

Ticker: **ODP US EQUITY**

ODP Corp/The (NASDAQ GS: ODP, Currency: USD)

Sector: Productos de consumo no básico Industry: Ventas especializadas Sub-Industry: Otras ventas minoristas especi

Website	www.officedepot.com
Number of Employees	20,000
Ticker:	ODP US

6600 North Military Trail Boca Raton, FL 33496 United States
Phone : 1-561-438-4800
Fax : 1-561-265-4400

38.52 -0.44 (-1.13%)

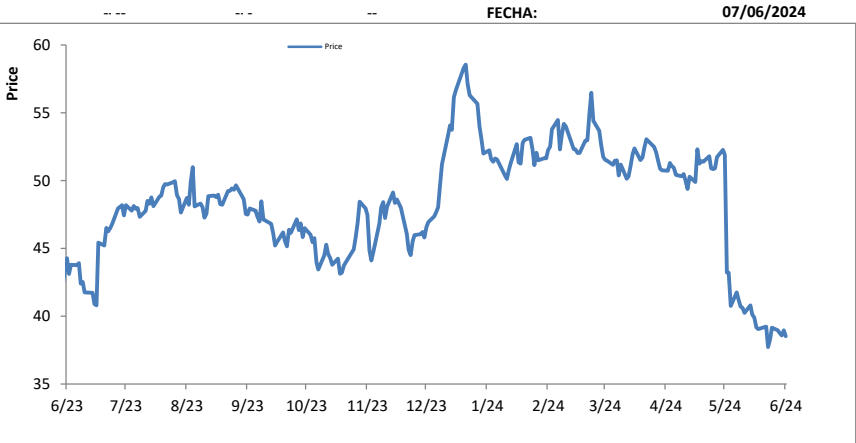
The ODP Corporation is a holding company which operates in the USA. Its subsidiaries include The Office Depot Inc, which operates a chain of office product warehouse stores in North America, Europe, Asia, and Central America. The Company sells branded merchandise and provides business services primarily to small and medium-sized businesses and the home office market.

Stock Quote & Chart (Currency: USD)

Last (delayed quote)	38.52	Market Cap (MM)	1,382.7
Open	38.83	Shares Out. (MM)	35.9
Previous Close	38.96	Float %	96.2%
Change	0.37	Shares sold short (MM)	3,948,201.0
Change %	0.96	Dividend Yield %	--
Day High/Day Low	39.1 / 38.5	Diluted EPS Excl. XO	
52 Wk High/52 Wk low	59.0 / 37.6	P / Diluted EPS Before XO	
Volume (MM)	0.40	Beta	0.82
Avg. Vol - 3 mo (MM)	0.42		

Financial Information (Currency: USD, in mm)

Revenue - LTM	7,594.0	Cash & ST Invest.	392
EBIT - LTM	124.0	Total Assets	3,886.0
EBITDA - LTM	238.0	Total Debt	1,236.0
Net Income - LTM	82.0	Total Liabilities	2,785.0
Total Enterprise Value	2,017	Total Equity	1,101.0
TEV/ Total Revenue	0.3 x	Cash from Operations - LTM	212.0
TEV/ EBITDA	10.7 x	Cash From Investing - LTM	-5.0
		Cash from Financing -LTM	-267.0



Company Notes

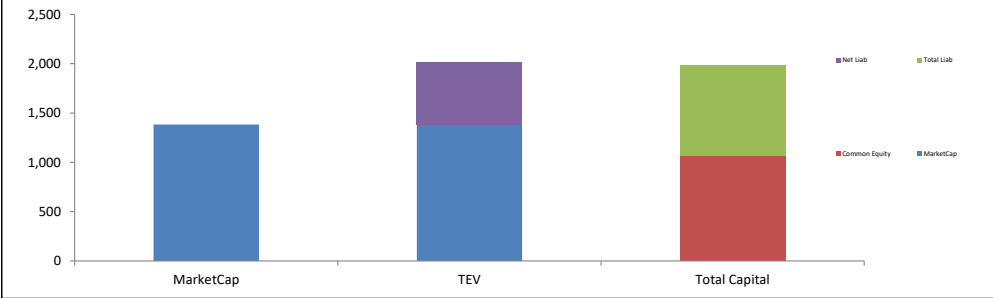
A loss of \$187.000 from Asset Write Down
A loss of \$56.000 from Restructuring
A loss of \$26.000 from Other One Time Items
A gain of \$343.000 from Sale of Investments
2015 Q1
GAAP Net Income Includes: (in millions, pre-tax)
A loss of \$1.140.000 from Restructuring & Integration
A loss of \$148.000 from Sale of Investment
A loss of \$9.000 from Other one time charges
2014 A1
GAAP Net Income Includes: (in millions, pre-tax)
A loss of \$127.000 from Restructuring
A gain of \$543.000 from Sale of Investments
A gain of \$276.000 from Other One Time Items
2014 Q4
GAAP Net Income Includes: (in millions, pre-tax)
A loss of \$127.000 from Restructuring
A gain of \$308.000 from Sale of Investments
A gain of \$358.000 from Other One Time Items
a loss of \$0.050 per share from Tax Adjustments
2014 Q3
GAAP Net Income Includes: (in millions, pre-tax)
A loss of \$16.000 from Other One Time Items
A gain of \$106.000 from Sale of Investments

Key Board Members

Name	Title	Organization
1 Joseph Stephen Vassalluzzo	Board Member	Olly Shoes
2	Board Member	Zoots Inc
3	Chairman	The Odp Corp
4 Amy L Schioldager	Executive Vice President	Ishares Us Etf Trust
5	Board Member	Corebridge Financial Inc
6	Board Member	Intermediate Capital Group Plc
7	Vice Chairman	Juma Ventures
8	Board Member	Boardspan Inc
9 Cynthia Todd Jamison	Chairman	Darden Restaurants Inc
#	Chairman	Big Lots Inc
#	Board Member	The Odp Corp
# Quincy L Allen	Board Member	Lumen Technologies Inc
#	Board Member	Abm Industries Inc
#	Board Member	The Odp Corp
#	Board Member	Launch New York Inc
# Wendy Lee Schoppert	Board Member	Davita Inc
#	Board Member	Big Lots Inc
#	Trustee	Breck School
#	Board Member	Nina Hale Consulting Inc
#	Board Member	The Odp Corp
# Gerry P Smith	Chief Executive Officer	The Odp Corp
#	Board Member	Arrow Electronics Inc
# Shashank Shankar Samant	Senior Managing Exec Officer	Hitachi Ltd
#	Lead Director	Rackspace Technology Inc
#	Board Member	Eureka Forbes Ltd
#	Chairman	Globallogic Inc
#	Board Member	The Odp Corp
# Kristin A Campbell	Board Member	Regency Centers Corp
#	Board Member	The Odp Corp

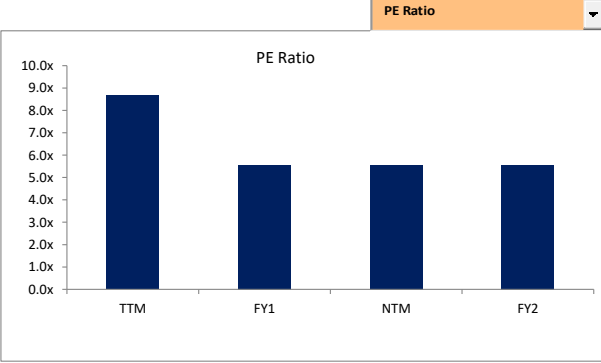
Ticker: ODP US EQUITY		ODP Corp/The										
Period Type		Annuals		Sector: Productos de consumo no básico			Industry: Ventas especializadas		Sub-Industry: Otras ventas minoristas especi			
Annuals												
FY	-6FY	-5FY	-4FY	-3FY	-2FY	-1FY	0FY	-0FQ	1FY	2FY	3FY	
Key Financials												
	Actuals							LTM	Estimates			
For the Fiscal Period Ending	30/12/2017	29/12/2018	28/12/2019	26/12/2020	25/12/2021	31/12/2022	30/03/2024	30/03/2024	31/12/2024	31/12/2025	31/12/2026	
Currency	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD
Total Revenue	10,240.0	11,015.0	9,667.0	8,872.0	8,465.0	8,491.0	7,831.0	1,871.0	7,831.0	1,762.7	1,762.7	
Growth Over Prior Year	(7.1%)	7.6%	(12.2%)	(8.2%)	(4.6%)	0.3%	(7.8%)	(9.8%)	(7.6%)	(7.6%)	(7.6%)	
Gross Profit	2,461.0	2,551.0	2,255.0	1,951.0	1,863.0	1,848.0	1,766.0	1,695.0	--	--	--	
Margin %	24.0%	23.2%	23.3%	22.0%	22.0%	21.8%	22.6%	90.6%	--	--	--	
EBITDA	486.0	446.0	806.0	563.0	728.0	706.0	640.0	238.0	90.5	90.5	90.5	
Margin %	4.7%	4.0%	8.3%	6.3%	8.6%	8.3%	8.2%	12.7%	1.2%	5.1%	5.1%	
EBIT	327.0	254.0	224.0	6.0	234.0	243.0	201.0	124.0	60.1	60.1	60.1	
Margin %	3.2%	2.3%	2.3%	0.1%	2.8%	2.9%	2.6%	6.6%	0.8%	3.4%	3.4%	
Earnings from Cont. Ops.	146.0	99.0	127.0	(63.0)	187.0	178.0	139.0	82.0	--	--	--	
Margin %	1.4%	0.9%	1.3%	(0.7%)	2.2%	2.1%	1.8%	4.4%	--	--	--	
Net Income	181.0	104.0	99.0	(319.0)	(208.0)	166.0	139.0	82.0	41.7	41.7	41.7	
Margin %	1.8%	0.9%	1.0%	(3.6%)	(2.5%)	2.0%	1.8%	4.4%	0.5%	2.4%	2.4%	
Diluted EPS Excl. Extra Items	2.7	17.7	22.9	(1.2)	3.4	3.6	3.5	2.1	1.2	1.2	1.2	
Growth Over Prior Year	(78.2%)	555.6%	29.4%	--	--	5.6%	(3.0%)	(50.9%)	16.2%	16.2%	16.2%	

Current Capitalization (Millions)	
Currency	USD
Share Price (USD)	38.52
Shares Out.	35.89
Market Capitalization (USD)	1,382.67
- Cash & Short Term Investments	282.00
+ Total Debt	916.00
+ Pref. Equity	0.00
+ Total Minority Interest	0.00
= Total Enterprise Value (USD)	2,016.67
Book Value of Common Equity	1,069.00
+ Pref. Equity	0.00
+ Total Minority Interest	0.00
+ Total Debt	916.00
= Total Capital	1,985.00



Valuation Multiples based on Current Capitalization				
For the Fiscal Period Ending	Actual	LTM	Estimates	
	30/03/2024	30/03/2024	30/03/2024	30/03/2024
TEV/Total Revenue	0.4x	0.3x	--	--
TEV/EBITDA	4.6x	10.7x	--	--
TEV/EBIT	10.8x	20.6x	--	--
P/Diluted EPS Before Extra	16.1x	25.6x	--	--
P/BV	1.9x	1.8x	1.4x	1.4x
Price/Tang BV	3.2x	3.1x	--	--

Valuation Multiples for Chart				
For the Fiscal Period Ending	TTM	FY1	NTM	FY2
PE Ratio	8.7x	5.6x	5.6x	5.6x
TEV / EBITDA	10.7x	0.0x	0.0x	0.0x
Price / CF	6.8x	3.7x	3.7x	3.7x
Price / Book	1.3x	1.4x	1.4x	1.4x
Dividend Yield	0.0x	0.0x	0.0x	0.0x



Ticker:	ODP US EQUITY	ODP US EQUITY	Ascend	Currency	Reporting	Change	USD
Period Type	Annuals	Consolidated	Yes	Accounting	Mixed		

ODP Corp/The

Sector: Productos de consumo no básico Industry: Ventas especializadas Sub-Industry: Otras ventas minoristas espec

Y	-10FY	-9FY	-8FY	-7FY	-6FY	-5FY	-4FY	-3FY	-2FY	-1FY	-0FY
Income Statement											
Income Sheet as of:	28/12/2013	27/12/2014	26/12/2015	31/12/2016	30/12/2017	29/12/2018	28/12/2019	26/12/2020	25/12/2021	31/12/2022	30/12/2023
Currency	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD
Revenue	11,242.00	12,710.00	11,727.00	11,021.00	10,240.00	11,015.00	9,667.00	8,872.00	8,465.00	8,491.00	7,831.00
Other Revenue	-	-	-	-	-	-	-	-	-	-	-
Total Revenue	11,242.00	12,710.00	11,727.00	11,021.00	10,240.00	11,015.00	9,667.00	8,872.00	8,465.00	8,491.00	7,831.00
Cost Of Goods Sold	8,616.00	9,734.00	8,864.00	8,313.00	7,779.00	8,464.00	7,412.00	6,921.00	6,602.00	6,643.00	6,065.00
Gross Profit	2,626.00	2,976.00	2,863.00	2,708.00	2,461.00	2,551.00	2,255.00	1,951.00	1,863.00	1,848.00	1,766.00
Selling General & Admin Exp.	2,831.00	3,204.00	2,680.00	2,177.00	2,134.00	2,297.00	2,031.00	1,945.00	1,629.00	1,605.00	1,565.00
R & D Exp.	-	-	-	-	-	-	-	-	-	-	-
Depreciation & Amort.	-	-	-	-	-	-	-	-	-	-	-
Other Operating Expense/(Income)	-	-	-	-	-	-	-	-	-	-	-
Operating Expense, Total	2,831.00	3,204.00	2,680.00	2,177.00	2,134.00	2,297.00	2,031.00	1,945.00	1,629.00	1,605.00	1,565.00
Operating Income	(205.00)	(228.00)	183.00	531.00	327.00	254.00	224.00	6.00	234.00	243.00	201.00
Interest Expense	69.00	87.00	91.00	80.00	62.00	121.00	89.00	42.00	28.00	16.00	20.00
Interest Income	5.00	22.00	22.00	22.00	22.00	25.00	22.00	4.00	1.00	5.00	10.00
Net Interest Exp.	64.00	65.00	69.00	58.00	40.00	96.00	67.00	38.00	27.00	11.00	10.00
Currency Exchange Gains (Loss)	-	-	-	-	-	-	-	-	-	-	-
Other Non-Operating Inc. (Exp.)	(81.00)	(65.00)	22.00	8.00	(12.00)	(2.00)	(53.00)	(180.00)	(39.00)	(20.00)	(90.00)
EBT Excl. Unusual Items	(188.00)	(228.00)	92.00	465.00	299.00	160.00	210.00	148.00	246.00	252.00	281.00
Impairment of Goodwill	-	-	-	-	-	-	-	-	-	-	-
Gain (Loss) On Sale Of Assets	(385.00)	7.00	(36.00)	(9.00)	(4.00)	(5.00)	(24.00)	4.00	(5.00)	(4.00)	(4.00)
Asset Writedown	70.00	56.00	13.00	15.00	4.00	7.00	56.00	182.00	20.00	14.00	85.00
Legal Settlements	-	-	-	-	-	-	-	-	-	-	-
Other Unusual Items	630.00	(126.00)	46.00	(12.00)	-	(4.00)	(64.00)	(372.00)	(30.00)	(20.00)	(162.00)
EBT Incl. Unusual Items	127.00	(291.00)	115.00	459.00	299.00	158.00	178.00	(38.00)	231.00	242.00	200.00
Income Tax Expense	147.00	2.00	23.00	(220.00)	153.00	59.00	51.00	25.00	44.00	64.00	61.00
Earnings from Cont. Ops.	(20.00)	(293.00)	92.00	679.00	146.00	99.00	127.00	(63.00)	187.00	178.00	139.00
Extraord. Item & Account. Change	-	59.00	84.00	150.00	(35.00)	(5.00)	28.00	256.00	395.00	12.00	-
Minority Int. in Earnings	-	2.00	-	-	-	-	-	-	-	-	-
Net Income	(20.00)	(354.00)	8.00	529.00	181.00	104.00	99.00	(319.00)	(208.00)	166.00	139.00
Pref. Dividends	73.00	-	-	-	-	-	-	-	-	-	-
Other Adj	-	-	-	-	-	-	-	-	-	-	-
NI to Common Incl Extra Items	(93.00)	(354.00)	8.00	529.00	181.00	104.00	99.00	(319.00)	(208.00)	166.00	139.00
Abnormal Losses (Gains)	697.00	478.00	117.00	(59.00)	99.00	119.00	118.00	300.00	66.00	49.00	85.00
Tax Effect on Abnormal Items	(228.55)	(167.30)	(76.70)	(372.85)	(7.90)	(19.83)	(24.78)	(75.04)	(17.81)	(10.29)	(17.85)
NI to Common Excl. Extra Items	375.45	(43.30)	48.30	97.15	272.10	203.17	192.22	(94.04)	(159.81)	204.71	206.15
Per Share Items											
Basic EPS	(2.90)	(6.60)	0.10	9.80	3.50	18.90	18.20	(6.05)	(3.93)	3.48	3.61
Basic EPS Excl. Extra Items	(2.90)	(5.50)	1.70	12.60	2.80	18.00	23.20	(1.20)	3.54	3.73	3.61
Weighted Avg. Basic Shares Out.	31.80	53.50	54.70	53.90	52.20	5.50	5.44	52.73	52.93	47.70	38.50
Diluted EPS	(2.90)	(6.60)	0.10	9.60	3.40	18.50	17.90	(6.05)	(3.93)	3.37	3.50
Diluted EPS Excl. Extra Items	(2.90)	(5.50)	1.60	12.40	2.70	17.70	22.90	(1.20)	3.42	3.61	3.50
Weighted Avg. Diluted Shares Out.	31.80	53.50	55.50	53.90	52.20	5.62	5.53	52.73	54.88	49.26	39.71
Normalized Basic EPS	(1.10)	2.20	4.10	4.60	4.50	3.50	4.10	3.50	4.28	4.40	5.60
Normalized Diluted EPS	11.81	0.29	2.33	4.39	4.45	35.34	39.75	3.07	4.30	4.40	5.19
Dividends per Share											
Payout Ratio %	-	-	-	3.97	35.75	5.56	42.83	-	-	-	-
Supplemental Items											
EBITA	(145.00)	(134.00)	264.00	588.00	375.00	332.00	696.00	462.00	640.00	584.00	530.00
EBIT	(205.00)	(228.00)	183.00	531.00	327.00	254.00	224.00	6.00	234.00	243.00	201.00
As Reported Total Revenue*	11,242.00	12,710.00	11,727.00	11,021.00	10,240.00	11,015.00	9,667.00	8,872.00	8,465.00	8,491.00	7,831.00
Effective Tax Rate %	115.75	-	20.00	-	51.17	37.34	28.65	-	19.05	26.45	30.50
Normalized Net Income	375.45	15.70	132.30	247.15	237.10	198.17	220.22	161.96	235.19	216.71	206.15
Interest Capitalized	-	-	-	-	-	-	-	-	-	-	-
Supplemental Operating Expense Items											
Net Rental Exp.	-	-	-	-	-	-	-	-	-	-	-
Stock-Based Comp., Unallocated	38.00	35.00	41.00	40.00	28.00	27.00	33.00	41.00	38.00	40.00	36.00
Stock-Based Comp., Total	38.00	35.00	41.00	40.00	28.00	27.00	33.00	41.00	38.00	40.00	36.00

Ticker:	ODP US EQUITY
Period Type	Annuals ▾

ODP US EQUITY	Ascend ▾
Consolidated	Yes ▾

Currency	☒ Reporting	☒ Change	USD
Accounting	Mixed ▾		

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Sector: Productos de consumo no básico Industry: Ventas especializadas Sub-Industry: Otras ventas minoristas especi

Y	-10FY	-9FY	-8FY	-7FY	-6FY	-5FY	-4FY	-3FY	-2FY	-1FY	-0FY
Balance Sheet											
Balance Sheet as of:	28/12/2013	27/12/2014	26/12/2015	31/12/2016	30/12/2017	29/12/2018	28/12/2019	26/12/2020	25/12/2021	31/12/2022	30/12/2023
Currency	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD
ASSETS											
Cash And Equivalents	955.00	1,071.00	860.00	763.00	622.00	658.00	698.00	729.00	514.00	403.00	392.00
Short Term Investments	-	-	-	-	-	-	-	-	-	-	-
Total Cash & ST Investments	955.00	1,071.00	860.00	763.00	622.00	658.00	698.00	729.00	514.00	403.00	392.00
Accounts & Notes Receivable	1,333.00	1,264.00	746.00	687.00	931.00	885.00	1,642.00	442.00	495.00	536.00	487.00
Total Receivables	1,333.00	1,264.00	746.00	687.00	931.00	885.00	1,642.00	442.00	495.00	536.00	487.00
Inventories	1,812.00	1,638.00	1,406.00	1,279.00	1,093.00	1,065.00	1,032.00	916.00	859.00	828.00	765.00
Prepaid Exp.	296.00	158.00	92.00	102.00	86.00	75.00	75.00	49.00	52.00	36.00	28.00
Restricted Cash	-	-	-	-	-	-	-	-	-	-	-
Other Current Assets	-	-	956.00	142.00	139.00	-	-	219.00	469.00	107.00	6.00
Total Current Assets	4,396.00	4,131.00	4,060.00	2,973.00	2,871.00	2,683.00	3,447.00	2,355.00	2,389.00	1,910.00	1,678.00
Net Property, Plant & Equipment	1,309.00	963.00	665.00	601.00	725.00	763.00	2,092.00	1,649.00	1,413.00	1,226.00	1,342.00
Long-term Investments	-	926.00	905.00	885.00	863.00	842.00	-	-	-	-	-
Deferred Charges, LT	35.00	36.00	11.00	466.00	305.00	284.00	183.00	218.00	219.00	182.00	140.00
Other Long-Term Assets	1,737.00	701.00	801.00	615.00	1,559.00	1,594.00	1,589.00	1,392.00	844.00	831.00	726.00
Total Assets	7,477.00	6,757.00	6,442.00	5,540.00	6,323.00	6,166.00	7,311.00	5,614.00	4,865.00	4,149.00	3,886.00
LIABILITIES											
Accrued Exp.	-	-	-	-	-	-	-	-	-	-	-
Short-term Borrowings	29.00	32.00	51.00	29.00	96.00	95.00	479.00	24.00	20.00	297.00	282.00
Accounts Payable	1,426.00	1,340.00	987.00	893.00	892.00	1,110.00	1,026.00	857.00	950.00	821.00	755.00
Curr. Income Taxes Payable	4.00	4.00	9.00	3.00	5.00	2.00	8.00	10.00	11.00	17.00	6.00
Other Current Liabilities	1,463.00	1,514.00	1,696.00	1,106.00	1,053.00	978.00	1,581.00	1,202.00	1,284.00	724.00	650.00
Total Current Liabilities	2,922.00	2,890.00	2,743.00	2,031.00	2,046.00	2,185.00	3,094.00	2,093.00	2,265.00	1,859.00	1,693.00
Long-Term Debt	1,555.00	1,509.00	1,447.00	1,156.00	1,712.00	1,444.00	1,783.00	1,289.00	981.00	865.00	954.00
Unearned Revenue, Non-Current	-	-	-	-	-	-	-	-	-	-	-
Other Non-Current Liabilities	882.00	737.00	649.00	501.00	427.00	411.00	261.00	352.00	181.00	138.00	138.00
Total Liabilities	5,359.00	5,136.00	4,839.00	3,688.00	4,185.00	4,040.00	5,138.00	3,734.00	3,427.00	2,862.00	2,785.00
Pref. Stock, Non-Redeem.	-	-	-	-	-	-	-	-	-	-	-
Total Pref. Equity	-	-	-	-	-	-	-	-	-	-	-
Minority Interest	55.00	-	-	-	18.00	-	-	-	-	-	-
Additional Paid In Capital	2,485.00	2,562.00	2,613.00	2,624.00	2,717.00	2,683.00	2,653.00	2,676.00	2,693.00	2,743.00	2,753.00
Retained Earnings	(636.00)	(990.00)	(982.00)	(453.00)	(273.00)	(173.00)	(89.00)	(409.00)	(617.00)	(451.00)	(312.00)
Treasury Stock	(58.00)	(58.00)	(58.00)	(190.00)	(246.00)	(285.00)	(325.00)	(355.00)	(632.00)	(928.00)	(1,226.00)
Comprehensive Inc. and Other	272.00	107.00	30.00	(129.00)	(78.00)	(99.00)	(66.00)	(32.00)	(6.00)	(77.00)	(114.00)
Total Common Equity	2,118.00	1,621.00	1,603.00	1,852.00	2,138.00	2,126.00	2,173.00	1,880.00	1,438.00	1,287.00	1,101.00
Total Equity	2,118.00	1,621.00	1,603.00	1,852.00	2,138.00	2,126.00	2,173.00	1,880.00	1,438.00	1,287.00	1,101.00
Total Liabilities And Equity	7,477.00	6,757.00	6,442.00	5,540.00	6,323.00	6,166.00	7,311.00	5,614.00	4,865.00	4,149.00	3,886.00
Supplemental Items											
Total Shares Out. on Filing Date	53.07	54.52	54.89	51.51	55.40	54.38	5.35	52.69	48.46	42.21	36.96
Total Shares Out. on Balance Sheet Date	53.07	54.52	54.89	51.51	55.40	54.38	5.35	52.69	48.46	42.21	36.96
Book Value/Share	38.87	29.73	29.20	35.95	38.27	39.09	406.03	35.68	29.68	30.49	29.79
Tangible Book Value	1,552.00	1,158.00	1,187.00	1,456.00	821.00	790.00	841.00	1,429.00	920.00	777.00	653.00
Tangible Book Value/Share	29.24	21.24	21.62	28.27	14.82	14.53	157.14	27.12	18.99	18.41	17.67
Total Debt	1,584.00	1,541.00	1,498.00	1,185.00	1,808.00	1,539.00	2,262.00	1,313.00	1,001.00	1,162.00	1,236.00
Net Debt	629.00	470.00	638.00	422.00	1,186.00	881.00	1,564.00	584.00	487.00	759.00	844.00
Total Minority Interest	55.00	-	-	-	18.00	-	-	-	-	-	-
Inventory Method	/eighted average	/eighted average	/eighted average	/eighted average	/eighted average	/eighted average	/eighted average	/eighted average	/eighted average	/eighted average	/eighted average
Raw Materials in Inventory	-	-	-	-	-	-	-	-	-	-	-
Work in Progress Inventory	-	-	-	-	-	-	-	-	-	-	-
Finished Goods Inventory	-	-	-	-	-	-	-	-	-	-	-
Other Inventory Accounts	-	-	-	-	-	-	-	-	-	-	-
Accum. Allowance for Doubtful Accts	-	-	-	-	-	-	-	-	-	-	-
Full Time Employees	64,000.00	56,000.00	49,000.00	38,000.00	45,000.00	44,000.00	40,000.00	37,000.00	26,000.00	25,000.00	20,000.00

ODP Corp/The

Sector: Productos de consumo no básico Industry: Ventas especializadas Sub-Industry: Otras ventas minoristas especi

[illegible]

Ticker: ODP US EQUITY

Sort Ascend

Period Type Annuals

Consolidated Yes

Accounting Mixed

ODP Corp/The

Sector: Productos de consumo no básico

Industry: Ventas especializadas

Sub-Industry: Otras ventas minoristas especi

Y		-10FY	-9FY	-8FY	-7FY	-6FY	-5FY	-4FY	-3FY	-2FY	-1FY	-0FY
Multiples												
		28/12/2013	27/12/2014	26/12/2015	31/12/2016	30/12/2017	29/12/2018	28/12/2019	26/12/2020	25/12/2021	31/12/2022	30/12/2023
TEV / LTM Total Revenue	Close	0.3x	0.4x	0.3x	0.2x	0.3x	0.2x	0.2x	0.2x	0.3x	0.3x	0.4x
	Average	0.2x	0.3x	0.4x	0.3x	0.3x	0.3x	0.2x	0.3x	0.3x	0.3x	0.3x
	High	0.3x	0.5x	0.5x	0.4x	0.3x	0.3x	0.3x	0.3x	0.4x	0.3x	0.4x
	Low	0.1x	0.2x	0.3x	0.2x	0.2x	0.2x	0.1x	0.2x	0.2x	0.2x	0.3x
TEV / LTM EBITDA	Close	859.6x	107.9x	8.5x	3.9x	6.5x	5.0x	2.1x	3.7x	3.3x	3.8x	4.6x
	Average	14.1x	875.7x	100.4x	7.1x	3.9x	5.6x	4.8x	3.4x	5.1x	3.4x	3.7x
	High	858.7x	1349.2x	117.0x	11.2x	6.2x	6.4x	6.6x	3.9x	5.9x	4.0x	4.6x
	Low	7.7x	106.8x	8.5x	3.9x	2.8x	4.8x	3.5x	2.9x	3.4x	2.6x	3.3x
TEV / LTM EBIT	Close	--	--	20.3x	5.2x	9.7x	8.9x	7.6x	24.2x	8.4x	9.1x	10.8x
	Average	--	--	20.3x	16.8x	5.2x	8.4x	8.5x	12.4x	33.1x	8.7x	8.9x
	High	--	--	20.3x	26.7x	9.3x	9.4x	13.4x	24.2x	38.4x	9.9x	10.9x
	Low	--	--	20.3x	5.3x	3.7x	7.1x	6.1x	10.3x	8.8x	6.8x	7.8x
Price / LTM EPS	Close	4.4x	301.2x	24.1x	10.3x	8.0x	0.7x	0.7x	9.3x	9.1x	10.4x	10.8x
	Average	107.9x	5.7x	277.8x	19.3x	10.3x	6.3x	0.7x	0.6x	14.0x	9.4x	10.7x
	High	141.1x	301.2x	329.9x	33.2x	14.1x	8.1x	1.1x	9.3x	16.3x	11.2x	13.3x
	Low	4.4x	3.3x	24.1x	10.3x	6.9x	0.7x	0.4x	0.4x	9.1x	6.7x	9.1x
Price / Book Value	Close	1.3x	3.0x	1.9x	1.3x	0.9x	0.6x	0.1x	0.8x	1.3x	1.5x	1.9x
	Average	2.0x	1.4x	2.7x	1.5x	1.3x	0.7x	0.6x	0.1x	1.2x	1.4x	1.5x
	High	2.6x	3.0x	3.3x	2.6x	1.7x	0.9x	1.0x	0.8x	1.4x	1.6x	1.9x
	Low	1.3x	1.0x	1.8x	1.0x	0.8x	0.5x	0.1x	0.0x	0.8x	1.0x	1.3x
Price / Tangible Book Value	Close	1.8x	4.2x	2.6x	1.6x	2.4x	1.7x	0.2x	1.1x	2.1x	2.5x	3.2x
	Average	2.3x	1.8x	3.8x	2.1x	1.6x	1.9x	1.6x	0.1x	1.6x	2.1x	2.5x
	High	2.9x	4.2x	4.6x	3.6x	2.4x	2.4x	2.6x	1.1x	2.1x	2.5x	3.2x
	Low	1.7x	1.3x	2.5x	1.4x	1.1x	1.3x	0.2x	0.1x	1.0x	1.5x	2.2x
Price / Cash Flow	Close	--	30.5x	24.3x	6.6x	4.0x	0.2x	0.4x	3.1x	6.0x	9.2x	6.5x
	Average	6.9x	30.5x	28.2x	19.5x	6.6x	3.2x	0.2x	0.3x	4.7x	6.2x	9.4x
	High	9.0x	30.5x	33.4x	33.6x	9.0x	4.1x	0.4x	3.1x	6.0x	9.2x	11.8x
	Low	5.1x	30.5x	18.4x	6.6x	4.0x	0.2x	0.1x	0.2x	3.1x	4.4x	6.5x
TEV / LTM FCF	Close	--	80.2x	--	9.4x	5.8x	0.3x	0.6x	3.5x	7.6x	15.7x	9.6x
	Average	21.0x	80.2x	74.2x	9.4x	9.4x	4.6x	0.3x	0.6x	5.3x	7.9x	16.2x
	High	27.4x	80.2x	87.8x	9.4x	12.8x	5.9x	0.6x	3.5x	7.6x	15.7x	20.2x
	Low	15.6x	80.2x	48.3x	9.4x	5.8x	0.3x	0.2x	0.3x	3.5x	5.6x	9.6x
Dividend Yield	Close	0.0	0.0	0.0	1.1	2.8	4.0	38.0	0.9	0.0	0.0	0.0
	Average	0.0	0.0	0.0	0.0	1.1	3.6	4.7	45.0	0.6	0.0	0.0
	High	0.0	0.0	0.0	1.1	2.8	5.0	38.0	71.4	0.9	0.0	0.0
	Low	0.0	0.0	0.0	0.0	0.8	2.8	2.7	0.9	0.0	0.0	0.0

Ticker:	ODP US EQUITY
Period Type:	Quarters

ODP US EQUITY	Ascend
Consolidated	Yes

	Accounting	Mixed
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ODP Corp/The

Sector: Productos de consumo no básico Industry: Ventas especializadas Sub-Industry: Otras ventas minoristas espesd

	-10Q	-9Q	-8Q	-7Q	-6Q	-5Q	-4Q	-3Q	-2Q	-1Q	0Q
For the Fiscal Period Ending	25/09/2021	25/12/2021	26/03/2022	25/06/2022	24/09/2022	31/12/2022	01/04/2023	01/07/2023	30/09/2023	30/12/2023	30/03/2024
Profitability											
Return on Assets	1.5%	-4.0%	-4.1%	-1.8%	-2.6%	3.7%	4.3%	4.5%	4.6%	3.5%	2.1%
Return on Capital	3.5%	-6.6%	-6.6%	-2.7%	-4.1%	7.2%	8.7%	9.0%	9.3%	6.4%	4.7%
Return on Equity	4.6%	-12.5%	-11.9%	-5.4%	-7.4%	12.2%	13.9%	14.2%	14.5%	11.6%	7.4%
Margin Analysis											
Gross Margin	23.1%	21.2%	22.2%	21.2%	22.4%	21.2%	22.8%	23.8%	23.6%	21.9%	21.9%
SG&A Margin	--	--	--	--	--	--	--	--	--	--	--
EBITDA Margin	4.6%	4.3%	4.3%	4.3%	4.2%	4.4%	4.6%	4.8%	5.0%	4.0%	3.1%
EBIT Margin	2.8%	2.8%	2.8%	2.8%	2.8%	2.9%	3.1%	3.4%	3.5%	2.6%	1.6%
Earnings from Cont. Ops Margin	4.8%	1.5%	3.5%	1.4%	3.9%	2.6%	4.5%	2.4%	4.5%	-1.7%	1.0%
Net Income Margin	4.6%	-13.4%	2.5%	1.3%	3.1%	2.0%	3.1%	2.8%	3.5%	-2.0%	0.8%
Normalized Net Income Margin	4.4%	-1.7%	2.8%	1.1%	3.4%	1.8%	3.5%	2.0%	3.6%	1.1%	2.1%
Free Cash Flow Margin	7.0%	-35.1%	0.4%	-6.7%	6.4%	6.0%	6.2%	-1.7%	4.3%	2.3%	0.2%
Asset Turnover											
Total Asset Turnover	1.5x	1.6x	1.7x	1.7x	1.7x	1.9x	2.0x	2.0x	1.9x	1.9x	2.0x
Fixed Asset Turnover	5.7x	5.7x	5.6x	5.7x	6.3x	6.4x	6.4x	6.4x	6.4x	6.1x	5.9x
Account's Receivable Turnover	18.9x	18.1x	15.5x	15.5x	15.7x	16.5x	15.4x	15.5x	18.6x	15.5x	15.5x
Inventory Turnover	7.7x	7.4x	7.4x	6.8x	7.6x	7.9x	7.9x	7.7x	7.6x	7.6x	7.7x
Quick Term Liability											
Current Ratio	1.5x	1.5x	1.6x	1.5x	1.5x	1.6x	1.6x	1.6x	1.6x	1.6x	0.9x
Quick Ratio	0.6x	0.6x	0.6x	0.6x	0.5x	0.5x	0.5x	0.5x	0.5x	0.5x	0.5x
Cash from Ops. To Fin. Liab.	0.5x	0.7x	0.5x	0.7x	0.7x	0.7x	0.7x	0.7x	0.7x	0.7x	0.7x
Acc. From Sales/Chg.	34.1x	27.1x	27.1x	27.1x	27.1x	27.1x	27.1x	27.1x	27.1x	27.1x	27.1x
Acc. From Investments/Chg.	60.6x	48.9x	49.4x	53.7x	47.8x	47.1x	46.8x	51.8x	49.1x	47.8x	47.1x
Acc. From Financial/Chg.	53.5x	40.7x	43.7x	53.7x	48.7x	48.7x	48.7x	53.4x	49.9x	47.8x	51.7x
Acc. Cash Conversion/Fuelx	71.5x	58.8x	57.7x	57.8x	51.9x	59.9x	57.4x	73.8x	55.9x	73.8x	58.1x
Lower Term Solvency											
Total Debt/Equity	40.5%	48.0%	41.7%	40.7%	45.9%	40.7%	40.7%	36.6%	41.4%	117.5%	40.7%
Total Debt/Total Asset	57.7%	47.0%	58.7%	47.0%	57.1%	44.1%	44.1%	37.1%	45.1%	52.0%	46.1%
LT Debt/Equity	48.6%	48.7%	49.0%	58.6%	58.0%	47.7%	79.7%	76.8%	80.6%	86.6%	82.8%
LT Debt/Total Asset	57.0%	49.7%	67.1%	57.5%	56.4%	43.9%	47.9%	46.4%	49.4%	49.9%	45.4%
Total Liabilities/Total Assets	74.4%	71.4%	73.6%	71.6%	73.7%	74.7%	75.9%	75.7%	76.6%	78.1%	77.9%
EBIT / Interest Exp.	1.86x	4.47x	15.20x	7.05x	44.00x	11.00x	19.00x	9.20x	18.20x	6.20x	4.50x
EBITDA / Interest Exp.	17.85x	41.57x	17.65x	11.65x	116.00x	17.20x	25.00x	12.20x	24.00x	11.70x	11.70x
EBITDA / EBIT / Interest Exp.	15.29x	5.96x	17.89x	16.00x	101.00x	11.00x	19.40x	10.20x	19.00x	6.60x	3.00x
Total Debt/EBITDA	2.49x	2.47x	2.49x	2.47x	2.47x	2.47x	2.47x	2.47x	2.47x	2.47x	2.47x
Net Debt/EBITDA	0.96x	1.15x	0.97x	1.16x	1.10x	1.09x	1.09x	1.10x	1.12x	0.67x	0.66x
Altman's Z Score	1.37	1.31	1.68	1.48	1.68	1.93	1.64	1.6	1.69	1.16	1.11
Growth Over Prior Year											
Total Revenue	(7.7M)	(7.1M)	(7.7M)	(7.7M)	(8.0M)	5.1%	(3.7M)	(6.7M)	(7.5M)	(14.7M)	(11.7M)
Gross Profit	(7.9M)	(7.7M)	(7.7M)	(8.0M)	(7.9M)	(8.0M)	(7.5M)	(11.7M)	(14.8M)	(11.7M)	(11.7M)
EBITDA	(0.8M)	(75.6M)	7.4M	(6.1M)	(7.7M)	39.4%	13.6%	71.0%	3.4%	(104.7M)	(47.4M)
EBT	--	--	--	--	--	--	--	--	--	--	--
EBT	7.0%	55.0%	10.1%	(6.7M)	(19.7M)	77.4%	75.0%	64.5%	8.5%	(156.4M)	(81.1M)
Earnings from Cont. Ops	7.3%	112.7M)	7.3%	(10.7M)	(30.7M)	77.4%	75.0%	64.5%	8.5%	(156.4M)	(81.1M)
Net Income	77.7%	(1.637.7M)	5.4M	(134.7M)	(173.7M)	106.7M)	30.9%	39.4%	4.5%	(117.6M)	(78.7M)
Normalized Net Income	77.0%	(1.7M)	5.0M	(134.7M)	(173.7M)	106.7M)	30.9%	39.4%	4.5%	(117.6M)	(78.7M)
Diluted EPS before Extra	111.1%	(75.8M)	(7.7M)	11.4%	7.1%	75.0%	66.9%	179.1%	51.6%	(730.7M)	(796.6M)
Accounts Receivable	(77.1M)	(7.7M)	(16.7M)	(16.9M)	77.6M)	8.3%	(8.4M)	(8.8M)	(8.8M)	(9.1M)	(11.1M)
Inventory	(16.6M)	(6.7M)	(6.6M)	1.4%	5.4M)	(3.4M)	(9.4M)	(14.6M)	(14.1M)	(7.6M)	(6.6M)
Net PP&E	(705.5M)	(14.7M)	(16.9M)	(11.6M)	(11.6M)	(11.7M)	(9.7M)	(9.7M)	4.7M)	6.1M)	8.9M)
Total Assets	(6.9M)	(11.7M)	(19.1M)	(16.8M)	(16.8M)	(17.4M)	(10.9M)	(11.5M)	(9.9M)	(6.7M)	(7.6M)
Table Book Value	43.5%	(50.0M)	17.5M)	19.7M)	(17.0M)	(1.1M)	(17.7M)	(17.7M)	(18.9M)	(4.0M)	4.4%
Common Equity	3.7%	(71.9M)	(72.6M)	(71.9M)	(71.9M)	(71.9M)	(71.9M)	(71.9M)	(71.9M)	(71.9M)	(71.9M)
Cash from Ops.	(68.7M)	17.100.0M)	(65.1M)	(65.4M)	(4.7M)	(177.9M)	473.5M)	(49.0M)	(51.7M)	(55.7M)	(75.9M)
Capital Expenditures	(100.0M)	56.4M)	75.7M)	75.7M)	56.4M)	56.4M)	56.4M)	56.4M)	56.4M)	56.4M)	56.4M)
Unlevered Free Cash Flow	(49.0M)	1.011.0M)	(87.8M)	(401.7M)	(9.8M)	(117.7M)	1.644.4M)	(75.5M)	(17.7M)	(67.7M)	(87.7M)
Unlevered Free Cash Flow	(49.0M)	1.011.0M)	(87.8M)	(401.7M)	(9.8M)	(117.7M)	1.644.4M)	(75.5M)	(17.7M)	(67.7M)	(87.7M)
Dividend per Share	--	--	--	--	--	--	--	--	--	--	--
F&B Over Three Years											
Total Revenue	(11.5M)	15.4%	(10.6M)	(7.9M)	(8.8M)	(7.5M)	(1.5M)	(4.0M)	(4.0M)	(6.0M)	(7.7M)
Gross Profit	(11.5M)	15.4%	(10.6M)	(8.8M)	(8.8M)	(7.5M)	(1.5M)	(4.0M)	(4.0M)	(6.0M)	(7.7M)
EBITDA	(11.4M)	(54.1M)	(7.7M)	--	(1.1M)	(7.7M)	8.1%	6.6%	(7.0M)	--	(14.6M)
EBT	1.9M)	(44.7M)	(7.5M)	--	(9.9M)	45.8%	17.5%	73.8%	(6.5M)	--	(51.1M)
Earnings from Cont. Ops	10.1%	(17.0M)	10.4%	--	7.8M)	40.4M)	37.1M)	40.4M)	(7.1M)	--	(47.8M)
Net Income	39.7%	--	10.4%	--	8.4%	(7.8M)	16.4%	--	(16.7M)	(69.1M)	(47.8M)
Normalized Net Income	7.4%	--	11.1M)	39.1M)	--	19.4M)	7.7%	6.1%	(17.7M)	(124.6M)	(17.7M)
Diluted EPS before Extra	10.5%	(81.0M)	(64.7M)	--	46.4M)	19.4M)	33.6%	47.7%	16.0%	--	(109.4M)
Accounts Receivable	(47.4M)	(45.1M)	(18.0M)	(8.7M)	(5.4M)	10.1M)	(11.0M)	4.0%	(0.8M)	(9.7M)	(9.7M)
Inventory	(9.4M)	(8.8M)	(1.5M)	(1.4M)	(5.7M)	(4.4M)	(7.7M)	(6.5M)	(5.6M)	(6.0M)	(6.0M)
Net PP&E	(16.7M)	(1.5M)	(1.4M)	(1.4M)	(1.4M)	(1.4M)	(1.4M)	(1.4M)	(1.4M)	(1.4M)	(1.4M)
Total Assets	(14.6M)	(18.4M)	(16.7M)	(17.7M)	(17.7M)	(14.0M)	(15.0M)	(14.7M)	(14.8M)	(10.0M)	(9.7M)
Table Book Value	32.3%	(62.7M)	15.3%	16.4M)	15.4M)	(17.6M)	(1.4M)	(4.0M)	(19.4M)	(9.4M)	(7.1M)
Common Equity	(6.4M)	(18.7M)	(16.4M)	(6.1M)	(8.4M)	(17.7M)	(15.0M)	(17.7M)	(17.7M)	(17.7M)	(17.7M)
Cash from Ops.	(10.7M)	--	(40.1M)	77.5M)	(77.4M)	--	35.1%	(14.7M)	(19.1M)	--	17.5M)
Capital Expenditures	(75.0M)	71.7%	(9.7M)	65.7M)	65.7M)	77.7%	50.0%	17.8M)	5.6M)	--	29.1M)
Unlevered Free Cash Flow	(7.0M)	--	(75.5M)	141.7M)	(17.7M)	--	37.5%	8.9M)	(14.6M)	--	(47.7M)
Unlevered Free Cash Flow	(7.0M)	--	(75.5M)	141.7M)	(17.7M)	--	37.5%	8.9M)	(14.6M)	--	(47.7M)
Dividend per Share	(100.0M)	(100.0M)	--	(100.0M)	--	--	47.5M)	8.9M)	(14.6M)	--	(47.7M)
F&B Over Three Years											
Total Revenue	(9.0M)	(8.6M)	(7.7M)	(7.7M)	(7.9M)	11.3%	(8.7M)	(4.0M)	(5.1M)	(4.7M)	(4.6M)
Gross Profit	(9.0M)	(8.6M)	(8.6M)	(8.7M)	(10.0M)	7.7%	(8.4M)	(4.7M)	(4.7M)	(4.7M)	(4.6M)
EBITDA	(6.7M)	(7.7M)	1.4%	(14.4M)	(14.4M)	(15.6M)	(1.7M)	(15.6M)	(1.5M)	(15.6M)	(14.4M)
EBT	--	--	--	--	--	--	--	--	--	--	--
EBT	10.1%	7.9M)	46.8M)	(77.1M)	(8.0M)	(19.9M)	5.9%	(14.6M)	(7.9M)	(77.1M)	(16.1M)
Earnings from Cont. Ops	10.1%	7.9M)	46.8M)	(77.1M)	(8.0M)	(19.9M)	5.9%	(14.6M)	(7.9M)	(77.1M)	(16.1M)
Net Income	6.4%	40.1M)	19.1M)	9.7%	(14.4M)	9.7%	17.5M)	17.5M)	17.5M)	17.5M)	17.5M)
Normalized Net Income	10.0%	100.1M)	40.1M)	(704.0M)	9.7%	(17.4M)	17.0%	(147.4M)	7.1%	(777.1M)	(14.1M)
Diluted EPS before Extra	5.0%	(19.7M)	7.7%	(19.7M)	7.7%	(19.7M)	17.5M)	17.5M)	17.5M)	17.5M)	17.5M)
Accounts Receivable	6.5%	(779.1M)	17.1M)	(194.1M)	7.7%	(61.1M)	(41.7M)	(47.7M)	41.6%	(719.1M)	(794.1M)
Inventory	(70.7M)	(17.6M)	(11.5M)	(10.7M)	(11.1M)	(14.9M)	(8.7M)	(6.4M)	9.3%	(17.1M)	(17.1M)
Net PP&E	(0.7M)	(6.7M)	(7.7M)	(4.0M)	(4.4M)	(15.7M)	(15.7M)	(15.7M)	(15.7M)	(15.7M)	(15.7M)
Total Assets	(6.1M)	(7.0M)	(15.4M)	(15.5M)	(15.4M)	(17.7M)	(14.7M)	(11.5M)	(11.5M)	(11.5M)	(11.5M)
Table Book Value	18.5%	9.3%	11.0%	15.1M)	15.3M)	(5.1M)	7.0%	5.7%	5.8%	(19.7M)	0.5%
Common Equity	(6.4M)	(10.4M)	(10.4M)	(11.4M)	(11.4M)	(11.4M)	(11.4M)	(11.4M)	(11.4M)	(11.4M)	(11.4M)
Cash from Ops.	(17.0M)	(117.0M)	(10.0M)	75.5M)	(8.4M)	1.5%	(5.8M)	(0.0M)	(29.7M)	(100.0M)	(75.0M)
Capital Expenditures	(77.0M)	(76.7M)	(76.7M)	65.7M)	65.7M)	77.7%	50.0%	17.8M)	5.6M)	--	29.1M)
Unlevered Free Cash Flow	(16.0M)	(86.6M)	(17.7M)	6.7%	(8.4M)	(7.9M)	17.5M)	17.5M)	17.5M)	17.5M)	17.5M)
Unlevered Free Cash Flow	(16.0M)	(86.6M)	(17.7M)	6.7%	(8.4M)	(7.9M)	17.5M)	17.5M)	17.5M)	17.5M)	17.5M)
Dividend per Share	(100.0M)	(100.0M)	(100.0M)	(100.0M)	(100.0M)	(100.0M)	(100.0M)	(100.0M)	(100.0M)	(100.0M)	(100.0M)
F&B Over Three Years											
Total Revenue	(5.1M)	(5.4M)	(4.6M)	(4.6M)	(4.7M)	(4.6M)	(5.7M)	(4.7M)	(7.0M)	(7.7M)	(7.0M)
Gross Profit	(7.0M)	(6.4M)	(6.4M)	(6.4M)	(6.4M)	(5.7M)	(6.7M)	(6.7M)	(7.1M)	(8.4M)	(8.4M)
EBITDA	(4.8M)	(7.5M)	(7.7M)	(5.0M)	(4.0M)	(2.8M)	0.2%	(5.0M)	(4.2M)		

Bloomberg

Company In Depth Fundamentals - Capital Structure Summary

Ticker:	ODP US EQUITY	Sort	Ascend	Currency	Reporting	Change	USD
Period Type	Quarters	Consolidated	Yes	Accounting	Mixed		

ODP Corp/The						
Sector: Productos de consumo no básico Industry: Ventas especializadas Sub-Industry: Otras ventas minoristas especi						
▼	-4FQ	-3FQ	-2FQ	-1FQ	-0FQ	
WACC						
For the Fiscal Period Ending	01/04/2023	01/07/2023	30/09/2023	30/12/2023	30/03/2024	
	%	%	%	%	%	
Equity						
Cost of Equity	8.5%	9.1%	9.2%	9.3%	8.6%	
Weight of Equity	65.4%	66.8%	64.9%	62.7%	67.7%	
+ Debt						
Cost of Debt	3.6%	3.9%	4.7%	3.8%	3.8%	
Weight of Debt	34.6%	33.2%	35.1%	37.3%	32.3%	
+ Preferred Equity						
Cost of Pref Equity					--	
Weight of Pref Equity	0.0%	0.0%	0.0%	0.0%	0.0%	
WACC	6.8%	7.4%	7.6%	7.2%	7.1%	
Capital Structure						
For the Fiscal Period Ending	01/04/2023	01/07/2023	30/09/2023	30/12/2023	30/03/2024	
Currency	USD	USD	USD	USD	USD	
	Millions	% of Total	Millions	% of Total	Millions	% of Total
Net Market Cap	12.0	0.5%	9.0	0.3%	9.0	0.3%
LT Borrowings	909.0	34.1%	880.0	32.9%	931.0	34.8%
Pref Equiv	0.0	0.0%	0.0	0.0%	0.0	0.0%
Total Capital	2,664.6	100.0%	2,676.9	100.0%	2,676.4	100.0%
					3,316.8	100.0%
					2,839.6	100.0%
Debt Summary Data						
For the Fiscal Period Ending	01/04/2023	01/07/2023	30/09/2023	30/12/2023	30/03/2024	
Currency	USD	USD	USD	USD	USD	
	Millions	% of Total	Millions	% of Total	Millions	% of Total
Total Financial Debt	803.0	87.2%	811.0	91.2%	771.0	82.0%
Total Revolving Credit	--	--	--	--	696.0	56.3%
Total Capital Leases	--	--	--	--	30.0	2.4%
General/Other Borrowings	--	--	169.0	18.0%	227.0	41.3%
Total Principal Due	921.0	100.0%	889.0	100.0%	940.0	100.0%
					1,236.0	100.0%
					916.0	100.0%
Total Debt Outstanding	921.0		889.0		940.0	
					1,236.0	
					916.0	
Additional Totals						
Total Cash & ST Investments	343.0	37.2%	335.0	37.7%	384.0	40.9%
Net Debt	578.0	62.8%	554.0	62.3%	556.0	59.1%
Total Short-Term Borrowings	12.0	1.3%	9.0	1.0%	9.0	1.0%
Curr. Port. of LT Debt/Cap. Leases	--	--	--	--	282.0	22.8%
Lone-Term Debt (incl. Cap. Leases)	909.0	98.7%	880.0	99.0%	931.0	99.0%
Total Secured Debt	--	--	--	--	954.0	77.2%
Fixed Rate Debt	--	--	--	--	--	--
Variable Rate Debt	--	--	--	--	--	--
Credit Ratios						
Net Debt/EBITDA	1.5x		1.4x		1.4x	
Total Debt/EBITDA	2.4x		2.2x		2.3x	
Operating Income/Total Debt	0.1x		0.1x		0.1x	
LTM FCY/Total Debt	0.3x		0.4x		0.3x	
LTM FCY/Total Debt	0.4x		0.5x		0.4x	
FRIT/Interest Expense	19.0x		9.2x		18.2x	
FRIT/Total Interest Expense	19.0x		9.2x		18.2x	
Debt to Financial Leverage	1.1x		1.1x		1.1x	
EBITDA/CAPEX/Interest Expense	19.6x		10.2x		19.0x	
EBITDA/Total Interest Expense	25.0x		15.0x		24.0x	
Debt Schedule						
Debt Schedule in Yr 1	--	--	--	--	10.0	5.7%
Debt Schedule in Yr 2	--	--	--	--	62.0	35.6%
Debt Schedule in Yr 3	--	--	--	--	38.0	21.8%
Debt Schedule in Yr 4	--	--	--	--	35.0	20.1%
Debt Schedule in Yr 5	--	--	--	--	2.0	1.1%
Debt Schedule - Years 2 - 3	--	--	--	--	100.0	57.5%
Debt Schedule - Years 4 - 5	--	--	--	--	37.0	21.3%
Debt Schedule - Years 2 - 5	--	--	--	--	137.0	78.7%
Debt Schedule Beyond Yr 5	--	--	--	--	30.0	17.2%
Debt Schedule - Total Debt	--	--	--	--	174.0	100.0%
Capital Lease Schedule						
Capital Leases - Year 1	--	--	--	--	10.0	30.3%
Capital Leases - Year 2	--	--	--	--	9.0	27.3%
Capital Leases - Year 3	--	--	--	--	7.0	21.2%
Capital Leases - Year 4	--	--	--	--	5.0	15.2%
Capital Leases - Year 5	--	--	--	--	2.0	6.1%
Capital Leases - Years 2 - 3	--	--	--	--	16.0	48.5%
Capital Leases - Years 4 - 5	--	--	--	--	7.0	21.2%
Capital Leases - Years 2 - 5	--	--	--	--	23.0	69.7%
Capital Leases Beyond Year 5	--	--	--	--	0.0	0.0%
Total Future Value of Capital Leases	--	--	--	--	33.0	100.0%
Present Value of ST Capital Leases	--	--	--	--	9.0	--
Present Value of LT Capital Leases	--	--	--	--	21.0	--
Operative Issues (Rental Expense) Schedule						
Rental Expense - Year 1	--	--	--	--	331.0	26.3%
Rental Expense - Year 2	--	--	--	--	270.0	21.4%
Rental Expense - Year 3	--	--	--	--	227.0	18.0%
Rental Expense - Year 4	--	--	--	--	173.0	13.7%
Rental Expense - Year 5	--	--	--	--	111.0	8.8%
Rental Expense - Years 2 - 3	--	--	--	--	607.0	39.5%
Rental Expense - Years 4 - 5	--	--	--	--	284.0	22.6%
Rental Expense - Years 2 - 5	--	--	--	--	781.0	62.0%
Rental Expense Beyond Year 5	--	--	--	--	147.0	11.7%
Total Sublease Income	--	--	--	--	--	--
Future Min Oper Lease Obligations	--	--	--	--	1,259.0	100.0%
Contractual Obligation Schedule						
Contractual Obligations - Year 1	--	--	--	--	--	--
Contractual Obligations - Years 2-3	--	--	--	--	--	--
Contractual Obligations - Years 4-5	--	--	--	--	--	--
Contractual Obligations - Years 2 - 5	--	--	--	--	--	--
Contractual Obligations - Beyond Year 5	--	--	--	--	--	--
Total Contractual Obligations	--	--	--	--	--	--
Purchase Obligations	--	--	--	--	--	--
Interest Rate Data						
W/Ave. Interest Rate - Lone-term Debt	--	--	--	--	--	--

ODP Corp/The

[illegible]**OPERATING PROFIT BEF TAX**

Ticker:	ODP US EQUITY	Sort	Ascend	Currency	Reporting	Change	USD
Period Type	Annua	Consolidated	Yes	Accounting	Mixed		

ODP Corp/The

Sector: Productos de consumo no básico Industry: Ventas especializadas Sub-Industry: Otras ventas minoristas especi

Y	-10FY	-9FY	-8FY	-7FY	-6FY	-5FY	-4FY	-3FY	-2FY	-1FY	-0FY
Pension											
For the Fiscal Period Ending	28/12/2013	27/12/2014	26/12/2015	31/12/2016	30/12/2017	29/12/2018	28/12/2019	26/12/2020	25/12/2021	31/12/2022	30/12/2023
Currency	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD
Pension Net Periodic Cost											
Service Cost	-	3.00	3.00	7.00	6.00	4.00	7.00	-	-	-	-
Interest Cost	16.00	62.00	55.00	52.00	45.00	41.00	36.00	33.00	24.00	25.00	40.00
Expected Return on Plan Assets	(21.00)	(76.00)	(70.00)	(65.00)	(59.00)	(51.00)	(42.00)	(37.00)	(33.00)	(32.00)	(40.00)
Pension Expense (Income)	(5.00)	(11.00)	(12.00)	(6.00)	(8.00)	(7.00)	1.00	(4.00)	(9.00)	(7.00)	(8.00)
Other Postretirement Cost											
Service Cost	-	-	-	-	-	-	-	-	-	-	-
Interest Cost	-	1.00	1.00	1.00	1.00	1.00	-	-	-	-	-
Expected Return on Plan Assets	-	-	-	-	-	-	-	-	-	-	-
Other Postretirement Benefits Expense (I	-	1.00	1.00	1.00	1.00	1.00	-	-	-	-	-
Pension Funded Status											
Fair Value of Plan Assets	1,218.00	1,296.00	1,162.00	1,148.00	1,221.00	1,062.00	1,145.00	1,254.00	1,194.00	814.00	774.00
Actual Return (Loss) on Plan Assets	36.00	154.00	(28.00)	146.00	130.00	(49.00)	188.00	171.00	26.00	(272.00)	24.00
Employer Contribution	--	--	--	--	2.00	2.00	2.00	9.00	2.00	2.00	2.00
Benefits Paid	(12.00)	(103.00)	(102.00)	(144.00)	(101.00)	(92.00)	(118.00)	(86.00)	(78.00)	(79.00)	(75.00)
Projected Benefit Obligation	1,346.00	1,457.00	1,304.00	1,230.00	1,228.00	1,083.00	1,142.00	1,193.00	1,087.00	768.00	759.00
Over(Under) Funded Pension	(128.00)	(161.00)	(142.00)	(82.00)	(7.00)	(21.00)	3.00	61.00	107.00	46.00	15.00
Accumulated Benefit Obligation	--	--	--	--	--	--	--	--	--	9.00	8.00
Pension Funding Ratio	90.49	88.95	89.11	93.33	99.43	98.06	100.26	105.11	109.84	105.99	101.98
Other Postretirement Funded Status											
Fair Value of Plan Assets	-	-	-	-	-	-	-	-	-	-	-
Actual Return (Loss) on Plan Assets	-	-	-	-	-	-	--	-	-	-	-
Employer Contribution	--	--	--	--	--	--	--	--	--	1.00	1.00
Benefits Paid	-	(1.00)	(1.00)	(1.00)	(1.00)	(1.00)	(1.00)	(1.00)	(1.00)	(1.00)	(1.00)
Projected Benefit Obligation	17.00	17.00	13.00	13.00	14.00	12.00	13.00	14.00	13.00	9.00	8.00
Over(Under) Funded Post Ret Benefits	(17.00)	(17.00)	(13.00)	(13.00)	(14.00)	(12.00)	(13.00)	(14.00)	(13.00)	(9.00)	(8.00)
Other Post-Retirement Funding Ratio	-	-	-	-	-	-	-	-	-	-	-
Actuarial Assumptions											
Pension											
Expected Return on Plan Assets	6.33	6.34	4.78	4.07	2.64	2.61	5.44	5.16	4.31	--	--
Discount Rate used on Plan Liabilities	4.60	4.37	3.90	2.70	2.60	3.00	4.31	3.26	2.27	--	--
Rate of Compensation Increase	--	--	--	--	--	--	--	--	--	--	--
Other Postretirement Benefits											
Expected Return on Plan Assets	--	--	--	--	--	--	--	--	--	--	--
Discount Rate used on Plan Liabilities	--	--	--	--	--	--	--	--	--	2.40	4.90
Health Care Cost Trend Projected(next y	6.70	6.40	6.20	5.90	6.60	6.40	6.20	6.10	6.20	6.10	5.30
Pension Plan Asset Allocation											
Fair Value of Plan Assets	1,218.00	1,296.00	1,162.00	1,148.00	1,221.00	1,062.00	1,145.00	1,254.00	1,194.00	814.00	774.00
Asset Category - Equities %	16.76	17.30	17.81	13.33	19.00	19.00	18.00	14.00	14.00	5.00	-
Asset Category - Debt %	51.48	60.00	54.99	54.88	81.00	81.00	82.00	85.00	84.00	95.00	-
Asset Category - Real Estate %	-	-	-	-	-	-	-	-	-	-	-
Asset Category - Company Stock %	-	-	-	-	-	-	-	-	-	-	-
Asset Category - Cash %	0.19	1.00	-	2.18	-	-	-	1.00	2.00	-	1.00
Asset Category - Other %	2.43	2.00	2.24	2.44	-	-	-	-	-	-	-
Expected Pension Payments											
Year 1	100.00	100.00	98.00	93.00	95.00	94.00	91.00	86.00	85.00	79.00	74.00
Year 2	98.00	97.00	95.00	91.00	94.00	92.00	88.00	83.00	84.00	76.00	72.00
Year 3	96.00	95.00	93.00	88.00	91.00	89.00	86.00	81.00	81.00	73.00	69.00
Year 4	93.00	93.00	91.00	87.00	88.00	87.00	84.00	79.00	78.00	70.00	66.00
Year 5	91.00	91.00	90.00	84.00	85.00	85.00	81.00	76.00	76.00	69.00	63.00
Beyond Year 5	426.00	427.00	416.00	382.00	393.00	387.00	365.00	336.00	340.00	299.00	275.00
Expected Postretirement Benefits											
Year 1	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Year 2	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Year 3	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Year 4	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Year 5	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Beyond Year 5	5.00	4.00	4.00	4.00	4.00	4.00	4.00	4.00	3.00	3.00	3.00

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