Earnings report worksheet (PDF)

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Fill in for each quarter you review. Use the company's filing for the numbers.

Company and period

Company, ticker and quarter _____

Filing used (8-K release / 10-Q / 10-K) and date _____

Key figures

Item	This quarter	Same quarter last year	Change
Revenue			
Gross margin %			
Operating margin %			
GAAP EPS			
Adjusted EPS			
Operating cash flow			
Free cash flow			
Cash and debt			
Diluted share count			

Guidance and notes

Guidance: raised / kept / cut, and by how much _____

Main items excluded from adjusted EPS _____

Risks or changes mentioned in MD&A _____

My conclusion in one sentence _____

Sources: SEC Investor.gov: How to read a 10-K/10-Q; 17 CFR § 244.100 (Regulation G): Non-GAAP financial measures (Cornell LII); SEC: EDGAR company filings search; SEC Investor.gov: Earnings per share. Full explanation and links: https://uxs.nz/stocks/how-to-read-an-earnings-report/

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