TransDigm Group Inc.

NYSE: TDG

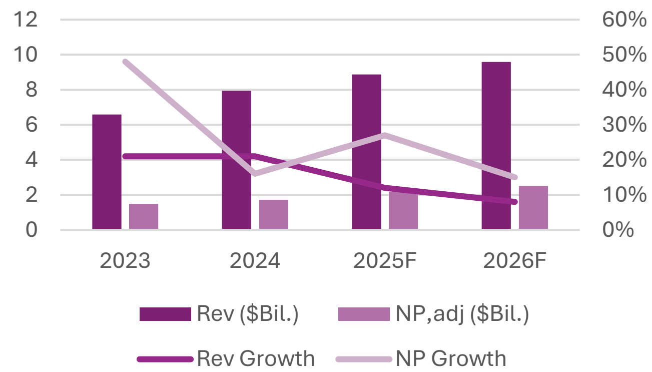
12M Target Price (Bloomberg)
1,530.9 USD

TransDigm Group Inc. is a produce and supplier of aerospace for commercial and military aircraft worldwide. TDG is a major player in the aerospace and defense industry around 63,000 commercial and military aircraft currently in service

TDG product is well diverse, with no single part individually making up a large portion of their revenue but still can arranged by segment such as Commercial Aftermarket and OEM line and Defense line. TDG major product offerings Armtec Defense.(Mortar Systems), Gas Control Valves, retractable restraint, AMLCD displays and many more. TDG product with a relatively high price, so consideration depends on reliability, quality, and timely delivery rather than cost that come with high switching costs.

As of today F2Q25 results with sales and adjusted EBITDA in line with estimates but gross margins decline YoY but implied 2H margin compression is primarily conservatism but large improvements in real productivity significant driver of margin improvement, We think TDG still see further opportunity for productivity gains.

Revenue – Net Profit - %Growth (yoy)



Fundamental Outlook

LAST PRICE	1,429.57
MARKET CAP (Bil.$)	80.29
P/E	45.3
P/BV	N.A.
Dividend Yield (%)	5.26

Technical Outlook

Support	1,350.00	1,280.00
Resistant	1,500.00	1,650.00
Take Profit	1,650.00	1,750.00
Stop <	1,200.00	

เปิดบัญชีลงทุน Global Trade กับ AIRA ได้ที่นี่

AIRA Research
ณรงค์เดช จันทรไพศาล #066063 Tel. 022681717
พีรพล สุรัตนวนิช ผู้ช่วยนักวิเคราะห์
วรภัทร เบญจาพุทธารักษ์ ผู้ช่วยนักวิเคราะห์