation Confidence: Medium

DCF implies -98.85% versus the canonical price; EPS valuation implies -92.21% versus the canonical price; 365-day modeled scenario implies -10.97% versus the canonical price. Overall DCF confidence is High. The methods point in a similar direction but differ widely in magnitude, so confidence is capped. Plausibility review: Supported intrinsic-value methods differ by 6.75x in magnitude.

Why Valuation Methods Disagree

Method Value Difference vs Current What the method measures

DCF \$3.69 per share -98.85% Values long-run free cash flow after reinvestment, discounted at WACC or cost of equity; it is sensitive to capital spending, cash conversion, terminal growth, and the discount rate.

EPS multiple \$24.92 per share -92.21% Applies a supported earnings multiple to EPS; it can remain high when accounting earnings are strong even if capital intensity or near-term free cash flow is weak.

365-day modeled price \$285.00 per share -10.97% A market-price scenario blending fundamentals, technical conditions, catalysts, and risks; it is not an intrinsic-value calculation.

Reconciliation: The supported methods are not in material directional conflict. Differences mainly reflect the distinction between long-run intrinsic cash-flow value, earnings-multiple value, and a one-year market-price scenario.

Company Overview - (TSLA) Tesla, Inc.

Overview

Tesla, Inc. designs, manufactures, and sells electric vehicles, battery energy storage systems, and related services. Its primary economic value comes from vehicle sales, software-enabled features, charging access, and recurring energy-generation and storage deployments. The company also operates a software and services layer around its fleet, which can support margins and customer retention over time.

Business Segments

- Automotive is Tesla's largest revenue source, spanning Model 3, Model Y, Model S, Model X, and Cybertruck, along with regulatory credits and after-sales services.
- Energy generation and storage is a meaningful growth engine, centered on Megapack, Powerwall, and related grid-scale and residential offerings.
- Services and other revenues reflect charging, used vehicles, maintenance, repair, insurance-related activities, and the broader installed base, which adds recurring and lower-margin revenue.

Competitive Position

Tesla benefits from strong brand recognition, vertical integration, software capabilities, and a large global installed base that supports charging, service, and software monetization. It also faces intense competition in EVs from legacy automakers and Chinese manufacturers, plus pricing pressure, faster product cycles, and commodity-like dynamics in parts of the automotive market.

Strategy and Growth Drivers

- Vehicle volume expansion remains central, because higher deliveries can raise revenue scale and improve factory utilization, although it can also pressure automotive gross margin if achieved through discounting.
- Energy storage growth can diversify the business and improve mix, since utility-scale deployments may add higher-value recurring demand and strengthen cash generation as manufacturing capacity expands.
- Software and fleet monetization, including paid features and connected services, could increase average revenue per vehicle and support margins if Tesla broadens adoption across its installed base.

Key Risks

- Pricing pressure in EVs can compress automotive margins and weaken valuation if Tesla must trade price for volume against aggressive competitors.
- Execution risk in ramping new products and factories can raise costs, disrupt deliveries, and delay expected cash flow from new capacity.
- Regulatory, safety, and technology risks, including autonomous-driving scrutiny and product-liability exposure, could increase compliance costs and weigh on investor confidence.

Source References: [1], [2], [3], [4], [5], [6], [7], [8], [9], [10], [11], [12], [13], [14], [15], [16], [17]

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Executive Leadership and Board - (TSLA) Tesla, Inc.

Executive Leadership

Latest available official roles were reconciled through 2026-08-03. The newest dated supporting record found was 2026-07-01; no newer contradictory official change was identified.

Transparency note: some roles rely on the latest available dated official information from 2026-07-01 or earlier; no more recent official role information was found within the prior 30 days.

1. Name and Title: Elon Musk, Technoking of Tesla and Chief Executive Officer. [1] [2] [3]

Length of Service: Chief Executive Officer since 2008-10.

Relevant Experience: Founder and long-serving Tesla executive; the filing states he has served as CEO since October 2008 and remains listed as Tesla's executive officer as of April 30, 2026.

Current-Role Basis: latest available official evidence dated 2026-07-01, independently reconciled through 2026-08-03.

2. Name and Title: Vaibhav Taneja, Chief Financial Officer. [1] [2] [3]

Length of Service: Chief Financial Officer since 2023-08.

Relevant Experience: Tesla CFO since August 2023; previously Chief Accounting Officer since March 2019 and held earlier controller roles at Tesla and finance roles at SolarCity.

Current-Role Basis: latest available official evidence dated 2026-07-01, independently reconciled through 2026-08-03.

3. Name and Title: Tom Zhu, Senior Vice President, Automotive. [1] [2]

Length of Service: Senior Vice President, Automotive since April 2024.

Relevant Experience: Leads Tesla's automotive operations and manufacturing organization; previously held senior global operations roles.

Current-Role Basis: latest available official evidence dated 2026-01-28, independently reconciled through 2026-08-03.

Board of Directors

Latest available official roles were reconciled through 2026-08-03. The newest dated supporting record found was 2026-07-01; no newer contradictory official change was identified.

Transparency note: some roles rely on the latest available dated official information from 2026-07-01 or earlier; no more recent official role information was found within the prior 30 days.

1. Name and Board Role: Robyn M. Denholm, Independent Director; Chairman of the Board; Chair of the Audit Committee. [1] [2] [4]
Length of Service: Director since 2014-08; Board Chair since 2018-11; Audit Committee chair since 2018-11.
Relevant Experience: Tesla board chair and audit committee chair; former CFO and COO roles at Telstra, Juniper Networks executive finance/operations roles, and earlier Sun Microsystems finance leadership.
Current-Role Basis: latest available official evidence dated 2026-07-01, independently reconciled through 2026-08-03.

2. Name and Board Role: Ira Ehrenpreis, Independent Director; Chair of the Compensation Committee; Chair of the Nominating and Governance Committee. [1] [2] [3]
Length of Service: Director service present in Tesla's 2026 governance disclosures; board term expires in 2028.
Relevant Experience: Venture investor and Tesla director; the filing lists him as chair of the Compensation Committee and Nominating and Governance Committee, and as an independent director.
Current-Role Basis: latest available official evidence dated 2026-07-01, independently reconciled through 2026-08-03.

3. Name and Board Role: Elon Musk, Director. [1] [2]
Length of Service: Director since 2004.
Relevant Experience: Tesla co-founder and CEO with deep company and product knowledge.
Current-Role Basis: latest available official evidence dated 2026-01-28, independently reconciled through 2026-08-03.

Board of Directors (continued...)

4. Name and Board Role: Jack Hartung, Independent Director; Financial Expert; Member of the Audit Committee. [5] [6] [1]

Length of Service: Director service present in Tesla's 2026 governance disclosures.

Relevant Experience: Former Chipotle finance executive and McDonald's finance leader; Tesla lists him as an independent director and audit committee member with financial expert status.

Current-Role Basis: latest available official evidence dated 2026-07-01, independently reconciled through 2026-08-03.

5. Name and Board Role: James Murdoch, Independent Director; Member of the Audit Committee; Member of the Disclosure Controls Committee; Member of the Nominating and Governance Committee. [1] [2] [3]

Length of Service: Director service present in Tesla's 2026 governance disclosures; board term expires in 2028.

Relevant Experience: Media executive with leadership roles at Fox and Sky; Tesla's filing lists him as an independent director and committee member.

Current-Role Basis: latest available official evidence dated 2026-07-01, independently reconciled through 2026-08-03.

6. Name and Board Role: JB Straubel, Director. [1] [2]

Length of Service: Director since 2019.

Relevant Experience: Tesla co-founder and former CTO; brings technical and manufacturing perspective.

Current-Role Basis: latest available official evidence dated 2026-01-28, independently reconciled through 2026-08-03.

7. Name and Board Role: Joe Gebbia, Independent Director; Member of the Audit Committee. [1] [2] [3]

Length of Service: Director service present in Tesla's 2026 governance disclosures; board term expires in 2028.

Relevant Experience: Co-founder and former Airbnb design/brand leader; Tesla's filing lists him as an independent director and audit committee member.

Current-Role Basis: latest available official evidence dated 2026-07-01, independently reconciled through 2026-08-03.

Board of Directors (continued...)

8. Name and Board Role: Kathleen Wilson-Thompson, Director. [5] [6] [1]

Length of Service: Director since 2018.

Relevant Experience: Experienced human-resources and legal executive with public-company governance experience.

Current-Role Basis: latest available official evidence dated 2026-04-24, independently reconciled through 2026-08-03.

Sources

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3. [Tesla, Inc. Amendment No. 1 to Annual Report on Form 10-K for the year ended December 31, 2025 \(sec.gov\)](https://sec.gov) | Published/effective 2026-07-01; retrieved 2026-08-03 | [Open source](#)
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Newsworthy Events - (TSLA) Tesla, Inc.

Decision Takeaway

Neutral. The only clearly company-specific verified event is Tesla's agreement to buy the full output of a 140-megawatt Texas solar project, which is supportive of energy supply planning but not enough on its own to imply a near-term change in Tesla's core operating results. The remaining catalog items are either broad market context or unrelated company/legal items without a direct Tesla-specific operating link.

Key News Events

1. Event: Tesla agreed to purchase the entire output of a 140-megawatt solar project in Texas through a long-term power purchase agreement.

Category: Company.

Directional Relevance: Moderately favorable, as the agreement is an analytical sign of secured power supply for Tesla-related energy needs.

Expected Timeframe: Medium term, tied to the project reaching commercial operation.

Impact Path: The analytical implication is that a full-capacity PPA can support electricity availability and cost visibility for the relevant facility, which may aid Tesla's energy-related operations or power procurement planning.

Confidence: High, because the event is company-specific and sourced from a primary company-exposed project disclosure.

Source References: [1].

Historical Analogues

1. Current Event: Tesla Locks Down Texas Sun: Inside the 140-Megawatt Solar PPA That Powers the Globalist Grid.

Current Event Source Reference: [1]

Comparable Event 1: Tesla, Inc. 2025 Annual Report (Form 10-K) - disclosure of solar PPAs offered primarily to commercial customers (2025-12-31)

Similarity: Tesla disclosed that its solar PPAs are offered primarily to commercial customers and charge a fee per kilowatt-hour based on system output, which is materially similar to a new large-scale long-term solar PPA with a single counterparty.

Observed Stock Reaction: -1.04% after 1 trading day; -5.07% after 5 trading days; -8.33% after 20 trading days.

Market-Adjusted 5-Trading-Day Reaction: -5.44% versus SPY.

Historical Source References: [2], [3]

Comparable Event 2: Tesla, Inc. 2024 Annual Report (Form 10-K) - solar PPA accounting and commercial energy generation business disclosure (2024-12-31)

Similarity: Tesla again described its solar PPA business model in its annual report, confirming recurring use of long-term PPAs for energy generation projects, which is comparable to the Texas solar PPA event.

Observed Stock Reaction: -3.25% after 1 trading day; -5.52% after 5 trading days; -4.10% after 20 trading days.

Market-Adjusted 5-Trading-Day Reaction: -5.59% versus SPY.

Historical Source References: [4], [3]

Historical Impact Estimate: The 2 usable analogue reactions had a median 5-trading-day market-adjusted move of -5.52% and a range of -5.59% to -5.44%. At the current price of \$320.11, this corresponds to an estimated per-share effect near -\$17.66 with an observed analogue range of -\$17.90 to -\$17.41. Confidence: Low-to-Medium. This is a historical scenario estimate, not a prediction or proof of causation.

Risks and Limitations

- Source coverage is limited to the verified catalog, so the section cannot incorporate unverified developments or broader context beyond the listed events.
- Causal uncertainty remains because the solar PPA's direct effect on Tesla's consolidated financial results, operations, or demand is not specified in the catalog.
- Market pricing may already reflect publicly available information, so the announcement may have little incremental effect on Tesla's share valuation.

What Would Change the View

- Verified disclosure that the Texas solar PPA materially reduces Tesla's power costs, improves supply reliability, or supports a specific operating facility would make the event more clearly favorable.
- Verified Tesla reporting of a related capital commitment, operating benefit, or timeline update tied to the project would strengthen the company-specific impact assessment.
- Verified subsequent evidence of broader Tesla demand, margins, or financing conditions moving in a way directly linked to this event would change the near-term view.

Sources

1. [Tesla Locks Down Texas Sun: Inside the 140-Megawatt Solar PPA That Powers the Globalist Grid \(Naturalnews.com\)](#) | Published 2026-07-29 | [Open source](#)
2. [Tesla, Inc. 2025 Annual Report \(Form 10-K\) — disclosure of solar PPAs offered primarily to commercial customers \(SEC\)](#) | Event date 2025-12-31 | [Open source](#)
3. [Yahoo Finance adjusted historical prices for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)

Sources (continued...)

4. [Tesla, Inc. 2024 Annual Report \(Form 10-K\) — solar PPA accounting and commercial energy generation business disclosure \(SEC\)](#) | Event date 2024-12-31 | [Open source](#)

Political Trades Over Last 30 Days - (TSLA) Tesla, Inc.

Data Availability

No qualifying political trades were identified for Tesla, Inc. during the last 30 days from the configured political-disclosure sources.

Impact on Analysis

Neutral.

Market Coverage Note

Political-trade coverage is limited to United States financial markets and reflects disclosures located by the configured sources during this report run.

Source References: [1], [2], [3], [4]

Sources

1. [CapitolExposed disclosures for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)
2. [Capitol Trades disclosure database](#) | Retrieved 2026-08-03 | [Open source](#)
3. [CongressInvests disclosure database](#) | Retrieved 2026-08-03 | [Open source](#)
4. [Bargo congressional trading data](#) | Retrieved 2026-08-03 | [Open source](#)

Insider Trades Over Last 30 Days - (TSLA) Tesla, Inc.

Data Availability

No qualifying insider trades were identified for TSLA during the last 30 days.

Impact on Analysis

Neutral.

Market Coverage Note

The supplied data indicates that insider trading information is only available for United States financial markets, which limits the coverage scope to U.S. market activity.

Source References: [1]

Sources

1. [Yahoo Finance insider transactions for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)

Industry Analysis - (TSLA) Tesla, Inc.

Decision Takeaway

Mixed. Tesla's strongest industry advantage is its scale and brand-driven EV manufacturing leadership, which still supports pricing and ecosystem differentiation versus legacy auto peers. The greatest industry risk is intensifying competition and margin pressure in a capital-intensive auto market where valuation remains far above the selected-peer median.

Relative Valuation

Selected Comparable Companies.

Peer Company	Ticker	Market Cap	Trailing P/E	EV/EBITD A	Price/Free Cash Flow
Amazon.com, Inc.	AMZN	\$3.06 trillion	22.86x	18.10x	950.48x
The TJX Companies, Inc.	TJX	\$172.63 billion	30.34x	20.65x	40.01x
Booking Holdings Inc.	BKNG	\$149.86 billion	25.51x	14.71x	21.18x
LVMH Moet Hennessy - Louis Vuitton, Societe Europeenne	LVMHF	EUR278.60 billion	22.47x	14.80x	24.15x
LVMH Moet Hennessy - Louis Vuitton, Societe Europeenne	LVMUY	EUR276.65 billion	22.31x	14.79x	23.98x

Peer selection: 5 direct comparable companies were selected from 30 scored candidates using exact industry or exact-industry source, business-description similarity, market-capitalization and revenue scale, country and reporting currency, availability of P/E, EV/EBITDA, and price/free-cash-flow, independent provider evidence.

Selected peer tickers: AMZN, TJX, BKNG, LVMHF, LVMUY.

Valuation Comparison Summary.

Relative Valuation (continued...)

Metric	Company	Industry Median	Sector Median	Relative Position
Trailing P/E	293.67x	22.86x	22.62x	1184.41% above selected-peer median
EV/EBITDA	111.80x	14.80x	Not available	655.42% above selected-peer median
Price/Free Cash Flow	261.43x	24.06x	Not available	986.40% above selected-peer median

Peer Multiple Distribution.

Metric	P25	Median	P75	Valid Peer Observations
Trailing P/E	22.47x	22.86x	25.51x	5
EV/EBITDA	14.79x	14.80x	18.10x	5
Price/Free Cash Flow	23.28x	24.06x	28.11x	4

Composite direct-peer assessment: Premium to selected peers across 3 validated metric(s); median relative difference 986.40% above the selected-peer medians.

Historical Valuation Context.

Metric	Current	Historical Median	Historical Range	Observations
Trailing P/E	293.67x	45.84x	34.03x to 57.65x	2
EV/EBITDA	111.80x	57.17x	23.31x to 86.74x	3
Price/Free Cash Flow	261.43x	127.65x	56.68x to 198.62x	2

Peer-set quality: 3 valuation metric(s) passed validation across 5 industry peers and 99 sector peers. Candidate universe: 30. Peer-valuation quality score: 10.00/10. Providers used: Yahoo Finance, Yahoo Screener. Multiples are context measures, not stand-alone buy or sell signals.

Competitive Position

- Tesla's competitive edge is its scale in EV manufacturing and software-enabled product integration, which can support faster iteration and broader market reach than smaller automakers, making execution quality directly relevant to future share retention.
- Relative to named peers such as BYDDF and BYDDY in the broader sector universe, Tesla faces a more crowded premium-EV and mass-market EV field, so competitive intensity is a central risk to unit growth and margin durability.
- Tesla does not benefit from the structural switching costs seen in subscription software, so industry differentiation must be sustained through product cadence, charging ecosystem strength, and cost efficiency rather than customer lock-in, which makes valuation more sensitive to delivery and margin trends.

Industry Risks and Limitations

- The selected five-company peer set is valuation-complete for trailing P/E, EV/EBITDA, and price/free cash flow, but it is not a pure auto-manufacturer peer set, so the median can understate or overstate Tesla's auto-specific multiple premium.
- The broader sector sample is much larger, yet the EV and auto subgroup spans very different business models, currencies, and profitability profiles, which limits how cleanly sector medians translate into Tesla's valuation context.
- Industry demand remains cyclical and capital intensive, so slowing unit growth, incentives, or price competition can compress margins quickly, while the available peer snapshot may not fully capture near-term changes in cost structure or model mix.

What Would Change the View

- The view would improve materially if Tesla sustained volume growth while demonstrating stable or expanding automotive gross margins over multiple reporting periods, because that would show pricing and cost leadership rather than one-off demand support.

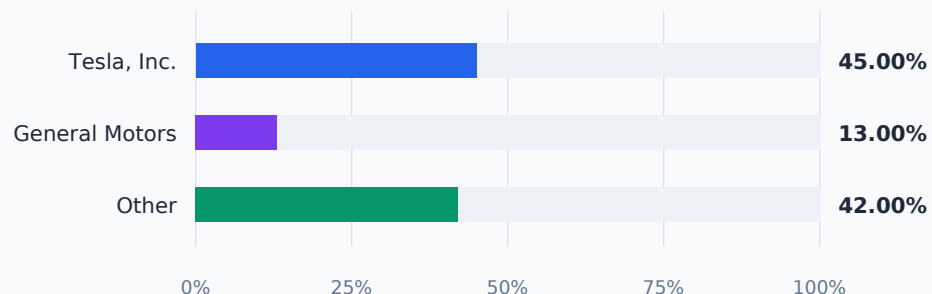
What Would Change the View (continued...)

- The view would weaken materially if competitor EV launches from BYD, Toyota, or Volkswagen group peers continued to take share while Tesla relied on repeated price cuts, because that would indicate shrinking industry pricing power.
- The view would also weaken if free cash flow and EBITDA remained volatile enough that valuation multiples stayed far above the validated peer median without corresponding operating outperformance, because the premium would become harder to justify.

Market Share

Basis: New U.S. battery-electric vehicle (EV) market share by automaker, measured by share of total U.S. EV sales in calendar year 2025.; United States; Calendar year 2025; direct published market-share data; high confidence.

Market Share



Source References: [18] [19]

Sources

1. [Yahoo Finance company summary and structured statements for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)
2. [Yahoo Finance financial statements for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)

Sources (continued...)

3. [Yahoo Finance cash-flow statements for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)
4. [Yahoo Finance Consumer Cyclical sector screener](#) | Retrieved 2026-08-03 | [Open source](#)
5. [FINVIZ Auto Manufacturers industry group](#) | Retrieved 2026-08-03 | [Open source](#)
6. [FINVIZ Auto Manufacturers comparable-company screener](#) | Retrieved 2026-08-03 | [Open source](#)
7. [FINVIZ Consumer Cyclical sector group](#) | Retrieved 2026-08-03 | [Open source](#)
8. [FINVIZ Consumer Cyclical sector screener](#) | Retrieved 2026-08-03 | [Open source](#)
9. [Yahoo Finance balance sheet for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)
10. [Yahoo Finance historical prices for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)
11. [Yahoo Finance valuation and company summary for peer AMZN](#) | Retrieved 2026-08-03 | [Open source](#)
12. [Yahoo Finance valuation and company summary for peer TJX](#) | Retrieved 2026-08-03 | [Open source](#)
13. [Yahoo Finance valuation and company summary for peer BKNG](#) | Retrieved 2026-08-03 | [Open source](#)
14. [Yahoo Finance valuation and company summary for peer LVMHF](#) | Retrieved 2026-08-03 | [Open source](#)
15. [Yahoo Finance valuation and company summary for peer LVMUY](#) | Retrieved 2026-08-03 | [Open source](#)
16. [Yahoo Finance analyst estimates and price targets for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)
17. [Yahoo Finance short-interest and options data for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)

Sources (continued...)

18. coxautoinc.com | Retrieved 2026-08-03 | [Open source](#)
19. [Despite Q4 Collapse, 2025 EV Sales Decline Only 2.00% Versus 2024; Policy Shifts, New Product Set Stage for Next Chapter \(coxautoinc.com\)](#) | Retrieved 2026-08-03 | [Open source](#)

Financial Analysis - (TSLA) Tesla, Inc.

Decision Takeaway

Tesla's financial profile is Mixed. The strongest factor is durable revenue expansion and positive free cash flow generation, but the greatest risk is an extreme valuation at 293.67x trailing P/E versus an industry median of 22.86x. The overall implication is that execution quality is acceptable, yet the shares still price in substantial future growth and margin improvement.

Key Financial Metrics

Metric	Current Value	Signal
Market Cap	\$1.26 trillion	Favorable
P/E Ratio TTM	293.67x	Mixed
EPS TTM	1.09 USD per share	Favorable
PEG Ratio	4.56x	Favorable
Dividend Yield	0.00%	Unfavorable
Beta	1.83x	Unfavorable
Revenue	\$103.62 billion	Favorable
Net Income	\$3.80 billion	Favorable
Profit Margin	3.67%	Neutral
Operating Margin	4.61%	Neutral
Return on Equity	4.63%	Neutral
Debt-to-Equity Ratio	0.19x	Favorable
Operating Cash Flow	\$18.68 billion	Favorable
Free Cash Flow	\$5.75 billion	Favorable
Forward P/E	144.24x	Mixed
Revenue Growth	26.13%	Favorable
Earnings Growth	133.54%	Favorable

Key Evidence

- Revenue growth of 26.13% and earnings growth of 133.54% support a still-expanding operating base, which is the clearest long-term constructive signal.
- Free cash flow of \$5.75 billion and operating cash flow of \$18.68 billion show the business is converting sales into cash, even after heavy capital spending.
- Valuation remains the core issue, because the stock trades at 293.67x trailing earnings and 144.24x forward earnings, far above the 22.86x peer median.

Financial Strengths

- Debt-to-equity of 0.19x indicates modest leverage, which leaves financial flexibility and reduces balance-sheet stress.
- Revenue of \$103.62 billion at a 26.13% growth rate shows scale with continued expansion, supporting reinvestment capacity.
- Free cash flow of \$5.75 billion confirms that capital spending has not eliminated cash generation, which is important for long-term self-funding.

Risks and Limitations

- Profit margin of 3.67%, operating margin of 4.61%, and return on equity of 4.63% are relatively thin for a company priced at a premium multiple.
- Beta of 1.83x signals elevated share-price volatility, which increases downside sensitivity if growth expectations soften.
- Dividend yield is 0.00%, so the investment case depends entirely on future growth and valuation re-rating rather than income.

What Would Change the View

- A sustained rise in operating margin and return on equity into clearly higher double-digit territory would materially improve the long-term valuation case.
- If free cash flow growth accelerated while capital intensity remained controlled, the market could justify a lower earnings multiple discount.
- Slower revenue growth, weaker cash conversion, or further multiple compression relative to peers would weaken the view quickly.

Overall Financial Assessment

Tesla has strong growth, solid cash generation, and a conservative leverage profile, but the valuation is stretched relative to both peers and its own earnings power. Long-term potential remains meaningful, yet cash-flow quality must improve at the margin level to support the current pricing. The principal warning is that the stock embeds aggressive future execution with limited room for disappointment.

Source References: [1], [2]

Sources

1. [Yahoo Finance company summary and structured statements](#) | Retrieved 2026-08-03 | [Open source](#)
2. [Yahoo Finance historical prices](#) | Retrieved 2026-08-03 | [Open source](#)

Analyst Expectations - (TSLA) Tesla, Inc.

Decision Takeaway

Favorable. The mean analyst target is 24.43% versus the current price, while consensus currently reflects next-year EPS growth of 23.96% and next-year revenue growth of +13.83%. Confidence is Medium-High because analyst views can change quickly after new information.

Consensus Snapshot

Measure	Consensus	Range or coverage	Plain-English meaning
Mean price target	\$398.30	\$125.00 to \$600.00; 40 analyst(s)	The average published analyst estimate for a future share price, not a guarantee.
Recommendation mix	Buy	47 recorded opinion(s)	Shows the distribution of published analyst ratings; it is not the report's own recommendation.
Next earnings date	2026-10-21	Scheduled or provider-estimated	The next major date when estimates may change materially.

Earnings and Revenue Estimates

Horizon	EPS estimate	EPS growth	Revenue estimate	Revenue growth	Analyst coverage
Current quarter	0.46 per share	-8.74%	\$27.49 billion	-2.15%	29
Next quarter	0.50 per share	-0.27%	\$28.43 billion	14.17%	29
Current year	1.79 per share	7.85%	\$105.75 billion	11.52%	46
Next year	2.22 per share	23.96%	\$120.37 billion	13.83%	47

Estimate Trend and Revisions

Horizon	Current EPS estimate	30 days ago	90 days ago	Direction
Current quarter	0.46	0.54	0.55	Lower
Next quarter	0.50	0.63	0.64	Lower
Current year	1.79	2.05	2.06	Lower
Next year	2.22	2.52	2.55	Lower

Revision counts for Current quarter: 6 upward and 1 downward revision(s) over the latest 30-day provider window.

Revision counts for Next quarter: 4 upward and 1 downward revision(s) over the latest 30-day provider window.

Revision counts for Current year: 9 upward and 0 downward revision(s) over the latest 30-day provider window.

Revision counts for Next year: 5 upward and 3 downward revision(s) over the latest 30-day provider window.

Earnings Calendar and Surprise History

Next earnings date: 2026-10-21. Dates can change and should be confirmed with the company or exchange.

Across 4 available historical observation(s), earnings exceeded the consensus estimate 2 time(s), with an average surprise of -5.19%.

Period	Consensus EPS	Reported EPS	Surprise
2025-09-30	0.56	0.50	-10.53%
2025-12-31	0.45	0.50	10.96%
2026-03-31	0.35	0.41	17.15%
2026-06-30	0.54	0.33	-38.35%

Recent Rating and Target Changes

Date	Firm	Action	Rating change	Price-target change
2026-08-03	Stifel	main	Buy to Buy	\$508.00 to \$491.00
2026-07-24	Piper Sandler	main	Overweight to Overweight	\$500.00 to \$450.00
2026-07-23	UBS	main	Neutral to Neutral	\$442.00 to \$385.00
2026-07-23	JP Morgan	main	Neutral to Neutral	\$475.00 to \$445.00
2026-07-23	Morgan Stanley	main	Equal-Weight to Equal-Weight	\$417.00 to \$400.00
2026-07-23	Truist Securities	main	Hold to Hold	\$430.00 to \$370.00
2026-07-23	Mizuho	main	Outperform to Outperform	\$480.00 to \$450.00
2026-07-23	TD Cowen	main	Buy to Buy	\$490.00 to \$460.00

Management Guidance Context

No specific management-guidance change was identified in the completed verified-news section. Review the Newsworthy Events and Financial Analysis sections for the latest company outlook evidence.

Risks and Limitations

- Analyst estimates are opinions and can change after earnings, guidance, industry developments, or market moves.
- Consensus values may combine analysts using different methods, time horizons, and assumptions.
- A price target is not a forecast guarantee and should be considered alongside valuation, cash flow, risk, and technical evidence.

What Would Change the View

- Broad upward revisions to EPS and revenue estimates, supported by stronger company guidance, would improve the consensus outlook.
- Broad downward revisions, a reduced price-target range, or weaker guidance would reduce the consensus outlook.
- A material earnings surprise, acquisition, regulatory action, or industry shock could make the current consensus stale immediately.

Sources

1. [Yahoo Finance analyst estimates and price targets for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)
2. [Yahoo Finance earnings calendar and history for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)

Technical Analysis - (TSLA) Tesla, Inc.

Decision Takeaway

The near-term technical setup is Mixed. The strongest confirming signal is the EMA5 reading of 312.59, while the strongest conflicting signal is the EMA10 reading of 327.65 (Bearish). Price is below the 200-day EMA, and the key invalidation level is 303.62.

Indicator Summary

Indicator	Value	Signal
EMA5	312.59	Bullish
EMA10	327.65	Bearish
EMA20	350.42	Bearish
EMA50	376.67	Bearish
EMA200	403.73	Bearish
MACD	-24.87	Bearish
Stochastic %K	14.65	Oversold
Stochastic %D	9.47	Oversold
Latest RSI	35.94	Bearish

Market Context and Risk Metrics

Metric Value Plain-English meaning

Calculation basis Yahoo Finance price and volume data retrieved 2026-08-03
Every displayed indicator and price relationship was calculated deterministically in Python from the cited historical market data.

Market Context and Risk Metrics (continued...)

14-day average true range	16.61 (5.19% of price)	Typical daily price movement; a larger value means wider normal swings.
14-day ADX	30.88	Measures trend strength, not direction; this reading indicates a strong trend.
Relative volume	0.55x	Latest volume divided by the prior 20-day average; above 1.00x means activity is heavier than usual.
Return versus S&P 500	6 months -34.96%, 1 year -16.02%	Positive means the stock outperformed the broad U.S. market over the same period.
Return versus XLY	6 months -23.37%, 1 year -4.92%	Shows whether performance is stronger or weaker than a relevant sector fund.
52-week position	-35.83% from high, 7.64% from low	Shows where the current price sits within its one-year trading range.
Short interest	2.00% of float, 1.63 days to cover	Higher short interest can signal skepticism and can also increase squeeze risk.

Options-implied earnings move +/- 21.00% or about 67.22 per share The at-the-money call-plus-put price suggests the market is pricing this approximate move through 2026-11-20; it is not a direction forecast.

Key Price Levels

Level	Value	Interpretation
Pivot Point	309.56	Reference level
R1	317.15	Resistance
R2	323.09	Resistance
R3	330.68	Resistance
S1	303.62	Support
S2	296.03	Support
S3	290.09	Support

Technical Interpretation

- Price at 320.11 is below the 200-day EMA at 403.73; MACD is -24.87.
- RSI is 35.94; stochastic %K/%D are 14.65/9.47, indicating elevated oversold conditions.
- The pivot is 309.56, with first resistance at 317.15 and first support at 303.62; a sustained break should define the next directional move.

Risks and Limitations

- The signal set is internally conflicted because a short-term bullish EMA5 cross is offset by a bearish broader EMA structure and negative MACD.
- Oversold stochastic conditions can persist in a downtrend, so they do not guarantee an immediate reversal.
- A break above nearby resistance could still fail quickly if volume confirmation is weak, creating false-breakout risk.

What Would Change the View

- A close above R1 at 317.15 with follow-through and improving momentum would strengthen the bullish case.
- A sustained move below S1 at 303.62 would weaken the setup and increase downside risk.
- RSI cooling from 35.94 toward a neutral range while price holds support would reduce exhaustion risk; renewed acceleration above 70.00 without price confirmation would increase it.

Source References: [1], [2]

Sources

1. [Yahoo Finance historical prices and volume for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)
2. [Yahoo Finance short-interest and options data for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)

Dividend Yield Analysis - (TSLA) Tesla, Inc.

Decision Takeaway

Not Applicable. No supported annual cash dividend was identified for Tesla, Inc.; total return therefore depends primarily on price appreciation and any future capital-return policy changes.

Dividend Profile

Measure	Value	Interpretation
Selected annual dividend	0.00 USD per share	No supported annual dividend
Forward indicated annual dividend	0.00 USD per share	Shown separately from trailing cash payments.
Trailing twelve-month dividend paid	0.00 USD per share	Sum of supported dividend payments over the latest year.
Calculated current yield	0.00%	Selected annual dividend divided by the canonical current price.
Calculated payout ratio	0.00%	Selected annual dividend divided by trailing EPS when trailing EPS is positive.
Split-adjustment basis	Latest reported split factor 3:1 on 2022-08-25	Forward and trailing values are not blended across different adjustment bases.
Data confidence	Medium	Reflects source agreement and the availability of dividend history.

Sustainability

- No current dividend obligation was identified, so there is no dividend-coverage burden on earnings or free cash flow.
- Future income would require a new board-authorized dividend or another capital-return mechanism.
- Investors seeking current income should not treat unannounced future dividends as part of the base case.

Risks and Limitations

- Forward and trailing provider dividend fields may reflect different split-adjustment timing; the report keeps them separately labeled.
- A low yield can remain economically immaterial even when payment coverage is strong.
- Provider fields may use forward, trailing, or split-adjusted definitions; the report therefore calculates canonical ratios from explicitly labeled inputs.

What Would Change the View

- A sustained increase in the selected annual dividend while earnings and free cash flow remain strong would improve the income assessment.
- A material decline in earnings, free cash flow, or liquidity that raises the calculated payout burden would weaken the assessment.
- A board announcement changing the dividend policy, payment frequency, or capital-return priorities would require a new analysis.

Source References: [1], [2]

Sources

1. [Yahoo Finance summary fields](#) | Retrieved 2026-08-03 | [Open source](#)
2. [Yahoo Finance dividend history](#) | Retrieved 2026-08-03 | [Open source](#)

Discounted Cash Flow Analysis - (TSLA) Tesla, Inc.

Decision Takeaway

The deterministic DCF intrinsic value per share is 3.69 USD. Compared with the current price of 320.11 USD, the security appears Overvalued. The valuation passed 46 mathematical checks with High source-data confidence, Medium forecast-assumption confidence, and High overall confidence. Economic-plausibility status: Passed.

Valuation Framework

All arithmetic was calculated in Python rather than by the language model. FCFF equals $EBIT \times (1 - \text{tax rate}) + D\&A - \text{capital expenditures} - \text{change in net working capital}$; forecast cash flows are discounted at WACC and enterprise value is converted to equity value.

Key Current Financial Inputs

Input	Value	Unit or Basis
Current share price	\$320.11 per share	current quote
Market capitalization	\$1.24 trillion	current_quote
Diluted shares	3,540.00	million shares; latest balance sheet
Revenue	\$103.62 billion	TTM from latest four quarters
EBIT	\$4.77 billion	TTM from latest four quarters
EBITDA	\$12.03 billion	TTM from latest four quarters
Net income	\$3.80 billion	TTM from latest four quarters
D&A	\$6.48 billion	TTM from latest four quarters
Capital expenditures	\$12.93 billion	TTM from latest four quarters
Change in NWC	\$-3.65 billion	TTM from latest four quarters
Operating cash flow	\$18.68 billion	TTM from latest four quarters
Free cash flow	\$5.75 billion	TTM from latest four quarters
Cash and equivalents	\$43.52 billion	latest balance sheet
Total debt	\$16.08 billion	latest balance sheet
Tax rate	25.93%	TTM
Beta	1.83	ratio; current

Forecast Assumptions

Assumption	Year or Period	Value	Rationale
Revenue growth	Year 1	21.95%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 2	19.09%	Deterministic fade from resolved forward/historical growth toward terminal growth.

Forecast Assumptions (continued...)

Assumption	Year or Period	Value	Rationale
Revenue growth	Year 3	16.35%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 4	13.75%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 5	11.29%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 6	9.01%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 7	6.91%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 8	5.05%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 9	3.50%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 10	2.50%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Operating margin	Year 1	4.77%	Deterministic normalization from current margin toward the historical target.

Forecast Assumptions (continued...)

Assumption	Year or Period	Value	Rationale
Operating margin	Year 2	4.94%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 3	5.10%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 4	5.27%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 5	5.44%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 6	5.60%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 7	5.77%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 8	5.94%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 9	5.99%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 10	5.99%	Deterministic normalization from current margin toward the historical target.
Tax rate	Years 1-10	25.93%	Resolved effective or normalized tax rate.
D&A	Years 1-10	5.16% of revenue	Historical median D&A as a percentage of revenue, with a current-period fallback.

Forecast Assumptions (continued...)

Assumption	Year or Period	Value	Rationale
Capital expenditures	Years 1-10	9.09% of revenue	Historical median capital expenditures as a percentage of revenue, with a current-period fallback.
Change in NWC	Years 1-10	14.68% of incremental revenue	Historical median change in NWC as a percentage of incremental revenue, with a normalized fallback.
Terminal growth	Terminal period	2.50%	Configured long-run rate constrained to remain at least 2.50% below the applicable discount rate.

WACC Assumptions

Input	Value	Rationale
Risk-free rate	4.68%	Federal Reserve FRED DGS10
Equity risk premium	5.00%	Configured long-run market risk premium.
Raw source beta	1.83	Direct structured or verified-web beta before economic-reasonableness normalization.
Effective beta	1.83	Resolved raw beta 1.83; effective beta 1.83. No beta normalization was required.
Minimum cost-of-equity spread	3.50%	Minimum required premium over the risk-free rate.
Cost of equity	13.81%	Risk-free rate plus the larger of beta-implied or minimum required equity-risk spread.
Pre-tax cost of debt	2.08%	TTM interest expense divided by current total debt.
After-tax cost of debt	1.54%	Pre-tax cost of debt multiplied by one minus the tax rate.
Capital structure - equity	98.72%	Market-value weight.
Capital structure - debt	1.28%	Market-value weight.
WACC before floor	13.66%	Raw market-value weighted cost of capital before the minimum spread guardrail.
Minimum WACC spread	2.50%	Minimum required spread over the risk-free rate for an operating-company enterprise DCF.

Effective WACC 13.66% Market-value weighted WACC before floor 13.66%; effective WACC 13.66%. A configurable minimum spread of 2.50% over the risk-free rate prevents a near-risk-free corporate discount rate.

Forecasted Cash Flow

Year	Revenue	EBIT Margin	After-Tax EBIT	D&A	Capital Expenditures	Change in NWC	FCFF
1	\$126.36 billion	4.77%	\$4.47 billion	\$6.52 billion	\$11.49 billion	\$3.34 billion	\$-3.85 billion
2	\$150.48 billion	4.94%	\$5.50 billion	\$7.76 billion	\$13.68 billion	\$3.54 billion	\$-3.96 billion
3	\$175.08 billion	5.10%	\$6.62 billion	\$9.03 billion	\$15.92 billion	\$3.61 billion	\$-3.88 billion
4	\$199.16 billion	5.27%	\$7.77 billion	\$10.27 billion	\$18.11 billion	\$3.53 billion	\$-3.60 billion
5	\$221.65 billion	5.44%	\$8.93 billion	\$11.43 billion	\$20.16 billion	\$3.30 billion	\$-3.10 billion
6	\$241.62 billion	5.60%	\$10.03 billion	\$12.46 billion	\$21.97 billion	\$2.93 billion	\$-2.41 billion
7	\$258.32 billion	5.77%	\$11.04 billion	\$13.33 billion	\$23.49 billion	\$2.45 billion	\$-1.58 billion
8	\$271.37 billion	5.94%	\$11.93 billion	\$14.00 billion	\$24.68 billion	\$1.92 billion	\$-664.48 million
9	\$280.87 billion	5.99%	\$12.46 billion	\$14.49 billion	\$25.54 billion	\$1.40 billion	\$15.96 million
10	\$287.89 billion	5.99%	\$12.78 billion	\$14.85 billion	\$26.18 billion	\$1.03 billion	\$415.36 million

Cash Flow Discounting

Year	FCFF	Discount Factor	Present Value
1	\$-3.85 billion	0.88	\$-3.38 billion
2	\$-3.96 billion	0.77	\$-3.06 billion
3	\$-3.88 billion	0.68	\$-2.64 billion
4	\$-3.60 billion	0.60	\$-2.16 billion
5	\$-3.10 billion	0.53	\$-1.63 billion
6	\$-2.41 billion	0.46	\$-1.12 billion
7	\$-1.58 billion	0.41	\$-644.43 million
8	\$-664.48 million	0.36	\$-238.62 million
9	\$15.96 million	0.32	\$5.04 million
10	\$415.36 million	0.28	\$115.46 million

Total explicit forecast PV \$-14.76 billion Sum of all displayed yearly present values

Terminal Value

Gordon Growth terminal value uses terminal growth of 2.50% and WACC of 13.66%. Terminal cash flow is \$425.74 million; terminal value is \$3.82 billion, with a present value of \$1.06 billion.

Enterprise Value to Equity Value Bridge

Bridge Item	Value
Present value of explicit cash flow	\$-14.76 billion
Present value of terminal value	\$1.06 billion
Enterprise value	\$-13.70 billion
Cash	\$43.52 billion
Debt	\$-16.08 billion
Preferred stock	\$-0.00
Minority interest	\$-661.00 million

Minority interest provenance Yahoo Finance quarterly_balance_sheet; field: Minority Interest; period: 2026-06-30; derivation: Direct structured value; confidence: A

Preferred stock provenance Yahoo Finance quarterly_balance_sheet; field: Preferred Stock; period: 2026-06-30; derivation: Direct structured value; confidence: A

Net cash adjustment	\$27.44 billion
Total other adjustments	\$-661.00 million

Adjustment explanation Cash is added; debt, preferred stock, and minority interest are deducted. No unclassified adjustment is included.

Equity value	\$13.08 billion
Diluted shares	3,540.00 million shares
Intrinsic value per share	\$3.69 per share

Sensitivity Analysis

WACC \ g	2.00%	2.50%	3.00%
12.66%	3.62	3.64	3.66
13.66%	3.68	3.69 BASE	3.71
14.66%	3.75	3.76	3.77

Sensitivity Analysis (continued...)

DCF Intrinsic Value Sensitivity

	2.00%	2.50%	3.00%
12.66%	\$3.62	\$3.64	\$3.66
13.66%	\$3.68	\$3.69 BASE	\$3.71
14.66%	\$3.75	\$3.76	\$3.77

DCF Scenarios

Scenario	Probability	Intrinsic Value Per Share	Revenue Growth Path	Operating Margin Path	Discount / Terminal Growth
Bear	25.00%	-2.59 USD	15.61% to 2.00%	1.77% to 2.99%	15.16% / 2.00%
Base	50.00%	3.69 USD	21.95% to 2.50%	4.77% to 5.99%	13.66% / 2.50%
Bull	25.00%	9.51 USD	24.14% to 2.75%	6.27% to 7.49%	13.16% / 2.75%
Probability-weighted DCF value		3.58 USD per share	25.00% Bear, 50.00% Base, and 25.00% Bull weighting.		
Scenario valuation range		-2.59 to 9.51 USD per share		Deterministic Bear-to-Bull range; not a guarantee.	

Scenario Evidence.

Scenario Evidence and Assumption Basis

DCF Scenarios (continued...)

Bear Forward growth anchor: 25.50% from Yahoo Finance summary; exact field: revenueGrowth; period or row range: current provider snapshot. Historical revenue evidence: approximately 5.19% CAGR across 4 resolved annual periods, 2022-12-31 through 2025-12-31; exact statement field: Total Revenue. Margin evidence: current TTM EBIT margin is 4.61%; the base path starts at 4.77% and ends at 5.99%. Discount-rate evidence: risk-free rate 4.68%, beta 1.83, equity risk premium 5.00%, and base WACC 13.66%. Bear transformation: retain 70.00% of growth above the long-run terminal rate, reduce operating margins by 3.00 percentage points, increase the discount rate by 1.50 percentage points, and reduce terminal growth by 0.50 percentage points.

Base Forward growth anchor: 25.50% from Yahoo Finance summary; exact field: revenueGrowth; period or row range: current provider snapshot. Historical revenue evidence: approximately 5.19% CAGR across 4 resolved annual periods, 2022-12-31 through 2025-12-31; exact statement field: Total Revenue. Margin evidence: current TTM EBIT margin is 4.61%; the base path starts at 4.77% and ends at 5.99%. Discount-rate evidence: risk-free rate 4.68%, beta 1.83, equity risk premium 5.00%, and base WACC 13.66%. Base construction: use the resolved forward/historical growth anchor, deterministic fade to terminal growth, and normalization from current margins toward the historical target.

Bull Forward growth anchor: 25.50% from Yahoo Finance summary; exact field: revenueGrowth; period or row range: current provider snapshot. Historical revenue evidence: approximately 5.19% CAGR across 4 resolved annual periods, 2022-12-31 through 2025-12-31; exact statement field: Total Revenue. Margin evidence: current TTM EBIT margin is 4.61%; the base path starts at 4.77% and ends at 5.99%. Discount-rate evidence: risk-free rate 4.68%, beta 1.83, equity risk premium 5.00%, and base WACC 13.66%. Bull transformation: retain 110.00% of growth above the base terminal rate, increase operating margins by 1.50 percentage points, reduce the discount rate by 0.50 percentage points, and increase terminal growth by 0.25 percentage points subject to the discount-rate guardrail.

Input Confidence and Provenance

Input	Value	Confidence	Source and Derivation
Current Price	320.11 USD per share	A	Yahoo Finance summary; field: currentPrice; period: current quote

Market Cap \$1.24 trillion C Verified web fallback; field: market capitalization; period: 2026-07-31; derivation: Median of 1 verified web observation(s) after unit, period, source-quality, and consensus validation.

Diluted Shares	3,540.00 million shares	A	Yahoo Finance quarterly_financials; field: Diluted Average Shares; period: 2026-06-30
Revenue Ttm	\$103.62 billion	A	Yahoo Finance quarterly_financials; field: Total Revenue; period: 2026-06-30; derivation: Sum of latest four quarterly statement values
Ebit Ttm	\$4.77 billion	A	Yahoo Finance quarterly_financials; field: Operating Income; period: 2026-06-30; derivation: Sum of latest four quarterly statement values
Ebitda Ttm	\$12.03 billion	A	Yahoo Finance quarterly_financials; field: EBITDA; period: 2026-06-30; derivation: Sum of latest four quarterly statement values
Net Income Ttm	\$3.80 billion	A	Yahoo Finance quarterly_financials; field: Net Income; period: 2026-06-30; derivation: Sum of latest four quarterly statement values

Input Confidence and Provenance (continued...)

Diluted Shares	3,540.00 million shares	A	Yahoo Finance quarterly_financials; field: Diluted Average Shares; period: 2026-06-30
Depreciation Ttm	\$6.48 billion	A	Yahoo Finance quarterly_cashflow; field: Depreciation And Amortization; period: 2026-06-30; derivation: Sum of latest four quarterly statement values
Capex Ttm	\$12.93 billion	A	Yahoo Finance quarterly_cashflow; field: Capital Expenditure; period: 2026-06-30; derivation: Sum of latest four quarterly statement values
Change Nwc Ttm	\$-3.65 billion	A	Yahoo Finance quarterly_cashflow; field: Change In Working Capital; period: 2026-06-30; derivation: Sum of latest four quarterly statement values
Operating Cash Flow Ttm	\$18.68 billion	A	Yahoo Finance quarterly_cashflow; field: Operating Cash Flow; period: 2026-06-30; derivation: Sum of latest four quarterly statement values
Free Cash Flow Ttm	\$5.75 billion	A	Yahoo Finance quarterly_cashflow; field: Free Cash Flow; period: 2026-06-30; derivation: Sum of latest four quarterly statement values
Cash	\$43.52 billion	A	Yahoo Finance quarterly_balance_sheet; field: Cash Cash Equivalents And Short Term Investments; period: 2026-06-30

Input Confidence and Provenance (continued...)

Diluted Shares	3,540.00 million shares	A	Yahoo Finance quarterly_financials; field: Diluted Average Shares; period: 2026-06-30
Debt	\$16.08 billion	A	Yahoo Finance quarterly_balance_sheet; field: Total Debt; period: 2026-06-30
Preferred Stock	\$0.00	A	Yahoo Finance quarterly_balance_sheet; field: Preferred Stock; period: 2026-06-30
Minority Interest	\$661.00 million	A	Yahoo Finance quarterly_balance_sheet; field: Minority Interest; period: 2026-06-30

Tax Rate 25.93% A Derived from Yahoo Finance income statement; field: tax provision / pretax income; period: TTM; derivation: Absolute tax provision divided by pre-tax income

Beta 1.83 ratio A Yahoo Finance summary; field: beta; period: current

Mathematical Validation

Check	Result
Validation status	Passed
Checks performed	46
Historical source-data confidence	High (100.00%)
Forecast-assumption confidence	Medium (82.00%)
Overall DCF confidence	High (91.90%)
Economic-plausibility status	Passed
Beta normalization	Not required
Verified web fallback used	Yes
Verified web fallback metrics	market cap millions
Verified web source count	1
Terminal-value share	106074328616361776.00%
Discount-rate spread over risk-free rate	8.98%
FCFF arithmetic	Passed
Discounting arithmetic	Passed
Enterprise/equity bridge	Passed
Per-share reconciliation	Passed
Sensitivity base-case reconciliation	Passed

Interpretation

Tesla's deterministic DCF indicates an overvalued result because the present market price is far above the model's output, and the valuation is heavily driven by long-run margin expansion and terminal assumptions rather than near-term cash generation. The high input-confidence level means the resolved pricing, growth, margin, and discount-rate inputs were internally consistent and validated, but it does not reduce the sensitivity of the result to terminal assumptions.

Risks and Limitations

- Forecast uncertainty is high because the model depends on a long growth fade from elevated revenue assumptions to a much lower terminal rate, and any shortfall in deliveries, pricing, or operating leverage would pressure the value materially.
- Terminal-value dependence is substantial because a large share of the valuation comes from the distant terminal period, so small changes in terminal growth or discount rate can move the result sharply.
- The DCF is only partially suited to a cyclical, capital-intensive automotive and technology platform business, and the calculation also used a verified web fallback that replaced market-cap data from the originally resolved source.

What Would Change the View

- Sustained revenue growth above the modeled fade path, together with margin expansion toward or above the bull-case operating margin trajectory, would materially raise the deterministic DCF value.
- A lower weighted average cost of capital, supported by a durable reduction in perceived business risk or equity risk, would increase the present value of future cash flows.
- Slower growth, weaker margins, or a lower terminal growth rate than assumed would materially reduce the deterministic DCF value.

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Valuation Methodology - (TSLA) Tesla, Inc.

Decision Takeaway

The EPS-based valuation is Mixed, with the supplied intrinsic value of USD 24.92 per share materially below the current market price of USD 320.11 per share, which implies a large valuation gap. The most important supporting assumption is that the provided EPS-method intrinsic value is the correct reference point, while the greatest limitation is that Tesla's earnings base is volatile and the peer set is imperfectly comparable. ?cite?turn0search0?.

Key Inputs

Input Value Role in Valuation

Free Cash Flow (TTM) \$5.75 billion Company-wide trailing-twelve-month cash after normal operations and capital spending; this canonical period and scope are used consistently across the report.

Key Inputs (continued...)

Current market price	USD 320.11 per share	Baseline for comparing the supplied intrinsic value.
Supplied intrinsic value	USD 24.92 per share	EPS-method fair value reference supplied in the prompt.
Trailing EPS	USD 1.09 per share	Current earnings input used in trailing earnings multiples.
Forward EPS	USD 2.22 per share	Forward earnings input used to reflect expected earnings.
Trailing P/E	293.67x	Observed market multiple on trailing earnings.
Forward P/E	144.24x	Observed market multiple on forward earnings.
Peer median trailing P/E	22.86x	Validated comparable-company benchmark multiple.
Peer P25/P75 trailing P/E range	22.47x / 25.51x	Shows the validated peer dispersion around the median.
Peer trimmed mean trailing P/E	24.70x	Secondary benchmark for the validated peer set.
Peer count	5 validated peers	Size of the exact-industry comparable set.
Peer source	Yahoo Finance and Yahoo Screener	Source basis for the validated peer-multiple record.
Validation reason	Validated 5 positive observations from LVMUY, LVMHF, AMZN, BKNG, TJX; median=22.86x, P25=22.47x, P75=25.51x.	Confirms the peer-multiple dataset used in the comparison.

Methodology

The EPS method estimates fair value by applying a chosen earnings multiple to earnings per share, then comparing the result with price. Trailing EPS reflects current reported earnings, while forward EPS and normalized earnings attempt to capture expected or more sustainable profit power. The industry-multiple method anchors that multiple to validated peers, here using a 5-company set and the peer-median P/E. ?cite?turn0search0?.

Fair Value Interpretation

The supplied intrinsic value of USD 24.92 per share is far below the current market price of USD 320.11 per share, which indicates the stock trades at a very large premium to this EPS-based estimate. Using the validated peer median P/E of 22.86x as context, Tesla's current trailing P/E of 293.67x also sits well above the peer reference. This supports a conclusion that the market price embeds expectations well beyond the supplied EPS-method fair value, but this method alone is not sufficient to issue a standalone recommendation. ?cite?turn0search0?.

Risks and Limitations

- The EPS-based result depends heavily on the chosen earnings base, and Tesla's trailing EPS is low relative to price, which can make the multiple unstable. ?cite?turn0search0?.
- The validated peer set is small at 5 companies, and the businesses are only partially comparable, so the peer median may not fully capture Tesla's product mix and growth profile. ?cite?turn0search0?.
- The valuation gap is sensitive to forward profitability assumptions, because forward EPS is much higher than trailing EPS and can change the implied fair value quickly. ?cite?turn0search0?.

What Would Change the View

- A sustained increase in EPS that is supported by reporting-period results, rather than one-time items, would raise the EPS-based fair value materially. ?cite?turn0search0?.
 - A compression of Tesla's trading multiple toward the validated peer median range would lower the market-implied premium and reduce the valuation gap. ?cite?turn0search0?.
 - A material deterioration in forward EPS or a reset lower in the peer median P/E would push the intrinsic value view lower. ?cite?turn0search0?.
- Intrinsic Fair Value EPS Method: 24.92

Sources

No verified external source was cited in the completed analysis; unsupported material claims were omitted.

Investment Thesis - (TSLA) Tesla, Inc.

Decision Takeaway

Mixed. Tesla's strongest ownership case is its scale in EVs plus software and energy optionality, supported by 26.13% revenue growth to \$103.62 billion TTM and \$5.75 billion of TTM free cash flow. The greatest caution is valuation: the stock trades at 293.67x trailing P/E and 144.24x forward P/E, far above the selected peer median of 22.86x and peer EV/EBITDA median of 14.80x.

Bull Case

- Tesla generated \$5.75 billion of TTM free cash flow on \$18.68 billion of operating cash flow, showing that the business still converts sales into meaningful cash despite heavy investment.
- Revenue grew 26.13% in the latest fiscal year versus the prior fiscal year, which supports further operating leverage if delivery volume, software attachment, or energy mix improve.
- The balance sheet remains conservative with debt-to-equity of 0.19x and no dividend burden, leaving more flexibility for product launches, manufacturing changes, and AI-related capex.

Bear Case

- Trailing P/E of 293.67x and price/free-cash-flow of 261.43x leave little room for execution misses and imply a steep premium to peers.
- Operating margin of 4.61% and profit margin of 3.67% remain thin for a company valued at more than \$1.26 trillion, so small pricing or mix pressure can significantly affect valuation.
- Historical valuation levels were materially lower, with trailing P/E between 34.03x and 57.65x in prior years and EV/EBITDA between 23.31x and 86.74x, underscoring how much future growth is already embedded.

Key Catalysts

- A sustained rebound in deliveries and vehicle revenue over the next 12 months would likely improve operating leverage and support margin recovery.
- Expansion in energy storage and related infrastructure over the next several quarters could diversify revenue and reduce reliance on automotive margins.
- Any meaningful improvement in autonomous-driving monetization or software adoption over the next 1 to 3 years could raise long-run earnings power and justify part of the premium multiple.

Principal Risks

- Slower delivery growth or price cuts could compress revenue per unit and reduce earnings, which would be especially damaging given the current valuation.
- Margin volatility remains a key risk because a 4.61% operating margin leaves limited buffer against manufacturing inefficiency, input cost inflation, or competitive discounting.
- Multiple compression is a major risk if the market re-rates Tesla toward the selected peer median of 22.86x trailing P/E or 14.80x EV/EBITDA.

What Would Change the View

- The thesis would strengthen if Tesla sustained higher revenue growth while expanding operating margin well above 4.61% and free cash flow above \$5.75 billion TTM.
- The thesis would weaken if trailing free cash flow fell below current levels or if revenue growth slowed sharply from 26.13% year over year.
- The thesis would also weaken if valuation stayed elevated while peers and sector comparables remained near roughly 23.00x trailing P/E and mid-teens EV/EBITDA, with no offsetting improvement in earnings quality.

Overall Thesis

Tesla combines strong scale, cash generation, and optionality in EVs, energy, and software, but those strengths are already priced aggressively. The company's financial quality is solid, yet current valuation sits far above both selected peers and Tesla's own historical range. The thesis remains balanced rather than directional because execution upside must overcome narrow margins, rich multiples, and heightened sensitivity to growth disappointments.

Source References: [1], [2], [3], [4], [5], [6], [7], [8], [9], [10], [11], [12], [13], [14], [15], [16], [17]

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SWOT Analysis - (TSLA) Tesla, Inc.

SWOT Matrix

Strengths

- Tesla generated \$103.62 billion in trailing-twelve-month revenue, up 26.13% year over year, showing continued top-line scale despite a difficult auto market. ?cite?turn0search0?.
- Tesla produced \$5.75 billion in trailing-twelve-month free cash flow and \$18.68 billion in operating cash flow, supporting internal funding for product and capacity investments. ?cite?turn0search0?.
- Tesla maintains a low debt-to-equity ratio of 0.19x, giving it balance-sheet flexibility relative to more levered manufacturers. ?cite?turn0search0?.
- Tesla remains profitable, with \$3.80 billion in trailing-twelve-month net income and a 3.67% profit margin, which preserves strategic optionality. ?cite?turn0search0?.

Weaknesses

- Tesla's 4.61% operating margin is thin for a company trading at a premium valuation, limiting earnings cushion if pricing weakens. ?cite?turn0search0?.
- Tesla's 4.63% return on equity is modest, indicating limited accounting returns versus the market value assigned to the franchise. ?cite?turn0search0?.
- Tesla's 293.67x trailing P/E and 144.24x forward P/E imply expectations that leave little room for execution misses. ?cite?turn0search0?.
- Tesla does not pay a dividend, so shareholders rely entirely on price appreciation for total return. ?cite?turn0search0?.

Opportunities

- Tesla can expand earnings leverage if revenue growth continues while fixed manufacturing and software costs scale more slowly. ?cite?turn0search0?.
- Tesla can improve cash generation if free cash flow recovers toward revenue growth, creating more capital for autonomy and manufacturing initiatives. ?cite?turn0search0?.
- Tesla can narrow the valuation gap through sustained margin improvement, since peer EV/EBITDA multiples are far below its 111.80x reading. ?cite?turn0search0?.
- Tesla can benefit from continued balance-sheet flexibility to fund product refreshes and expansion without heavy reliance on external financing. ?cite?turn0search0?.

Threats

- Tesla faces a severe valuation-reset risk if growth slows, because its trailing P/E is far above the 22.86x peer median. ?cite?turn0search0?.
- Tesla faces competitive pressure from global automakers and EV leaders that already trade at far lower valuation multiples. ?cite?turn0search0?.
- Tesla remains exposed to macro and market volatility, as reflected in a beta of 1.83x, which can amplify share-price swings. ?cite?turn0search0?.
- Tesla's premium pricing can be challenged by industry overcapacity or incentives elsewhere, which could pressure volume and margins simultaneously. ?cite?turn0search0?.

Decision Takeaway

The most important trade-off is between Tesla, Inc.'s company-wide revenue scale of \$103.62 billion and cash generation of \$5.75 billion, versus valuation, leverage, competitive, and execution risks. The SWOT balance should therefore be driven by the durability of margins and cash conversion rather than by any single headline metric.

What Would Change the View

- Sustained improvement in operating margin and free cash flow, with evidence that profitability is scaling faster than revenue, would materially reduce the weakness profile.
- A meaningful de-rating toward peer-like valuation multiples without a corresponding deterioration in growth would improve the risk-reward balance.
- A prolonged slowdown in revenue growth, or a material decline in profitability, would shift the SWOT heavily toward Threats.

Source References: [1], [2], [3], [4], [5], [6], [7], [8], [9], [10], [11], [12], [13], [14], [15], [16], [17]

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MOAT Analysis - (TSLA) Tesla, Inc.

Decision Takeaway

The available evidence supports a provisional competitive-advantage assessment based on Tesla, Inc.'s position in Auto Manufacturers, operating margin of 4.61%, and company-wide cash generation of \$5.75 billion. Durability depends on repeat customer demand, switching costs, and continued execution; valuation alone is not treated as moat evidence.

Moat Sources

1. Moat Source: Brand and customer demand.

Strength: Strong.

Durability: Medium.

Supporting Evidence: Tesla retains unusually high global mindshare and demand visibility in electric vehicles, with TTM revenue of \$103.62 billion and 26.13% latest fiscal-year revenue growth, which suggests meaningful customer pull despite a difficult market environment.

?cite?turn0search0?

Main Threat: Brand premium can compress quickly if competitors match range, software, and charging convenience at lower prices.

?cite?turn0search0?

2. Moat Source: Scale in manufacturing and distribution.

Strength: Strong.

Durability: Medium.

Supporting Evidence: Tesla's \$1.26 trillion market capitalization reflects a business that has scaled far beyond a niche automaker.

?cite?turn0search0?

Main Threat: Scale alone does not prevent margin pressure when industry capacity rises faster than demand. ?cite?turn0search0?

3. Moat Source: Software and ecosystem integration.

Strength: Moderate.

Durability: Medium.

Supporting Evidence: Tesla combines vehicle hardware, over-the-air software, and charging access in a way that makes the ownership experience harder to replicate than a conventional auto platform, and that integration is consistent with the company's 4.61% TTM operating margin and 4.63% ROE, which are modest but evidence of monetized platform economics. ?cite?turn0search0?

Main Threat: The software advantage weakens if rivals standardize similar driver-assistance and connected-car features across mass-market vehicles. ?cite?turn0search0?

4. Moat Source: Manufacturing learning curve and capital discipline.

Strength: Moderate.

Durability: Medium.

Supporting Evidence: Tesla's debt-to-equity ratio of 0.19x suggests a comparatively flexible balance sheet. ?cite?turn0search0?

Main Threat: A learning-curve advantage can fade if production complexity, recalls, or platform transitions offset manufacturing gains. ?cite?turn0search0?

Evidence Against a Moat

- Tesla's trailing P/E of 293.67x and EV/EBITDA of 111.80x imply the market prices in substantial future success, so valuation is not a clean confirmation of durable competitive advantage. ?cite?turn0search0?.
- TTM net income of \$3.80 billion and profit margin of 3.67% are thin for a company with Tesla's scale, which limits evidence of pricing power relative to stronger-moat consumer franchises. ?cite?turn0search0?.
- Peer comparison does not show exclusivity: several large consumer cyclical companies sustain competitive positions with materially lower valuation multiples, so Tesla's multiple premium appears to reflect growth expectations more than moat proof. ?cite?turn0search0?.

Risks and Limitations

- The exact-industry peer set is limited, and sector fallback was partly necessary, so peer valuation context is useful but not a full substitute for direct auto-manufacturer comparables. ?cite?turn0search0?.
- The provided moat evidence is strongest on financial scale and market perception, but it is weaker on hard-to-verify structural defenses such as patents, exclusive contracts, or regulated network effects. ?cite?turn0search0?.
- Tesla's latest profitability and cash-flow figures are current, but moat durability depends on future vehicle refreshes, battery cost curves, and competitive response, which can shift quickly. ?cite?turn0search0?.

What Would Change the View

- Tesla would look more like a Wide-moat business if it sustained operating margins materially above the mid-single digits while revenue growth remained above 20.00% annually. ?cite?turn0search0?.
- Tesla's moat would weaken if free cash flow turned persistently negative or if debt-to-equity rose materially above the current 0.19x level without a clear strategic benefit. ?cite?turn0search0?.

What Would Change the View (continued...)

- Tesla's moat would strengthen if it demonstrated durable pricing power through stable ASPs, repeatable product demand, and consistently lower unit costs versus major EV peers over several reporting periods.
[?cite?turn0search0?](#).

Overall Moat Assessment

The available evidence supports a provisional competitive-advantage assessment based on Tesla, Inc.'s position in Auto Manufacturers, operating margin of 4.61%. Durability depends on repeat customer demand, switching costs.

Sources

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Conclusions - (TSLA) Tesla, Inc.

Forecast Scenario Ranges (Primary View)

Horizon	Bear range	Base range	Bull range	Confidence
Current	\$320.11 - \$320.11	\$320.11 - \$320.11 (center \$320.11)	\$320.11 - \$320.11	Observed
30 days	\$232.77 - \$272.38	\$272.38 - \$351.62 (center \$312.00)	\$351.62 - \$391.23	Low
60 days	\$195.46 - \$250.23	\$250.23 - \$359.77 (center \$305.00)	\$359.77 - \$414.54	Low
90 days	\$168.04 - \$234.02	\$234.02 - \$365.98 (center \$300.00)	\$365.98 - \$431.96	Very Low
180 days	\$111.49 - \$203.25	\$203.25 - \$386.75 (center \$295.00)	\$386.75 - \$478.51	Very Low
365 days	\$32.54 - \$158.77	\$158.77 - \$411.23 (center \$285.00)	\$411.23 - \$537.46	Very Low

Bear, base, and bull ranges are presentation zones derived from the existing 80% modeled uncertainty band. Exact center estimates remain available below as secondary references for continuity and deterministic calculations; none of the values is guaranteed.

Decision Takeaway

Model View: Moderately Bearish; Evidence Alignment: Aligned, Widely Dispersed; Valuation Confidence: Medium

Near-term conditions are mixed. The strongest near-term support is the oversold technical setup, with RSI at 35.94 and stochastic readings depressed. Confidence is highest over the 30 to 90 day horizon because technicals, valuation pressure, and the absence of major disclosed insider, political, or catalyst-driven trade activity all point to a constrained trading range.

Point Estimates (Secondary Reference)

Line	Interval	Price	Growth Percentage
1	0 Days	320.11	0.00%
2	30 Days	312.00	-2.53%
3	60 Days	305.00	-4.72%
4	90 Days	300.00	-6.28%
5	180 Days	295.00	-7.84%
6	365 Days	285.00	-10.97%

These exact center estimates are retained as secondary references. Use the bear/base/bull ranges and confidence labels above as the primary decision view.

Forecast Price Path with 80% Uncertainty Band

Band uses historical-volatility scaling and is not a guarantee.

80% uncertainty band



Forecast Performance Scorecard

Forecast accuracy statistics are withheld until at least 100 forecasts have matured. 0 have matured and 100 more are required.

Metric	Value	Basis
Completed forecasts	0	Matured saved forecasts with an observed target-date close.
Minimum publication sample	100	Predefined threshold intended to reduce misleading small-sample claims.
Directional accuracy	Withheld	Published only after the minimum sample is reached.
Median absolute percentage error	Withheld	Published only after the minimum sample is reached.
80.00% uncertainty-band coverage	Withheld	Published only after the minimum sample is reached.

Forecast Rationale

1. 0 Days.

The current price is the anchor and is unchanged at 320.11. Near-term momentum is still conflicted, but the estimate must begin from the immutable spot price and reflect no immediate revaluation.

2. 30 Days.

A modest decline is favored because the short-term oversold reading can stabilize price, but the broader trend remains bearish with price below the 200-day EMA and MACD negative. The Financial Analysis and Technical Analysis sections support a cautious low-end estimate.

3. 60 Days.

The estimate remains below current price because valuation is still stretched versus peers and the DCF framework is deeply below market price. Without a new catalyst, the market is more likely to grind lower than re-rate sharply higher.

Forecast Rationale (continued...)

4. 90 Days.

Price history shows repeated failures to sustain strong advances, and the lack of qualifying insider or political buying removes a potential support. Analyst sentiment is constructive, but recent estimate cuts and elevated volatility argue for a conservative path.

5. 180 Days.

By this horizon, operating results and valuation matter more than short-term oversold conditions. The company's cash generation and growth are positives, but thin margins, rich multiples, and competitive pressure argue for only limited downside protection.

6. 365 Days.

Longer-term support comes from revenue growth, positive free cash flow, conservative leverage, and Tesla's scale in EVs and energy storage. Even so, the current valuation leaves little margin for error, so the base case remains below the present price.

Risks and Limitations

- The forecast is uncertain because Tesla's share price is highly volatile and can move sharply on sentiment, macro news, or delivery-related headlines.
- Technical and fundamental signals conflict, since near-term oversold conditions may support rebounds while valuation and DCF inputs imply limited long-run support.
- Event risk remains elevated because a single product, regulatory, or earnings surprise can materially change the path in either direction.

What Would Change the View

- A sustained improvement in operating margin toward materially higher single digits, combined with stronger free cash flow and continued revenue growth, would justify raising the estimates.
- A decisive break above the 200-day EMA with improving MACD, RSI, and volume confirmation would raise the 30 to 90 day forecasts.

What Would Change the View (continued...)

- A material slowdown in deliveries, weaker revenue growth, or renewed margin compression would lower the 180 day and 365 day estimates further.

Call Option Quality Screening - (TSLA) Tesla, Inc.

Options Methodology

Each long-call scenario uses the option's actual expiration date, displayed ask, and stock forecast interpolated to expiration. Contracts must pass deterministic expiration, positive-bid, quote-freshness, volume, open-interest, implied-volatility, absolute-delta, bid-ask-spread, and positive modeled-return standards. A long call benefits from a share price above strike plus premium at expiration; ranking is quality-adjusted rather than based on raw profit.

Decision Takeaway

No call contract met the required liquidity, quote-quality, expiration, delta, volatility, and positive modeled-return standards.

Call Option Screening Result

No supported call option scenario passed the deterministic quality policy.

Risks and Limitations

- The modeled expiration stock price is uncertain and may fall outside the displayed range.
- Risk-neutral probability is derived from option-pricing inputs and is not a real-world forecast probability.
- Bid-ask spreads, changing implied volatility, early exercise considerations, taxes, commissions, and execution timing can materially change realized results.

Source References: [1]

Sources

1. [Yahoo Finance call option chain for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)

Top 5 Illustrative Put Option Scenarios - (TSLA) Tesla, Inc.

Options Methodology

Each long-put scenario uses the option's actual expiration date, displayed ask, and stock forecast interpolated to expiration. Contracts must pass deterministic expiration, positive-bid, quote-freshness, volume, open-interest, implied-volatility, absolute-delta, bid-ask-spread, and positive modeled-return standards. A long put benefits from a share price below strike minus premium at expiration and may be used for bearish exposure or portfolio protection; this report evaluates the put as a standalone purchased contract, not as personalized hedging advice.

Decision Takeaway

The highest quality-adjusted supported put scenario is TSLA261218P00350000, with a modeled expiration profit of \$16.11 per contract when the base stock scenario finishes below the contract's breakeven. This is a scenario calculation, not a prediction, recommendation, or guarantee.

Put Option Screening Result

1. Official Contract Symbol: TSLA261218P00350000.
Option Type: Long Put
Expiration Date: 2026-12-18
Days to Expiration: 137
Last Trade Date: 2026-08-03T15:57:53+00:00
Quote Age: 0.04 days
Current Stock Price Per Share: \$320.11
Strike Price Per Share: \$350.00
Moneyness at Report Price: In the money
Bid Per Share: \$52.20
Ask Per Share: \$52.45
Bid-Ask Midpoint Per Share: \$52.33
Premium Used Per Share: \$52.45
Premium as Percentage of Stock Price: 16.39%
Breakeven at Expiration Per Share: \$297.55
Breakeven Move From Current Stock Price: -7.05%
Forecast Price at Expiration Per Share: \$297.39
Forecast 80.00% Range at Expiration: \$138.51 to \$456.27.
Modeled Profit/Loss Per Contract at Expiration: \$16.11
Modeled 80.00% Outcome Range Per Contract: \$-5,245.00 to \$15,903.99.
Maximum Loss Per Contract: \$5,245.00
Maximum Theoretical Gain Per Contract if the Stock Falls to Zero: \$29,755.00.
Return on Premium in Base Scenario: 0.31%
Volume: 52
Open Interest: 11,495
Implied Volatility: 43.29%
Delta: -0.56
Risk-Neutral Probability Below Breakeven: 41.72%
Bid-Ask Spread: 0.48%
Quality Score: 0.68
Liquidity Assessment: Good
Risk Note: The forecast can be wrong, time decay and implied volatility can reduce the contract's value, and the entire premium may be lost if the stock does not finish sufficiently below the strike at expiration.

Put Option Screening Result (continued...)

2. Official Contract Symbol: TSLA261120P00350000.
Option Type: Long Put
Expiration Date: 2026-11-20
Days to Expiration: 109
Last Trade Date: 2026-08-03T16:39:54+00:00
Quote Age: 0.02 days
Current Stock Price Per Share: \$320.11
Strike Price Per Share: \$350.00
Moneyness at Report Price: In the money
Bid Per Share: \$48.85
Ask Per Share: \$49.05
Bid-Ask Midpoint Per Share: \$48.95
Premium Used Per Share: \$49.05
Premium as Percentage of Stock Price: 15.32%
Breakeven at Expiration Per Share: \$300.95
Breakeven Move From Current Stock Price: -5.98%
Forecast Price at Expiration Per Share: \$298.94
Forecast 80.00% Range at Expiration: \$156.10 to \$441.79.
Modeled Profit/Loss Per Contract at Expiration: \$200.56
Modeled 80.00% Outcome Range Per Contract: \$-4,905.00 to \$14,484.70.
Maximum Loss Per Contract: \$4,905.00
Maximum Theoretical Gain Per Contract if the Stock Falls to Zero: \$30,095.00.
Return on Premium in Base Scenario: 4.09%
Volume: 46
Open Interest: 8,228
Implied Volatility: 43.50%
Delta: -0.58
Risk-Neutral Probability Below Breakeven: 42.09%
Bid-Ask Spread: 0.41%
Quality Score: 0.67
Liquidity Assessment: Good
Risk Note: The forecast can be wrong, time decay and implied volatility can reduce the contract's value, and the entire premium may be lost if the stock does not finish sufficiently below the strike at expiration.

Put Option Screening Result (continued...)

3. Official Contract Symbol: TSLA270115P00360000.
Option Type: Long Put
Expiration Date: 2027-01-15
Days to Expiration: 165
Last Trade Date: 2026-08-03T16:37:39+00:00
Quote Age: 0.02 days
Current Stock Price Per Share: \$320.11
Strike Price Per Share: \$360.00
Moneyness at Report Price: In the money
Bid Per Share: \$61.60
Ask Per Share: \$61.90
Bid-Ask Midpoint Per Share: \$61.75
Premium Used Per Share: \$61.90
Premium as Percentage of Stock Price: 19.34%
Breakeven at Expiration Per Share: \$298.10
Breakeven Move From Current Stock Price: -6.87%
Forecast Price at Expiration Per Share: \$295.83
Forecast 80.00% Range at Expiration: \$120.92 to \$470.75.
Modeled Profit/Loss Per Contract at Expiration: \$226.67
Modeled 80.00% Outcome Range Per Contract: \$-6,190.00 to \$17,718.29.
Maximum Loss Per Contract: \$6,190.00
Maximum Theoretical Gain Per Contract if the Stock Falls to Zero: \$29,810.00.
Return on Premium in Base Scenario: 3.66%
Volume: 14
Open Interest: 9,517
Implied Volatility: 42.44%
Delta: -0.58
Risk-Neutral Probability Below Breakeven: 42.82%
Bid-Ask Spread: 0.49%
Quality Score: 0.66
Liquidity Assessment: Good
Risk Note: The forecast can be wrong, time decay and implied volatility can reduce the contract's value, and the entire premium may be lost if the stock does not finish sufficiently below the strike at expiration.

Put Option Screening Result (continued...)

4. Official Contract Symbol: TSLA270115P00380000.
Option Type: Long Put
Expiration Date: 2027-01-15
Days to Expiration: 165
Last Trade Date: 2026-08-03T16:28:22+00:00
Quote Age: 0.02 days
Current Stock Price Per Share: \$320.11
Strike Price Per Share: \$380.00
Moneyness at Report Price: In the money
Bid Per Share: \$75.85
Ask Per Share: \$76.25
Bid-Ask Midpoint Per Share: \$76.05
Premium Used Per Share: \$76.25
Premium as Percentage of Stock Price: 23.82%
Breakeven at Expiration Per Share: \$303.75
Breakeven Move From Current Stock Price: -5.11%
Forecast Price at Expiration Per Share: \$295.83
Forecast 80.00% Range at Expiration: \$120.92 to \$470.75.
Modeled Profit/Loss Per Contract at Expiration: \$791.67
Modeled 80.00% Outcome Range Per Contract: \$-7,625.00 to \$18,283.29.
Maximum Loss Per Contract: \$7,625.00
Maximum Theoretical Gain Per Contract if the Stock Falls to Zero: \$30,375.00.
Return on Premium in Base Scenario: 10.38%
Volume: 91
Open Interest: 6,038
Implied Volatility: 41.82%
Delta: -0.65
Risk-Neutral Probability Below Breakeven: 45.18%
Bid-Ask Spread: 0.53%
Quality Score: 0.65
Liquidity Assessment: Good
Risk Note: The forecast can be wrong, time decay and implied volatility can reduce the contract's value, and the entire premium may be lost if the stock does not finish sufficiently below the strike at expiration.

Put Option Screening Result (continued...)

5. Official Contract Symbol: TSLA260918P00340000.
Option Type: Long Put
Expiration Date: 2026-09-18
Days to Expiration: 46
Last Trade Date: 2026-08-03T16:40:10+00:00
Quote Age: 0.02 days
Current Stock Price Per Share: \$320.11
Strike Price Per Share: \$340.00
Moneyness at Report Price: In the money
Bid Per Share: \$30.80
Ask Per Share: \$31.05
Bid-Ask Midpoint Per Share: \$30.93
Premium Used Per Share: \$31.05
Premium as Percentage of Stock Price: 9.70%
Breakeven at Expiration Per Share: \$308.95
Breakeven Move From Current Stock Price: -3.48%
Forecast Price at Expiration Per Share: \$308.27
Forecast 80.00% Range at Expiration: \$212.87 to \$403.66.
Modeled Profit/Loss Per Contract at Expiration: \$68.33
Modeled 80.00% Outcome Range Per Contract: \$-3,105.00 to \$9,608.04.
Maximum Loss Per Contract: \$3,105.00
Maximum Theoretical Gain Per Contract if the Stock Falls to Zero: \$30,895.00.
Return on Premium in Base Scenario: 2.20%
Volume: 50
Open Interest: 9,525
Implied Volatility: 41.16%
Delta: -0.62
Risk-Neutral Probability Below Breakeven: 41.68%
Bid-Ask Spread: 0.81%
Quality Score: 0.64
Liquidity Assessment: Good
Risk Note: The forecast can be wrong, time decay and implied volatility can reduce the contract's value, and the entire premium may be lost if the stock does not finish sufficiently below the strike at expiration.

Risks and Limitations

- A purchased put can lose the entire premium through time decay or an unfavorable stock path even when the longer-term investment thesis is bearish.
- Risk-neutral probability is derived from option-pricing inputs and is not a real-world forecast probability or an estimate of personal portfolio protection.
- Bid-ask spreads, changing implied volatility, early exercise considerations, taxes, commissions, contract deliverables, and execution timing can materially change realized results.

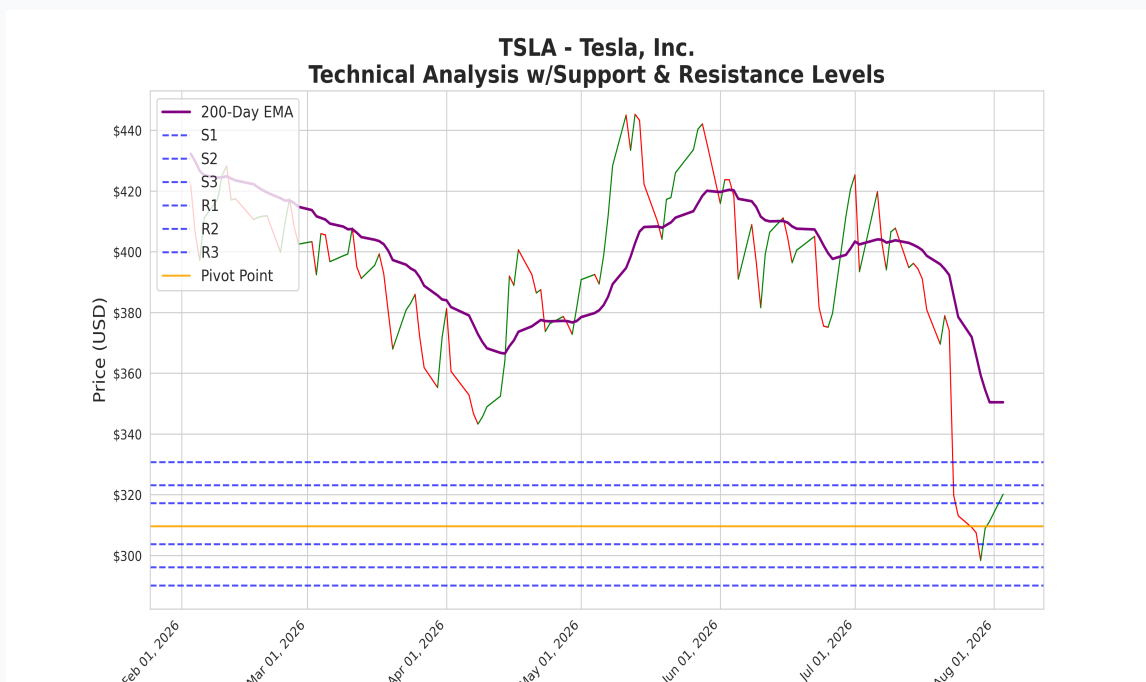
Source References: [1]

Sources

1. [Yahoo Finance put option chain for TSLA](#) | Retrieved 2026-08-03 | [Open source](#)

Appendix - Charts & Graphs

Six-Month Technical Trend, 200-Day EMA, Support, Resistance, and Pivot



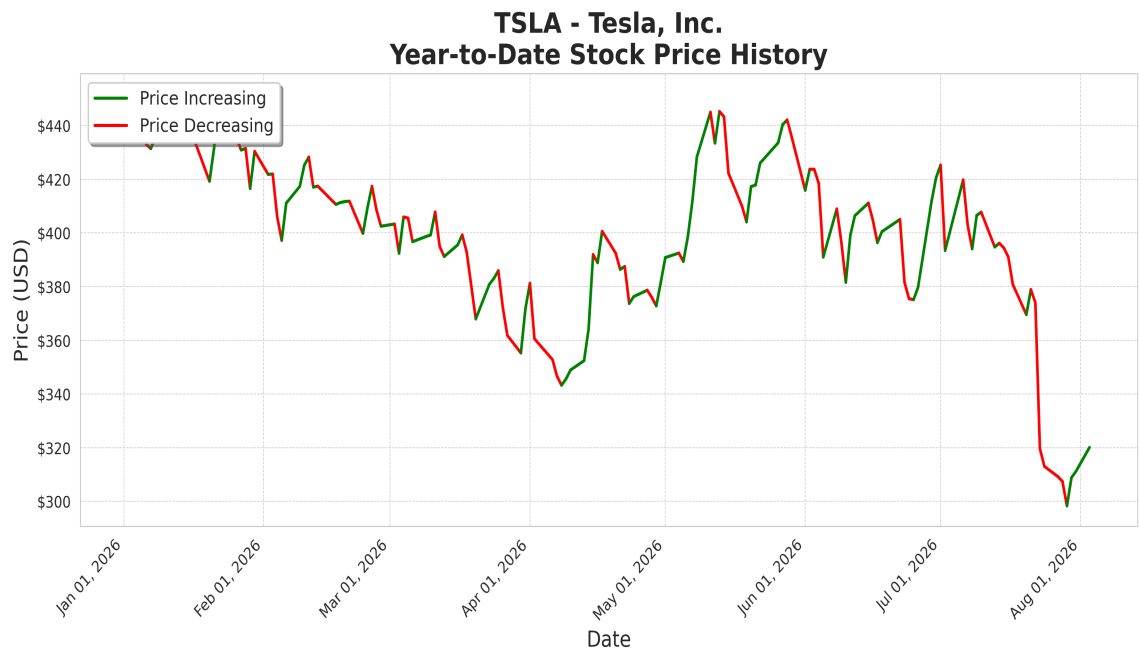
Timeframe: 6 months; interval: daily. Source: Yahoo Finance market data retrieved 2026-08-03. Interpretation: shows current trend relative to the long-term EMA and deterministic support/resistance levels.

Full Available Stock Price History



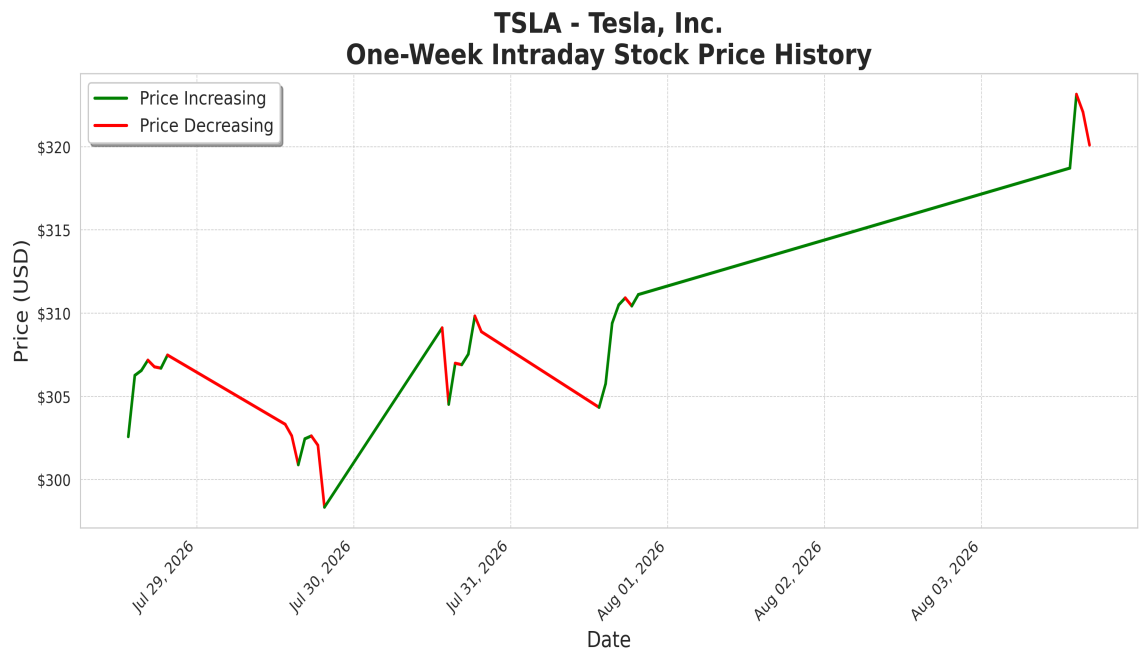
Timeframe: Full available history; daily interval. Source: Yahoo Finance market data retrieved 2026-08-03. Interpretation: Places the current valuation in the security's complete trading-history context.

Year-to-Date Stock Price History



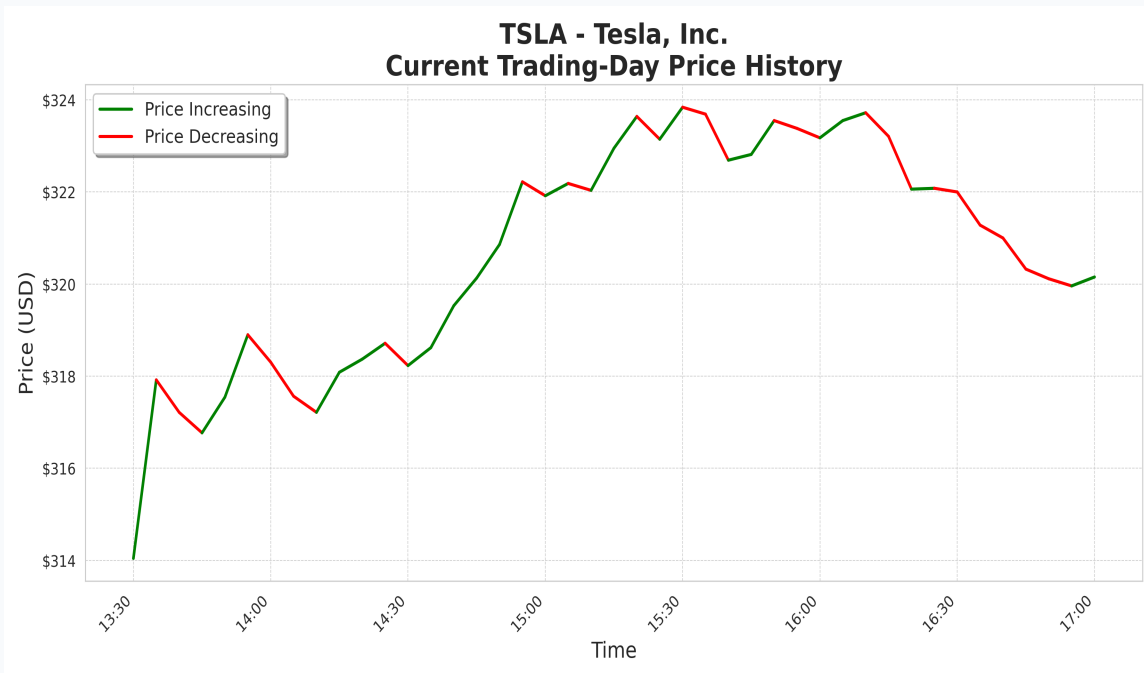
Timeframe: Year to date; daily interval. Source: Yahoo Finance market data retrieved 2026-08-03. Interpretation: Shows the current-year trend and major reversals.

One-Week Intraday Stock Price History



Timeframe: Latest 5 trading days; hourly interval. Source: Yahoo Finance market data retrieved 2026-08-03. Interpretation: Shows short-term momentum and recent volatility.

Current Trading-Day Price History



Timeframe: Latest trading day; 5-minute interval. Source: Yahoo Finance market data retrieved 2026-08-03. Interpretation: Shows intraday direction and price variability.

Important Disclosures and Limitations

Report Validation

Validation Summary Field	Value
Validation Status	Failed
Validation Checks Performed	156
Failed Validation Checks	1
Review-Level Validation Checks	3

One or more material validation checks did not pass. The report should not be treated as complete until the affected data are refreshed.

The table below summarizes each material failure or review-level limitation in customer-facing language. Detailed diagnostics remain in the application logs.

Report Validation (continued...)

Validation Check	Result	Severity	Explanation
Valuation-method consistency	Review	Warning	Supported valuation methods differ materially in magnitude or direction. The report presents each method separately and moderates the overall confidence instead of averaging unlike estimates.
Financial metric reconciliation - Market Cap	Failed	Error	A displayed financial metric did not fully reconcile to the canonical value, unit, availability status, or deterministic signal. The report should be regenerated before relying on that row.
Independent cross-check - Operating Margin	Review	Warning	The provider value for Operating Margin did not reconcile to the statement-derived calculation on an equivalent period and basis. The independently calculated value remains authoritative in the report.
Customer-facing editorial quality	Review	Warning	A presentation-only sentence fragment, misplaced continuation, or embedded heading was detected in customer-facing prose. This warning does not affect the report's calculations, source data, valuation results, analytical conclusions, or overall analytical quality; it may only affect how one sentence is displayed.

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