

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	19,000
Ticker:	ODP US

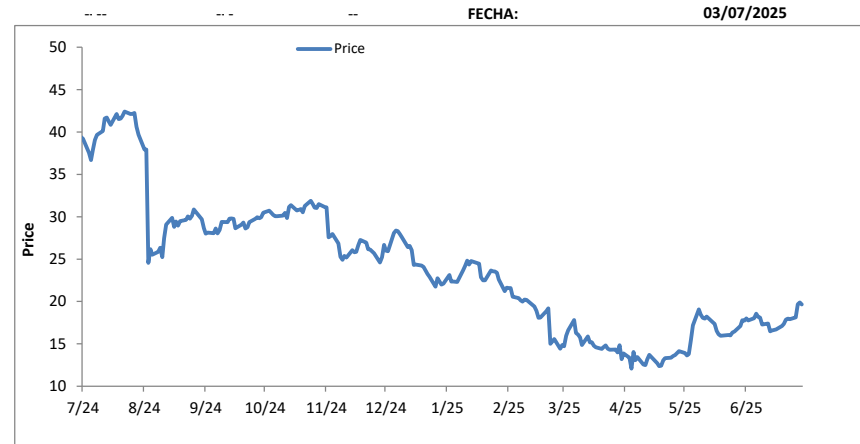
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↓ **19.66** -0.24 (-1.21%)

The ODP Corporation es una sociedad de cartera que opera en Estados Unidos. Sus subsidiarias incluyen The Office Depot Inc, que opera una cadena de tiendas de almacenamiento de productos de oficina en Norteamérica, Europa, Asia y Centroamérica. La empresa vende mercancía de marca y presta servicios a empresas pequeñas y medianas y el mercado de oficinas en el hogar.

Stock Quote & Chart (Currency: USD)			
Last (delayed quote)	19.66	Market Cap (MM)	591.4
Open	19.87	Shares Out. (MM)	30.1
Previous Close	19.90	Float %	94.5%
Change	0.22	Shares sold short (MM)	4,138,986.0
Change %	1.12	Dividend Yield %	--
Day High/Day Low	20.0 / 19.5	Diluted EPS Excl. XO	
52 Wk High/52 Wk low	43.3 / 11.8	P / Diluted EPS Before XO	
Volume (MM)	0.17	Beta	0.89
Avg. Vol - 3 mo (MM)	0.60		

Financial Information (Currency: USD, in mm)			
Revenue - LTM	6,820.0	Cash & ST Invest.	166
EBIT - LTM	90.0	Total Assets	3,529.0
EBITDA - LTM	185.0	Total Debt	1,322.0
Net Income - LTM	-47.0	Total Liabilities	2,722.0
Total Enterprise Value	1,404	Total Equity	807.0
TEV/ Total Revenue	0.2 x	Cash from Operations - LTM	149.0
TEV/ EBITDA	7.3 x	Cash From Investing - LTM	-106.0
		Cash from Financing -LTM	-138.0



Company Notes

A gain of \$16.982 from Sale of Investments

2014 Q4
 GAAP Net Income Includes: (in millions, pre-tax)
 A loss of \$22.051 from Merger/Acquisition Expense
 A loss of \$1.450 from Legal Expense
 A gain of \$0.700 from Sale of Investments

2014 Q3
 GAAP Net Income Includes: (in millions, pre-tax)
 A loss of \$2.235 from Restructuring
 A gain of \$0.100 from Sale of Investments
 A gain of \$0.329 from Merger/Acquisition Expense

2014 Q2
 GAAP Net Income Includes: (in millions, pre-tax)
 A loss of \$4.984 from Merger/Acquisition Expense
 A loss of \$2.290 from Legal Expense
 A gain of \$1.600 from Sale of Investments

2014 Q1
 GAAP Net Income includes, (in millions, pre-tax):
 a loss of \$4.946 from Acquisition/Merger

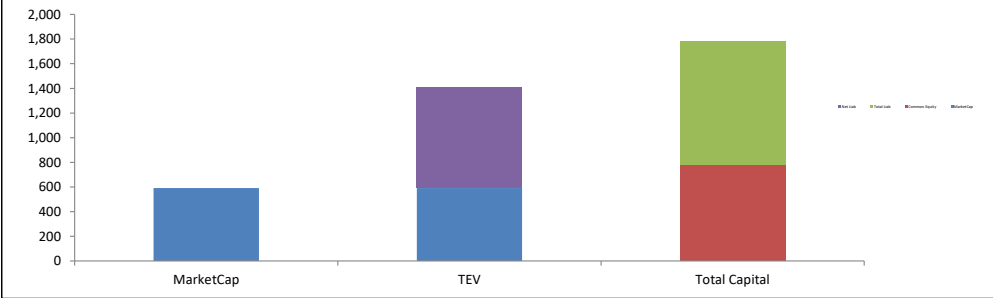
2013 Q3
 GAAP Net Income Includes: (in millions, pre-tax)
 A loss of \$4.666 from Merger/Acquisition Expense
 A gain of \$0.1 from Sale of Investments

Key Board Members

Name	Title	Organization
Amy L Schioldager	Executive Vice President Board Member Board Member Vice Chairman Board Member	Ishares Us Etf Trust The Odp Corp Corebridge Financial Inc Juma Ventures Boardspan Inc
Cynthia Todd Jamison	Board Member Trustee Chairman Chairman Board Member	Intl Flavors & Fragrances Inc Save The Children Federation I Darden Restaurants Inc Big Lots Inc The Odp Corp
Quincy L Allen	Board Member Board Member Board Member Board Member	Lumen Technologies Inc Abm Industries Inc The Odp Corp Launch New York Inc
Wendy Lee Schoppert	Board Member Chairman Board Member Board Member Board Member Trustee	Fossil Group Inc The Odp Corp Davita Inc Big Lots Inc Nina Hale Consulting Inc Breck School
Gerry P Smith	Chief Executive Officer Board Member	The Odp Corp Arrow Electronics Inc
Shashank Shankar Samant	Senior Managing Executive Officer Lead Director Board Member Chairman Board Member	Hitachi Ltd Rackspace Technology Inc Eureka Forbes Ltd Globallogic Inc The Odp Corp
Kristin A Campbell	Board Member Board Member Board Member	Regency Centers Corp The Odp Corp

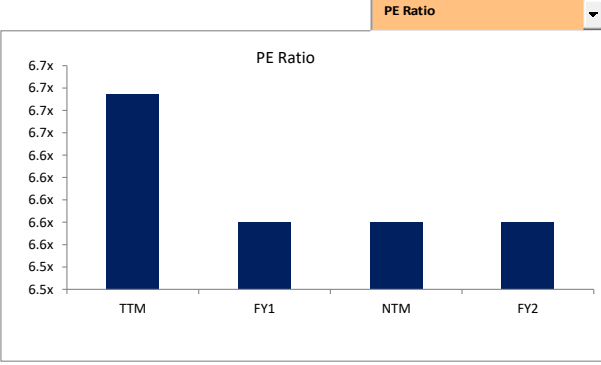
Ticker: ODP US EQUITY		ODP Corp/The										
Period Type		Annuals		Sector: Productos de consumo no básico			Industry: Ventas especializadas		Sub-Industry: Otras ventas minoristas especi			
Annuals												
FY	-6FY	-5FY	-4FY	-3FY	-2FY	-1FY	0FY	-0FQ	1FY	2FY	3FY	
Key Financials												
	Actuals							LTM	Estimates			
For the Fiscal Period Ending	29/12/2018	28/12/2019	26/12/2020	25/12/2021	31/12/2022	30/12/2023	29/03/2025	29/03/2025	31/12/2025	31/12/2026	31/12/2027	
Currency	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD	
Netflix, Inc. opera como un servicio de streaming de suscripción y compañía de producción. Ofrece una gran variedad de programas de televisión, películas, ani												
Total Revenue	11,015.0	9,667.0	8,872.0	8,465.0	8,491.0	7,831.0	6,990.0	1,699.0	6,990.0	1,591.7	1,591.7	
Growth Over Prior Year	7.6%	(12.2%)	(8.2%)	(4.6%)	0.3%	(7.8%)	(10.7%)	(10.2%)	(7.3%)	(7.3%)	(7.3%)	
Gross Profit	2,551.0	2,255.0	1,951.0	1,863.0	1,848.0	1,766.0	1,445.0	1,397.0	--	--	--	
Margin %	23.2%	23.3%	22.0%	22.0%	21.8%	22.6%	20.7%	82.2%	--	--	--	
EBITDA	446.0	806.0	563.0	728.0	706.0	640.0	569.0	185.0	45.7	45.7	45.7	
Margin %	4.0%	8.3%	6.3%	8.6%	8.3%	8.2%	8.1%	10.9%	0.7%	2.9%	2.9%	
EBIT	254.0	224.0	6.0	234.0	243.0	201.0	163.0	90.0	22.6	22.6	22.6	
Margin %	2.3%	2.3%	0.1%	2.8%	2.9%	2.6%	2.3%	5.3%	0.3%	1.4%	1.4%	
Earnings from Cont. Ops.	99.0	127.0	(63.0)	187.0	178.0	139.0	106.0	46.0	--	--	--	
Margin %	0.9%	1.3%	(0.7%)	2.2%	2.1%	1.8%	1.5%	2.7%	--	--	--	
Net Income	104.0	99.0	(319.0)	(208.0)	166.0	139.0	(3.0)	(47.0)	12.8	12.8	12.8	
Margin %	0.9%	1.0%	(3.6%)	(2.5%)	2.0%	1.8%	(0.0%)	(2.8%)	0.2%	0.8%	0.8%	
Diluted EPS Excl. Extra Items	17.7	22.9	(1.2)	3.4	3.6	3.5	2.8	1.4	0.4	0.4	0.4	
Growth Over Prior Year	555.6%	29.4%	--	--	5.6%	(3.0%)	(19.2%)	(34.6%)	(35.2%)	(35.2%)	(35.2%)	

Current Capitalization (Millions)	
Currency	USD
Share Price (USD)	19.66
Shares Out.	30.08
Market Capitalization (USD)	591.42
- Cash & Short Term Investments	185.00
+ Total Debt	998.00
+ Pref. Equity	0.00
+ Total Minority Interest	0.00
= Total Enterprise Value (USD)	1,404.42
Book Value of Common Equity	784.00
+ Pref. Equity	0.00
+ Total Minority Interest	0.00
+ Total Debt	998.00
= Total Capital	1,782.00



Valuation Multiples based on Current Capitalization				
For the Fiscal Period Ending	Actual	LTM	Estimates	
	29/03/2025	29/03/2025	29/03/2025	29/03/2025
TEV/Total Revenue	0.3x	0.2x	--	--
TEV/EBITDA	3.2x	7.3x	--	--
TEV/EBIT	7.8x	15.0x	--	--
P/Diluted EPS Before Extra	8.1x	10.6x	--	--
P/BV	0.8x	0.7x	0.7x	0.7x
Price/Tang BV	2.0x	1.7x	--	--

Valuation Multiples for Chart				
For the Fiscal Period Ending	TTM	FY1	NTM	FY2
PE Ratio	6.7x	6.6x	6.6x	6.6x
TEV / EBITDA	7.3x	0.0x	0.0x	0.0x
Price / CF	4.0x	3.1x	3.1x	3.1x
Price / Book	0.9x	0.7x	0.7x	0.7x
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:	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	28/12/2024
Currency	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD
Revenue	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	6,990.00
Other Revenue	-	-	-	-	-	-	-	-	-	-	-
Total Revenue	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	6,990.00
Cost Of Goods Sold	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	5,545.00
Gross Profit	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	1,445.00
Selling General & Admin Exp.	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	1,282.00
R & D Exp.	-	-	-	-	-	-	-	-	-	-	-
Depreciation & Amort.	-	-	-	-	-	-	-	-	-	-	-
Other Operating Expense/(Income)	-	-	-	-	-	-	-	-	-	-	-
Operating Expense, Total	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	1,282.00
Operating Income	(228.00)	183.00	531.00	327.00	254.00	224.00	6.00	234.00	243.00	201.00	163.00
Interest Expense	87.00	91.00	80.00	62.00	121.00	89.00	42.00	28.00	16.00	20.00	23.00
Interest Income	22.00	22.00	22.00	22.00	25.00	22.00	4.00	1.00	5.00	10.00	9.00
Net Interest Exp.	65.00	69.00	58.00	40.00	96.00	67.00	38.00	27.00	11.00	10.00	14.00
Currency Exchange Gains (Loss)	-	-	-	-	-	-	-	-	-	-	-
Other Non-Operating Inc. (Exp.)	(65.00)	22.00	8.00	(12.00)	(2.00)	(53.00)	(180.00)	(39.00)	(20.00)	(90.00)	(29.00)
EBT Excl. Unusual Items	(228.00)	92.00	465.00	299.00	160.00	210.00	148.00	246.00	252.00	281.00	178.00
Impairment of Goodwill	-	-	-	-	-	-	-	-	-	-	-
Gain (Loss) On Sale Of Assets	7.00	(36.00)	(9.00)	(4.00)	(5.00)	(24.00)	4.00	(5.00)	(4.00)	(4.00)	(1.00)
Asset Writedown	56.00	13.00	15.00	4.00	7.00	56.00	182.00	20.00	14.00	85.00	33.00
Legal Settlements	-	-	-	-	-	-	-	-	-	-	-
Other Unusual Items	(126.00)	46.00	(12.00)	-	(4.00)	(64.00)	(372.00)	(30.00)	(20.00)	(162.00)	(64.00)
EBT Incl. Unusual Items	(291.00)	115.00	459.00	299.00	158.00	178.00	(38.00)	231.00	242.00	200.00	146.00
Income Tax Expense	2.00	23.00	(220.00)	153.00	59.00	51.00	25.00	44.00	64.00	61.00	40.00
Earnings from Cont. Ops.	(293.00)	92.00	679.00	146.00	99.00	127.00	(63.00)	187.00	178.00	139.00	106.00
Extraord. Item & Account. Change	59.00	84.00	150.00	(35.00)	(5.00)	28.00	256.00	395.00	12.00	-	109.00
Minority Int. in Earnings	2.00	-	-	-	-	-	-	-	-	-	-
Net Income	(354.00)	8.00	529.00	181.00	104.00	99.00	(319.00)	(208.00)	166.00	139.00	(3.00)
Pref. Dividends	-	-	-	-	-	-	-	-	-	-	-
Other Adj	-	-	-	-	-	-	-	-	-	-	-
NI to Common Incl Extra Items	(354.00)	8.00	529.00	181.00	104.00	99.00	(319.00)	(208.00)	166.00	139.00	(3.00)
Abnormal Losses (Gains)	478.00	117.00	(59.00)	99.00	119.00	118.00	300.00	66.00	49.00	85.00	9.00
Tax Effect on Abnormal Items	(167.30)	(76.70)	(372.85)	(7.90)	(19.83)	(24.78)	(75.04)	(17.81)	(10.29)	(17.85)	(2.79)
NI to Common Excl. Extra Items	(43.30)	48.30	97.15	272.10	203.17	192.22	(94.04)	(159.81)	204.71	206.15	3.21
Per Share Items											
Basic EPS	(6.60)	0.10	9.80	3.50	18.90	18.20	(6.05)	(3.93)	3.48	3.61	(0.08)
Basic EPS Excl. Extra Items	(5.50)	1.70	12.60	2.80	18.00	23.20	(1.20)	3.54	3.73	3.61	2.83
Weighted Avg. Basic Shares Out.	53.50	54.70	53.90	52.20	5.50	5.44	52.73	52.93	47.70	38.50	37.50
Diluted EPS	(6.60)	0.10	9.60	3.40	18.50	17.90	(6.05)	(3.93)	3.37	3.50	(0.08)
Diluted EPS Excl. Extra Items	(5.50)	1.60	12.40	2.70	17.70	22.90	(1.20)	3.42	3.61	3.50	2.83
Weighted Avg. Diluted Shares Out.	53.50	55.50	53.90	52.20	5.62	5.53	52.73	54.88	49.26	39.71	37.50
Normalized Basic EPS	2.20	4.10	4.60	4.50	3.50	4.10	3.50	4.28	4.40	5.60	3.30
Normalized Diluted EPS	0.29	2.33	4.39	4.45	35.34	39.75	3.07	4.30	4.40	5.19	2.99
Dividends per Share	-	-	-	-	-	-	-	-	-	-	-
Payout Ratio %	-	-	3.97	35.75	5.56	42.83	-	-	-	-	-
Supplemental Items											
EBITA	(134.00)	264.00	588.00	375.00	332.00	696.00	462.00	640.00	584.00	530.00	476.00
EBIT	(228.00)	183.00	531.00	327.00	254.00	224.00	6.00	234.00	243.00	201.00	163.00
As Reported Total Revenue*	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	6,990.00
Effective Tax Rate %	-	20.00	-	51.17	37.34	28.65	-	19.05	26.45	30.50	27.40
Normalized Net Income	15.70	132.30	247.15	237.10	198.17	220.22	161.96	235.19	216.71	206.15	112.21
Interest Capitalized	-	-	-	-	-	-	-	-	-	-	-
Supplemental Operating Expense Items											
Net Rental Exp.	-	-	-	-	-	-	-	-	-	-	-
Stock-Based Comp., Unallocated	35.00	41.00	40.00	28.00	27.00	33.00	41.00	38.00	40.00	36.00	32.00
Stock-Based Comp., Total	35.00	41.00	40.00	28.00	27.00	33.00	41.00	38.00	40.00	36.00	32.00

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:	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	28/12/2024
Currency	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD	USD
ASSETS											
Cash And Equivalents	1,071.00	860.00	763.00	622.00	658.00	698.00	729.00	514.00	403.00	392.00	166.00
Short Term Investments	-	-	-	-	-	-	-	-	-	-	-
Total Cash & ST Investments	1,071.00	860.00	763.00	622.00	658.00	698.00	729.00	514.00	403.00	392.00	166.00
Accounts & Notes Receivable	1,264.00	746.00	687.00	931.00	885.00	1,642.00	442.00	495.00	536.00	487.00	466.00
Total Receivables	1,264.00	746.00	687.00	931.00	885.00	1,642.00	442.00	495.00	536.00	487.00	466.00
Inventories	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	770.00
Prepaid Exp.	158.00	92.00	102.00	86.00	75.00	75.00	49.00	52.00	36.00	28.00	30.00
Restricted Cash	-	-	-	-	-	-	-	-	-	-	-
Other Current Assets	-	956.00	142.00	139.00	-	-	219.00	469.00	107.00	6.00	6.00
Total Current Assets	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	1,438.00
Net Property, Plant & Equipment	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	1,253.00
Long-term Investments	926.00	905.00	885.00	863.00	842.00	-	-	-	-	-	-
Deferred Charges, LT	36.00	11.00	466.00	305.00	284.00	183.00	218.00	219.00	182.00	140.00	102.00
Other Long-Term Assets	701.00	801.00	615.00	1,559.00	1,594.00	1,589.00	1,392.00	844.00	831.00	726.00	736.00
Total Assets	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	3,529.00
LIABILITIES											
Accrued Exp.	-	-	-	-	-	-	-	-	-	-	-
Short-term Borrowings	32.00	51.00	29.00	96.00	95.00	479.00	24.00	20.00	297.00	282.00	273.00
Accounts Payable	1,340.00	987.00	893.00	892.00	1,110.00	1,026.00	857.00	950.00	821.00	755.00	697.00
Curr. Income Taxes Payable	4.00	9.00	3.00	5.00	2.00	8.00	10.00	11.00	17.00	6.00	2.00
Other Current Liabilities	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	571.00
Total Current Liabilities	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	1,543.00
Long-Term Debt	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	1,049.00
Unearned Revenue, Non-Current	-	-	-	-	-	-	-	-	-	-	-
Other Non-Current Liabilities	737.00	649.00	501.00	427.00	411.00	261.00	352.00	181.00	138.00	138.00	130.00
Total Liabilities	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	2,722.00
Pref. Stock, Non-Redeem.	-	-	-	-	-	-	-	-	-	-	-
Total Pref. Equity	-	-	-	-	-	-	-	-	-	-	-
Minority Interest	-	-	-	18.00	-	-	-	-	-	-	-
Additional Paid In Capital	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	2,772.00
Retained Earnings	(990.00)	(982.00)	(453.00)	(273.00)	(173.00)	(89.00)	(409.00)	(617.00)	(451.00)	(312.00)	(315.00)
Treasury Stock	(58.00)	(58.00)	(190.00)	(246.00)	(285.00)	(325.00)	(355.00)	(632.00)	(928.00)	(1,226.00)	(1,526.00)
Comprehensive Inc. and Other	107.00	30.00	(129.00)	(78.00)	(99.00)	(66.00)	(32.00)	(6.00)	(77.00)	(114.00)	(124.00)
Total Common Equity	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	807.00
Total Equity	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	807.00
Total Liabilities And Equity	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	3,529.00
Supplemental Items											
Total Shares Out. on Filing Date	54.52	54.89	51.51	55.40	54.38	5.35	52.69	48.46	42.21	36.96	29.81
Total Shares Out. on Balance Sheet Date	54.52	54.89	51.51	55.40	54.38	5.35	52.69	48.46	42.21	36.96	29.81
Book Value/Share	29.73	29.20	35.95	38.27	39.09	406.03	35.68	29.68	30.49	29.79	27.07
Tangible Book Value	1,158.00	1,187.00	1,456.00	821.00	790.00	841.00	1,429.00	920.00	777.00	653.00	348.00
Tangible Book Value/Share	21.24	21.62	28.27	14.82	14.53	157.14	27.12	18.99	18.41	17.67	11.67
Total Debt	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	1,322.00
Net Debt	470.00	638.00	422.00	1,186.00	881.00	1,564.00	584.00	487.00	759.00	844.00	1,156.00
Total Minority Interest	-	-	-	18.00	-	-	-	-	-	-	-
Inventory Method	--	--	--	--	--	--	--	--	--	--	--
Raw Materials in Inventory	-	-	-	-	-	-	-	-	-	-	-
Work in Progress Inventory	-	-	-	-	-	-	-	-	-	-	-
Finished Goods Inventory	-	-	-	-	-	-	-	-	-	-	-
Other Inventory Accounts	-	-	-	-	-	-	-	-	-	-	-
Accum. Allowance for Doubtful Accts	-	-	-	-	-	-	-	-	-	-	-
Full Time Employees	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	19,000.00

ODP Corp/The

[illegible]

Ticker: ODP US EQUITY

Period Type: Annuals

Sort: Ascend

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												
		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	28/12/2024
TEV / LTM Total Revenue	Close	0.4x	0.3x	0.2x	0.3x	0.2x	0.2x	0.2x	0.3x	0.3x	0.4x	0.3x
	Average	0.3x	0.4x	0.3x	0.3x	0.3x	0.2x	0.3x	0.3x	0.3x	0.3x	0.3x
	High	0.5x	0.5x	0.4x	0.3x	0.3x	0.3x	0.3x	0.4x	0.3x	0.4x	0.4x
	Low	0.2x	0.3x	0.2x	0.2x	0.2x	0.1x	0.2x	0.2x	0.2x	0.3x	0.2x
TEV / LTM EBITDA	Close	107.9x	8.5x	3.9x	6.5x	5.0x	2.1x	3.7x	3.3x	3.8x	4.6x	3.2x
	Average	875.7x	100.4x	7.1x	3.9x	5.6x	4.8x	3.4x	5.1x	3.4x	3.7x	3.5x
	High	1349.2x	117.0x	11.2x	6.2x	6.4x	6.6x	3.9x	5.9x	4.0x	4.6x	4.6x
	Low	106.8x	8.5x	3.9x	2.8x	4.8x	3.5x	2.9x	3.4x	2.6x	3.3x	2.4x
TEV / LTM EBIT	Close	--	20.3x	5.2x	9.7x	8.9x	7.6x	24.2x	8.4x	9.1x	10.8x	7.8x
	Average	--	20.3x	16.8x	5.2x	8.4x	8.5x	12.4x	33.1x	8.7x	8.9x	8.3x
	High	--	20.3x	26.7x	9.3x	9.4x	13.4x	24.2x	38.4x	9.9x	10.9x	10.8x
	Low	--	20.3x	5.3x	3.7x	7.1x	6.1x	10.3x	8.8x	6.8x	7.8x	5.7x
Price / LTM EPS	Close	301.2x	24.1x	10.3x	8.0x	0.7x	0.7x	9.3x	9.1x	10.4x	10.8x	7.7x
	Average	5.7x	277.8x	19.3x	10.3x	6.3x	0.7x	0.6x	14.0x	9.4x	10.7x	7.6x
	High	301.2x	329.9x	33.2x	14.1x	8.1x	1.1x	9.3x	16.3x	11.2x	13.3x	10.9x
	Low	3.3x	24.1x	10.3x	6.9x	0.7x	0.4x	0.4x	9.1x	6.7x	9.1x	4.5x
Price / Book Value	Close	3.0x	1.9x	1.3x	0.9x	0.6x	0.1x	0.8x	1.3x	1.5x	1.9x	0.8x
	Average	1.4x	2.7x	1.5x	1.3x	0.7x	0.6x	0.1x	1.2x	1.4x	1.5x	1.3x
	High	3.0x	3.3x	2.6x	1.7x	0.9x	1.0x	0.8x	1.4x	1.6x	1.9x	1.9x
	Low	1.0x	1.8x	1.0x	0.8x	0.5x	0.1x	0.0x	0.8x	1.0x	1.3x	0.8x
Price / Tangible Book Value	Close	4.2x	2.6x	1.6x	2.4x	1.7x	0.2x	1.1x	2.1x	2.5x	3.2x	2.0x
	Average	1.8x	3.8x	2.1x	1.6x	1.9x	1.6x	0.1x	1.6x	2.1x	2.5x	2.2x
	High	4.2x	4.6x	3.6x	2.4x	2.4x	2.6x	1.1x	2.1x	2.5x	3.2x	3.2x
	Low	1.3x	2.5x	1.4x	1.1x	1.3x	0.2x	0.1x	1.0x	1.5x	2.2x	1.3x
Price / Cash Flow	Close	30.5x	24.3x	6.6x	4.0x	0.2x	0.4x	3.1x	6.0x	9.2x	6.5x	6.6x
	Average	30.5x	28.2x	19.5x	6.6x	3.2x	0.2x	0.3x	4.7x	6.2x	9.4x	4.6x
	High	30.5x	33.4x	33.6x	9.0x	4.1x	0.4x	3.1x	6.0x	9.2x	11.8x	6.6x
	Low	30.5x	18.4x	6.6x	4.0x	0.2x	0.1x	0.2x	3.1x	4.4x	6.5x	2.7x
TEV / LTM FCF	Close	80.2x	--	9.4x	5.8x	0.3x	0.6x	3.5x	7.6x	15.7x	9.6x	26.9x
	Average	80.2x	74.2x	9.4x	9.4x	4.6x	0.3x	0.6x	5.3x	7.9x	16.2x	6.8x
	High	80.2x	87.8x	9.4x	12.8x	5.9x	0.6x	3.5x	7.6x	15.7x	20.2x	26.9x
	Low	80.2x	48.3x	9.4x	5.8x	0.3x	0.2x	0.3x	3.5x	5.6x	9.6x	4.0x
Dividend Yield	Close	0.0	0.0	1.1	2.8	4.0	38.0	0.9	0.0	0.0	0.0	0.0
	Average	0.0	0.0	0.0	1.1	3.6	4.7	45.0	0.6	0.0	0.0	0.0
	High	0.0	0.0	1.1	2.8	5.0	38.0	71.4	0.9	0.0	0.0	0.0
	Low	0.0	0.0	0.0	0.8	2.8	2.7	0.9	0.0	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

	-10FQ	-9FQ	-8FQ	-7FQ	-6FQ	-5FQ	-4FQ	-3FQ	-2FQ	-1FQ	0FQ
For the Fiscal Period Ending	24/09/2022	31/12/2022	01/04/2023	01/07/2023	30/09/2023	30/12/2023	30/03/2024	29/06/2024	28/09/2024	28/12/2024	29/03/2025
Profitability											
Return on Assets	-2.6%	3.7%	4.3%	4.5%	4.6%	3.5%	2.1%	-0.7%	-1.0%	-0.1%	-1.3%
Return on Capital	-4.1%	7.2%	8.7%	9.0%	9.3%	6.4%	4.7%	-0.7%	-1.3%	0.6%	-1.6%
Return on Equity	-7.4%	12.2%	13.9%	14.2%	14.5%	11.6%	7.4%	-2.4%	-3.7%	-0.3%	-5.1%
Margin Analysis											
Gross Margin	22.4%	21.2%	22.8%	21.8%	23.6%	21.9%	21.9%	19.9%	20.4%	20.4%	21.2%
SG&A Margin	--	--	--	--	--	--	--	--	--	--	--
EBITDA Margin	4.2%	4.4%	4.6%	4.8%	5.0%	4.0%	3.1%	2.5%	2.6%	3.4%	2.7%
EBT Margin	2.6%	2.9%	3.1%	3.4%	3.5%	2.6%	1.6%	1.1%	1.2%	2.0%	1.3%
Earnings from Cont. Ops Margin	3.9%	2.6%	4.5%	2.4%	4.5%	-1.7%	1.0%	0.0%	5.7%	1.2%	-1.9%
Net Income Margin	3.1%	6.8%	3.4%	1.8%	3.5%	-2.0%	0.8%	-4.3%	3.3%	-0.2%	-1.7%
Normalized Net Income Margin	3.4%	1.8%	3.5%	2.0%	3.6%	1.1%	2.1%	1.1%	1.1%	1.2%	1.9%
Free Cash Flow Margin	6.4%	6.0%	6.2%	-1.7%	4.3%	2.3%	0.2%	-1.5%	3.0%	0.1%	2.1%
Asset Turnover											
Total Asset Turnover	1.7x	1.9x	2.0x	2.0x	1.9x	1.9x	2.0x	1.9x	1.9x	1.9x	1.9x
Fixed Asset Turnover	6.1x	6.4x	6.5x	6.4x	6.4x	6.1x	6.4x	6.9x	6.5x	6.4x	6.4x
Account's Receivable Turnover	15.7x	16.5x	15.4x	15.5x	14.9x	15.5x	15.5x	15.1x	15.1x	14.7x	14.6x
Inventory Turnover	7.6x	7.9x	7.7x	7.6x	7.6x	7.6x	7.7x	7.7x	7.9x	7.7x	7.5x
Quick Term Liquidity											
Current Ratio	1.1x	1.0x	1.0x	1.0x	1.0x	1.0x	0.9x	0.9x	0.9x	0.9x	0.9x
Quick Ratio	0.6x	0.5x	0.5x	0.5x	0.5x	0.4x	0.4x	0.4x	0.4x	0.4x	0.4x
Cash from Ops. To Fin. Liab.	0.7x	0.7x	0.7x	0.7x	0.7x	0.7x	0.7x	0.1x	0.1x	0.1x	0.1x
Acc. From Sales/Chg.	29.1x	34.1x	34.1x	34.3x	35.6x	33.8x	33.7x	34.1x	37.7x	34.8x	35.0x
Acc. From Investments/Chg.	47.9x	47.1x	46.8x	47.1x	49.1x	47.9x	47.1x	50.9x	49.9x	50.8x	49.9x
Acc. From Financials/Chg.	47.9x	46.7x	51.4x	49.9x	47.9x	47.9x	47.9x	51.7x	47.9x	51.7x	49.4x
Acc. From Transactions/Chg.	31.8x	19.9x	17.4x	31.8x	35.0x	31.8x	19.1x	37.7x	35.9x	37.6x	36.1x
Lower Term Solvency											
Total Debt/Equity	68.9%	80.1%	80.7%	74.6%	81.4%	117.1%	85.7%	117.7%	127.9%	163.8%	127.7%
Total Debt/Total	57.1%	67.4%	67.4%	61.4%	68.1%	92.8%	66.1%	92.8%	107.9%	147.1%	96.0%
LT Debt/Equity	68.9%	67.7%	79.7%	75.8%	80.0%	86.4%	88.1%	111.1%	137.1%	130.0%	136.1%
LT Debt/Total	56.9%	55.9%	49.4%	49.9%	48.4%	57.9%	54.4%	64.9%	69.9%	69.9%	69.9%
Total Liabilities/Total Assets	71.7%	74.7%	75.9%	70.7%	76.9%	78.1%	77.9%	70.6%	71.6%	83.4%	73.9%
EBIT / Interest Exp.	8.0x	11.0x	10.0x	9.7x	10.7x	16.7x	4.7x	4.0x	17.0x	7.7x	4.7x
EBITDA / Interest Exp.	11.0x	17.0x	15.0x	14.0x	14.0x	18.0x	11.0x	11.0x	21.0x	14.0x	17.0x
EBITDA / APPE / Interest Exp.	91.0x	11.0x	10.0x	10.7x	10.0x	16.0x	3.0x	1.0x	17.3x	7.7x	7.7x
Total Debt/EBITDA	6.1x	7.1x	7.1x	7.1x	7.1x	7.1x	7.1x	7.1x	7.1x	7.1x	7.1x
Net Debt/EBITDA	1.7x	2.0x	1.4x	1.7x	1.7x	2.0x	2.0x	2.0x	2.0x	2.0x	2.0x
Adjusted Y. Growth	1.1%	1.8%	1.4%	1.4%	1.8%	1.7%	1.1%	1.1%	1.4%	1.4%	1.1%
Growth Over Nine Year											
Total Revenue	(7.76)	1.1%	(7.76)	(6.76)	(7.76)	(14.76)	(11.76)	(10.76)	(11.46)	(10.76)	(9.76)
Gross Profit	(1.66)	(7.76)	(7.76)	(7.76)	(7.76)	(14.76)	(14.76)	(14.76)	(14.76)	(14.76)	(14.76)
EBITDA	(7.76)	39.4%	11.4%	31.0%	1.4%	(104.76)	(67.46)	(79.76)	5.0%	(1.700.76)	(10.60)
EBT	--	--	--	--	--	--	--	--	--	--	--
EBT	(19.76)	77.4%	35.0%	64.1%	8.1%	(154.46)	(81.16)	(100.76)	17.1%	(164.46)	(77.76)
Earnings from Cont. Ops	(19.76)	10.7%	30.7%	30.7%	4.1%	(201.46)	(17.76)	(11.76)	(17.76)	(17.76)	(17.76)
Net Income	(19.76)	(106.76)	30.7%	39.4%	4.1%	(114.46)	(79.76)	(114.76)	(17.16)	(81.76)	(79.76)
Normalized Net Income	(19.76)	8.1%	30.7%	30.7%	4.1%	(201.46)	(88.76)	(88.76)	(17.76)	(17.76)	(17.76)
Diluted EPS before Extra	7.7%	75.0%	54.9%	174.1%	11.4%	(730.76)	(79.46)	(111.86)	14.0%	(140.76)	(147.56)
Account's Receivable	77.4%	8.1%	(8.46)	(8.86)	(8.76)	(11.16)	(11.16)	(9.76)	1.5%	(4.76)	(6.46)
Inventory	6.4%	(1.46)	(8.46)	(15.46)	(15.46)	(7.46)	(7.46)	(6.46)	(9.46)	9.4%	9.4%
Net PP&E	(15.46)	(15.76)	(9.76)	(9.76)	8.1%	8.1%	8.1%	8.1%	(17.76)	(6.46)	(17.76)
Total Assets	(17.46)	(14.76)	(10.76)	(11.56)	(9.46)	(6.76)	(7.46)	(7.86)	(7.76)	(9.76)	(7.76)
Tangible Book Value	(17.46)	(1.16)	(17.46)	(17.46)	(18.46)	(4.46)	4.4%	(74.46)	(76.46)	(53.46)	(49.46)
Common Equity	(18.46)	(17.46)	(17.46)	(17.46)	(18.46)	(17.46)	(17.46)	(17.46)	(17.46)	(17.46)	(17.46)
Cash from Ops.	(4.76)	(177.46)	474.7%	491.46)	(1.16)	(54.76)	(79.46)	37.4%	(15.46)	(60.46)	50.0%
Capital Expenditures	50.4%	19.7%	39.4%	39.4%	19.7%	29.4%	29.4%	29.4%	29.4%	29.4%	29.4%
Unlevered Free Cash Flow	(9.46)	(117.76)	1.444.4%	(76.56)	(17.06)	(67.76)	(67.76)	(18.46)	(16.16)	(85.46)	1.100.0%
Unlevered Free Cash Flow	(9.46)	(117.76)	1.444.4%	(76.56)	(17.06)	(67.76)	(67.76)	(18.46)	(16.16)	(85.46)	1.100.0%
Dividend per Share	--	--	--	--	--	--	--	--	--	--	--
F&B Over Three Years											
Total Revenue	(7.76)	0.5%	(1.16)	(4.76)	(4.76)	(4.76)	(7.76)	(8.76)	(9.46)	(17.76)	(10.76)
Gross Profit	(1.66)	(1.66)	(1.66)	(1.66)	(1.66)	(1.66)	(1.66)	(1.66)	(1.66)	(1.66)	(1.66)
EBITDA	(1.16)	(7.76)	8.1%	6.0%	(7.76)	--	(54.46)	(41.76)	4.7%	(79.46)	--
EBT	--	--	--	--	--	--	--	--	--	--	--
EBT	(9.76)	60.4%	17.4%	31.8%	16.4%	--	(100.76)	10.7%	100.76)	--	--
Earnings from Cont. Ops	(9.76)	7.8%	6.4%	31.8%	(7.76)	--	(7.76)	6.4%	(44.76)	--	--
Net Income	8.4%	(7.86)	16.4%	31.8%	(16.46)	(41.76)	--	(7.76)	--	--	--
Normalized Net Income	(7.76)	7.7%	6.1%	31.76)	(16.46)	(41.76)	--	(7.76)	--	--	--
Diluted EPS before Extra	46.9%	11.4%	31.4%	57.7%	16.0%	--	(19.46)	--	37.4%	(37.76)	--
Account's Receivable	(1.46)	10.1%	(17.76)	(11.06)	6.0%	(9.76)	(9.46)	(1.56)	(6.46)	(1.46)	(1.46)
Inventory	(7.76)	(4.46)	(7.76)	(4.46)	(7.76)	(4.46)	(7.76)	(7.46)	(1.46)	(7.76)	(7.76)
Net PP&E	(15.46)	(15.46)	(15.46)	(15.46)	(15.46)	(15.46)	(15.46)	(15.46)	(15.46)	(15.46)	(15.46)
Total Assets	(17.46)	(14.76)	(11.56)	(14.76)	(11.56)	(10.46)	(9.76)	(8.46)	(8.46)	(7.76)	(7.76)
Tangible Book Value	15.4%	(15.46)	(1.16)	(1.16)	(1.16)	(7.76)	(7.76)	(7.76)	(7.76)	(7.76)	(7.76)
Common Equity	(18.46)	(17.46)	(17.46)	(17.46)	(17.46)	(17.46)	(17.46)	(17.46)	(17.46)	(17.46)	(17.46)
Cash from Ops.	(7.76)	--	55.1%	(14.76)	(19.76)	--	17.5%	(44.46)	(37.76)	(57.46)	(59.76)
Capital Expenditures	66.7%	77.7%	50.7%	77.7%	17.7%	5.0%	39.1%	(17.46)	(9.46)	(9.46)	(11.46)
Unlevered Free Cash Flow	(7.76)	--	57.4%	8.9%	(74.46)	--	(47.46)	(56.76)	(18.76)	(47.46)	(47.46)
Unlevered Free Cash Flow	(7.76)	--	57.4%	8.9%	(74.46)	--	(47.46)	(56.76)	(18.76)	(47.46)	(47.46)
Dividend per Share	--	--	--	--	--	--	--	--	--	--	--
F&B Over Three Years											
Total Revenue	(7.76)	11.1%	(8.76)	(4.76)	(5.76)	(4.76)	(4.76)	(4.76)	16.4%	(7.46)	(7.46)
Gross Profit	(10.06)	7.7%	(8.46)	(9.76)	(4.76)	(4.76)	(4.76)	(7.76)	(11.46)	(8.46)	(10.46)
EBITDA	(1.46)	(2.86)	1.1%	15.46)	14.7%	(154.46)	(154.46)	(154.46)	4.7%	(154.46)	(154.46)
EBT	--	--	--	--	--	--	--	--	--	--	--
EBT	(4.46)	(10.46)	5.4%	144.46)	(1.76)	(71.76)	(136.16)	(100.76)	(10.46)	(11.46)	(11.46)
Earnings from Cont. Ops	(4.46)	9.7%	17.4%	(14.46)	17.4%	(14.46)	17.4%	(14.46)	17.4%	(14.46)	(14.46)
Net Income	1.7%	(17.46)	17.4%	(14.46)	17.4%	(17.46)	17.4%	(14.46)	(14.46)	(17.46)	(14.46)
Normalized Net Income	(4.46)	(14.46)	(14.46)	(14.46)	(14.46)	(14.46)	(14.46)	(14.46)	(14.46)	(14.46)	(14.46)
Diluted EPS before Extra	7.7%	46.1%	(41.76)	(147.16)	41.4%	(214.16)	(214.16)	(170.76)	15.4%	(7.46)	(196.76)
Account's Receivable	(10.76)	(11.16)	(14.46)	(8.76)	(6.46)	1.3%	(17.16)	(11.46)	4.5%	(7.76)	(6.46)
Inventory	(4.46)	(7.76)	(7.76)	(4.46)	(7.76)	(4.46)	(7.76)	6.4%	(1.46)	(4.46)	(4.46)
Net PP&E	(15.46)	(14.46)	(14.46)	(10.46)	(10.46)	(6.46)	(6.46)	(17.46)	(15.46)	(15.46)	(15.46)
Total Assets	(15.46)	(17.76)	(14.46)	(11.56)	(11.56)	(17.46)	(17.46)	(17.46)	(11.46)	(10.76)	(8.46)
Tangible Book Value	15.3%	(15.16)	7.0%	5.7%	7.0%	(11.56)	0.5%	(8.46)	(17.16)	(15.06)	(14.76)
Common Equity	(14.46)	(14.46)	(14.46)	(14.46)	(14.46)	(14.46)	(14.46)	(14.46)	(14.46)	(14.46)	(14.46)
Cash from Ops.	(8.46)	1.3%	(14.46)	0.0%	(79.46)	(104.46)	(75.46)	0.0%	(24.46)	(134.46)	71.4%
Capital Expenditures	(7.46)	7.7%	7.7%	7.7%	7.7%	7.7%	7.7%	7.7%	7.7%	7.7%	7.7%
Unlevered Free Cash Flow	(9.46)	(7.46)	11.4%	11.4%	(9.46)	(9.46)	11.4%	11.4%	(16.46)	(11.46)	59.7%
Unlevered Free Cash Flow	(9.46)	(7.46)	11.4%	11.4%	(9.46)	(9.46)	11.4%	11.4%	(16.46)	(11.46)	59.7%
Dividend per Share	(100.06)	(100.06)	--	(100.06)	--	--	--	--	--	--	--
F&B Over Three Years											
Total Revenue	(7.76)	(4.46)	(7.76)	(4.76)	(7.76)	(7.76)	(7.76)	(7.76)	(8.46)	1.3%	(4.46)
Gross Profit	(1.66)	(1.66)	(1.66)	(1.66)	(1.66)	(1.66)	(1.66)	(1.66)	(1.66)	(1.66)	(1.66)
EBITDA	(4.06)	(2.86)	0.2%	(15.06)	(4.2%	(155.86)	(8.46)	(32.86)	(13.96)	(32.86)	(152.26)
EBT	--	--	--	--	--	--	--	--	--	--	--
EBT											

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	30/03/2024	29/06/2024	28/09/2024	28/12/2024	29/03/2025
	%	%	%	%	%
Equity					
Cost of Equity	8.6%	9.5%	10.5%	9.9%	9.0%
Weight of Equity	67.7%	57.4%	46.7%	34.1%	35.0%
+ Debt					
Cost of Debt	3.8%	3.6%	2.8%	4.6%	4.0%
Weight of Debt	32.3%	42.6%	53.3%	65.9%	65.0%
+ Preferred Equity					
Cost of Pref Equity	0.0%	0.0%	0.0%	0.0%	0.0%
Weight of Pref Equity	0.0%	0.0%	0.0%	0.0%	0.0%
WACC	7.1%	7.0%	6.4%	6.4%	5.7%

Capital Structure					
For the Fiscal Period Ending	30/03/2024	29/06/2024	28/09/2024	28/12/2024	29/03/2025
Currency	USD	USD	USD	USD	USD
	Millions	Millions	Millions	Millions	Millions
	% of Total	% of Total	% of Total	% of Total	% of Total
Net Market Cap	10.0	10.0	10.0	273.0	9.0
LT Borrowings	906.0	992.0	1,037.0	1,049.0	989.0
Pref Equiv	0.0	0.0	0.0	0.0	0.0
Total Capital	2,836.6	2,349.8	1,963.5	2,005.4	1,536.0
	100.0%	100.0%	100.0%	100.0%	100.0%

Debt Summary Data					
For the Fiscal Period Ending	30/03/2024	29/06/2024	28/09/2024	28/12/2024	29/03/2025
Currency	USD	USD	USD	USD	USD
	Millions	Millions	Millions	Millions	Millions
	% of Total	% of Total	% of Total	% of Total	% of Total
Total Financial Debt	689.0	641.0	536.0	478.0	468.0
Total Revolving Credit	75.2%	64.0%	51.2%	36.2%	46.9%
Total Capital Leases	--	--	--	28.0	2.1%
General/Other Borrowings	--	36.0%	511.0	61.7%	530.0
Total Principal Due	916.0	1,002.0	1,047.0	1,322.0	998.0
	100.0%	100.0%	100.0%	100.0%	100.0%
Total Debt Outstanding	916.0	1,002.0	1,047.0	1,322.0	998.0

Additional Totals					
Total Cash & ST Investments	282.0	180.0	181.0	166.0	185.0
Net Debt	634.0	822.0	866.0	1,156.0	813.0
Total Short-Term Borrowings	10.0	10.0	10.0	273.0	9.0
Curr. Port. of LT Debt/Cap. Leases	--	--	--	--	--
(Long-Term Debt Incl. Cap. Leases)	906.0	992.0	1,037.0	1,049.0	989.0
Total Secured Debt	--	--	--	--	--
Fixed Rate Debt	--	--	--	--	--
Variable Rate Debt	--	--	--	--	--

Credit Ratios					
Net Debt/EBITDA	2.7x	4.5x	4.6x	4.9x	4.4x
Total Debt/EBITDA	3.8x	5.5x	5.5x	5.6x	5.4x
Operating Income/Total Debt	0.0x	0.0x	0.1x	0.0x	0.0x
LTM FCF/Total Debt	0.1x	0.1x	0.1x	0.0x	0.1x
LTM FCF/Total Debt	0.2x	0.2x	0.2x	0.1x	0.1x
FRIT/Interest Expense	4.5x	0.0x	17.0x	2.5x	-4.6x
FRIT/Total Interest Expense	4.5x	0.0x	17.0x	2.5x	-4.6x
Degree of Financial Leverage	1.3x	0.0x	1.1x	1.7x	--
EBITDA/CAPEX/Interest Expense	3.0x	1.0x	17.3x	2.3x	-3.7x
EBITDA/Total Interest Expense	11.8x	4.0x	21.0x	5.5x	-0.7x

Debt Schedule					
Debt Schedule in Yr 1	--	--	--	10.0	3.6%
Debt Schedule in Yr 2	--	--	--	40.0	14.3%
Debt Schedule in Yr 3	--	--	--	37.0	13.3%
Debt Schedule in Yr 4	--	--	--	3.0	1.1%
Debt Schedule in Yr 5	--	--	--	175.0	62.7%
Debt Schedule - Years 2 - 3	--	--	--	77.0	27.6%
Debt Schedule - Years 4 - 5	--	--	--	178.0	63.8%
Debt Schedule - Years 2 - 5	--	--	--	255.0	91.4%
Debt Schedule Beyond Yr 5	--	--	--	17.0	6.1%
Debt Schedule - Total Debt	--	--	--	278.0	100.0%

Capital Lease Schedule					
Capital Leases - Year 1	--	--	--	10.0	32.3%
Capital Leases - Year 2	--	--	--	9.0	29.0%
Capital Leases - Year 3	--	--	--	7.0	22.6%
Capital Leases - Year 4	--	--	--	3.0	9.7%
Capital Leases - Year 5	--	--	--	1.0	3.2%
Capital Leases - Years 2 - 3	--	--	--	16.0	51.6%
Capital Leases - Years 4 - 5	--	--	--	4.0	12.9%
Capital Leases - Years 2 - 5	--	--	--	20.0	64.5%
Capital Leases Beyond Year 5	--	--	--	1.0	3.2%
Total Future Value of Capital Leases	--	--	--	31.0	100.0%
Present Value of ST Capital Leases	--	--	--	9.0	--
Present Value of LT Capital Leases	--	--	--	19.0	--

Operating Leases (Rental Expense) Schedule					
Rental Expense - Year 1	--	--	--	326.0	26.6%
Rental Expense - Year 2	--	--	--	284.0	23.2%
Rental Expense - Year 3	--	--	--	236.0	18.5%
Rental Expense - Year 4	--	--	--	160.0	13.1%
Rental Expense - Year 5	--	--	--	101.0	8.3%
Rental Expense - Years 2 - 3	--	--	--	510.0	41.7%
Rental Expense - Years 4 - 5	--	--	--	261.0	21.3%
Rental Expense - Years 2 - 5	--	--	--	771.0	63.0%
Rental Expense Beyond Year 5	--	--	--	127.0	10.4%
Total Sublease Income	--	--	--	--	--
Future Min Oper Lease Obligations	--	--	--	1,224.0	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 - Long-term Debt	--	--	--	--	--

Ticker: ODP US EQUITY

ODP US EQUITYAscend

CurrencyReportingChangeUSD

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
REVENUE											
Revenue by Product											
For the Fiscal Period Ending	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	28/12/2024
Revenue	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	6,990.00
ODP Business Solutions Division	6,528.00	6,004.00	5,603.00	5,108.00	5,282.00	5,327.00	4,435.00	4,345.00	4,451.00	3,904.00	3,578.00
Office Depot Division	6,013.00	5,708.00	5,400.00	4,962.00	4,641.00	4,363.00	4,167.00	3,837.00	4,005.00	3,884.00	3,358.00
Veyer Division	3,400.00	15.00	18.00	156.00	1,086.00	994.00	248.00	252.00	28.00	35.00	54.00
Adjustment	155.00	-	-	14.00	6.00	9.00	22.00	31.00	7.00	8.00	-
Corporate	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
Revenue by Geography											
For the Fiscal Period Ending	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	28/12/2024
Revenue	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	6,990.00
North American Retail Division	6,528.00	6,004.00	5,603.00	5,108.00	5,282.00	5,327.00	4,435.00	4,345.00	4,451.00	3,904.00	3,578.00
North American Business Solutions Division	6,013.00	5,708.00	5,400.00	4,962.00	4,641.00	4,363.00	4,167.00	3,837.00	4,005.00	3,884.00	3,358.00
	3,400.00	15.00	18.00	156.00	1,086.00	994.00	248.00	252.00	35.00	43.00	54.00
	155.00	-	-	14.00	6.00	25.00	22.00	31.00	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-	-

GROSS PROFIT BEF TAX

OPERATING PROFIT BEF TAX

Ticker:	ODP US EQUITY	Sort	Ascend ▾	Currency	☐ Reporting ☐ Change	USD
Period Type	Annually ▾	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	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	28/12/2024
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	62.00	55.00	52.00	45.00	41.00	36.00	33.00	24.00	25.00	40.00	58.00
Expected Return on Plan Assets	(76.00)	(70.00)	(65.00)	(59.00)	(51.00)	(42.00)	(37.00)	(33.00)	(32.00)	(40.00)	(30.00)
Pension Expense (Income)	(11.00)	(12.00)	(6.00)	(8.00)	(7.00)	1.00	(4.00)	(9.00)	(7.00)	(8.00)	(1.00)
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	1,296.00	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	564.00
Actual Return (Loss) on Plan Assets	154.00	(28.00)	146.00	130.00	(49.00)	188.00	171.00	26.00	(272.00)	24.00	8.00
Employer Contribution	--	--	--	2.00	2.00	2.00	9.00	2.00	2.00	2.00	2.00
Benefits Paid	(103.00)	(102.00)	(144.00)	(101.00)	(92.00)	(118.00)	(86.00)	(78.00)	(79.00)	(75.00)	-
Projected Benefit Obligation	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	552.00
Over(Under) Funded Pension	(161.00)	(142.00)	(82.00)	(7.00)	(21.00)	3.00	61.00	107.00	46.00	15.00	12.00
Accumulated Benefit Obligation	--	--	--	--	--	--	--	--	9.00	8.00	--
Pension Funding Ratio	88.95	89.11	93.33	99.43	98.06	100.26	105.11	109.84	105.99	101.98	102.17
Other Postretirement Funded Status											
Fair Value of Plan Assets	-	-	-	-	-	-	-	-	-	-	-
Actual Return (Loss) on Plan Assets	-	-	-	-	-	-	-	-	-	-	-
Employer Contribution	--	--	--	--	--	--	--	--	1.00	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)	(1.00)
Projected Benefit Obligation	17.00	13.00	13.00	14.00	12.00	13.00	14.00	13.00	9.00	8.00	7.00
Over(Under) Funded Post Ret Benefits	(17.00)	(13.00)	(13.00)	(14.00)	(12.00)	(13.00)	(14.00)	(13.00)	(9.00)	(8.00)	(7.00)
Other Post-Retirement Funding Ratio	-	-	-	-	-	-	-	-	-	-	-
Actuarial Assumptions											
Pension											
Expected Return on Plan Assets	6.34	4.78	4.07	2.64	2.61	5.44	5.16	4.31	--	--	--
Discount Rate used on Plan Liabilities	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	4.70
Health Care Cost Trend Projected(next y	6.40	6.20	5.90	6.60	6.40	6.20	6.10	6.20	6.10	5.30	5.20
Pension Plan Asset Allocation											
Fair Value of Plan Assets	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	564.00
Asset Category - Equities %	17.30	17.81	13.33	19.00	19.00	18.00	14.00	14.00	5.00	-	-
Asset Category - Debt %	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 %	1.00	-	2.18	-	-	-	1.00	2.00	-	1.00	1.00
Asset Category - Other %	2.00	2.24	2.44	-	-	-	-	-	-	-	99.00
Expected Pension Payments											
Year 1	100.00	98.00	93.00	95.00	94.00	91.00	86.00	85.00	79.00	74.00	71.00
Year 2	97.00	95.00	91.00	94.00	92.00	88.00	83.00	84.00	76.00	72.00	68.00
Year 3	95.00	93.00	88.00	91.00	89.00	86.00	81.00	81.00	73.00	69.00	65.00
Year 4	93.00	91.00	87.00	88.00	87.00	84.00	79.00	78.00	70.00	66.00	62.00
Year 5	91.00	90.00	84.00	85.00	85.00	81.00	76.00	76.00	69.00	63.00	60.00
Beyond Year 5	427.00	416.00	382.00	393.00	387.00	365.00	336.00	340.00	299.00	275.00	257.00
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	4.00	4.00	4.00	4.00	4.00	4.00	4.00	3.00	3.00	3.00	3.00

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

ODP Corp/The

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

[illegible]