BLK · NYSE · WEEK ENDED 24 JUL 2026

Weekly Investor Report

BlackRock Inc · Financial Services · Asset Management

LATEST CLOSE

1,056 USD

-1.5% latest week

Weekly setup

Mixed setup

The weekly trend is not active. Price is 2.0% above the Trend Line and sits at 49.9% of its 52-week range. The latest completed week returned -1.5%, after a 9.4% four-week move. The latest factor snapshot indicates quality is middle-of-the-pack; growth is moderate; valuation is expensive relative to peers. Options positioning is bearish with 53/100 conviction, while the latest news-sentiment score is 55/100. Near-term considerations: earnings are due in 76d.

Technical setup score 47/100. This score describes the weekly technical setup; the conclusion above also considers fundamentals, positioning, sentiment, and event risk.

LATEST CLOSE

1,056 USD

24 Jul 2026

1W RETURN

-1.5%

latest completed week

4W RETURN

9.4%

short-term follow-through

12W RETURN

0.0%

quarterly tape

TREND BREADTH

30.8%

16 of 52 weeks active

VOLUME RATIO

1.0x

vs 13-week average

What is working

- Price is above the Trend Line, keeping the weekly tape constructive.
- Price is above Fair Value, showing premium demand versus the model.
- Activity pressure is positive on the latest completed week.
- Next-week expectancy is positive at 60.64% based on similar historical setup states.

What could go wrong

- The trend backdrop is inactive, so price action has not confirmed a constructive regime.
- Activity pressure is weak, so confirmation is not yet broad enough.
- 9 reversal markers appear in the recent smart-money tape.

What to watch next

- Trend Line remains the key weekly regime level.
- Activity pressure is the gauge to monitor for confirmation or fade.
- A volume ratio above 1.5x would show stronger participation in the next move.

This week's evidence at a glance

PRICE FOLLOW-THROUGH

-1.5%

Latest completed week; four-week move 9.4%.

INDICATOR STACK

17/57

Trend and activity pressure are weighted against the latest 12-week confirmation window.

TREND BACKDROP

Active

The trend backdrop defines the current weekly regime.

PATIENT CAPITAL

Quiet

Activity-pressure buy-signal status for institutional accumulation timing.

NEXT-WEEK EXPECTANCY

Positive 60.64%

Historical one-week expectancy contributes to the evidence score when direction is confirmed.

OPTIONS PRESSURE

Bearish

53/100 conviction; expected move 3.2%.

NEWS SENTIMENT

55/100

52 relevant articles in the latest sentiment read.

EVENT RISK

76d

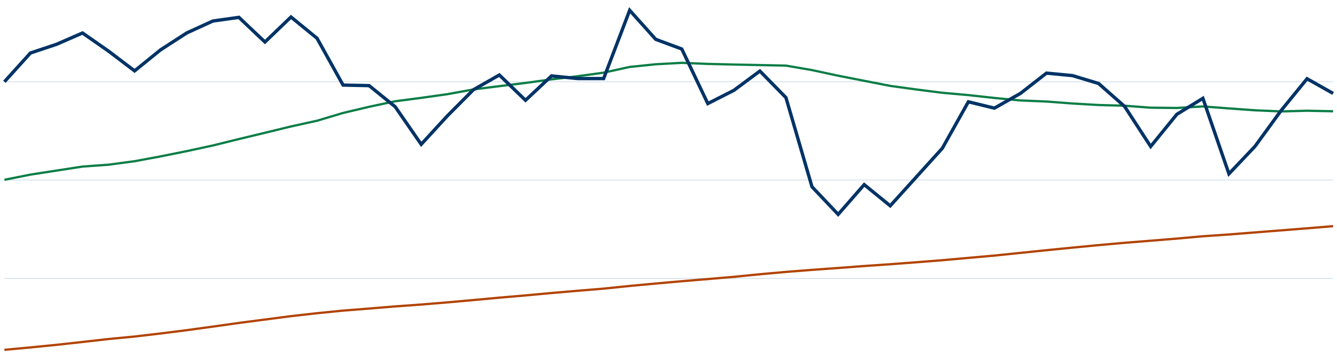
Next report is scheduled for 14 Oct 2026; event risk rises as the date approaches.

01 · PRICE ACTION

Where price is—and whether the trend supports it

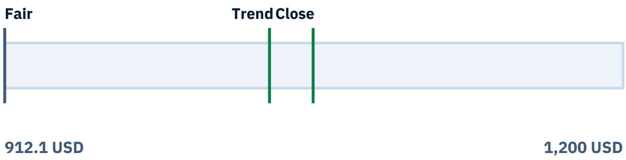
The weekly trend is not active. Price is 2.0% above the Trend Line and sits at 49.9% of its 52-week range. The latest completed week returned -1.5%, after a 9.4% four-week move.

52-week price path



Blue: weekly close · Green: Trend Line · Orange: Sharemaestro Fair Value

Position in the 52-week range



Latest close sits at 49.9% of the 52-week range.

RANGE LOCATION

49.9%

Shows where the latest close sits between the 52-week low and high.

TREND DISTANCE

2.0%

Price premium or discount versus the weekly Trend Line.

FAIR-VALUE GAP

16.6%

Premium demand or model discount versus Sharemaestro Fair Value.

HIGH-WATER GAP

-12.0%

Distance from the latest 52-week high.

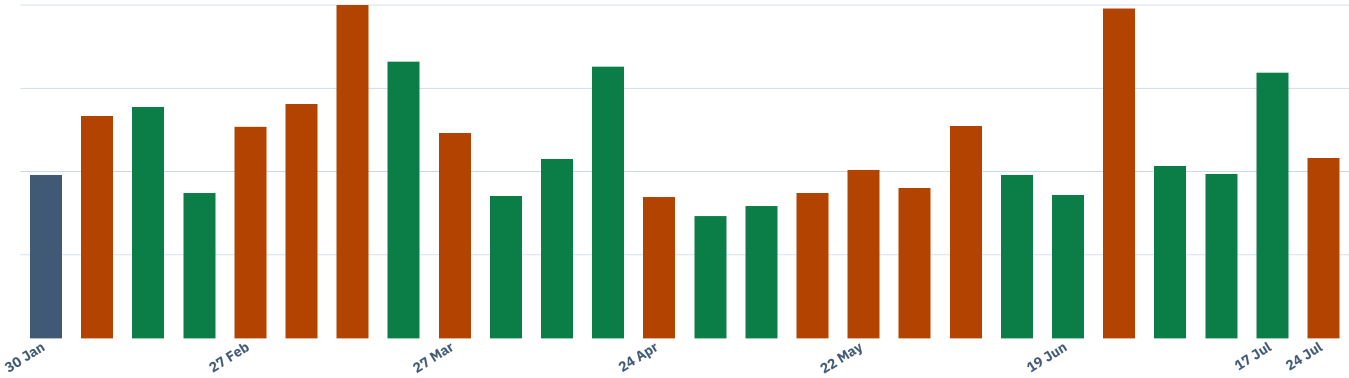
02 · VOLUME AND DEMAND

Is real participation confirming the move?

Latest weekly volume is 1.0x the 13-week average. Participation is around or above normal and provides reasonable confirmation.

26-week volume confirmation

Bar height shows weekly volume. Green marks an up week; orange marks a down week.



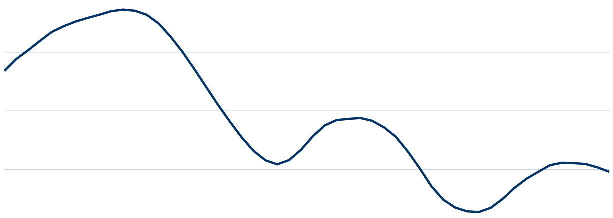
PARTICIPATION	BASELINE	ONE-YEAR BASE	LATEST WEEKLY VOLUME
1.0x	3.6M	3.4M	3.5M
Latest volume versus the 13-week average.	13-week average volume.	52-week average volume.	Most recent completed week.

Demand beneath price

Activity pressure and institutional-style signals

These indicators assess whether participation is improving beneath price. They are supporting evidence, not proof of institutional buying.

Activity pressure path



Latest 0.28 · 12-week average 0.24

12-week confirmation

Signal	Read	Meaning
Trend active	0/12	Active trend-backdrop weeks in the latest 12-week window.
Positive pressure	10/12	Weeks with constructive activity pressure in the latest 12-week window.
Positive leadership	0/12	Weeks with positive relative leadership in the latest 12-week window.
Activity pressure	0.28	Current proprietary activity-pressure read.
Buy signals	0	Accumulation signal count in the latest 12 weeks.
Reversal markers	9	9 reversal markers

No recent accumulation markers. 9 reversal markers.

03 · MOMENTUM AND LEADERSHIP

Is performance persistent—and is the stock leading?

Performance is 9.4% over four weeks, 0.0% over 12 weeks, and -4.0% over one year. The current trend has remained active for 0 consecutive weeks.

Performance by holding period

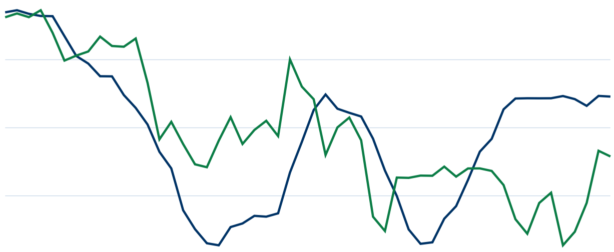
1W	-1.5%
4W	9.4%
12W	0.0%
26W	-5.5%
52W	-4.0%

ACTIVE TREND STREAK
0 weeks
Consecutive active weeks.

ACTIVE WEEKS
16
Latest 52 weeks.

TREND BREADTH
30.8%
Share of active weeks.

Activity pressure vs relative leadership



Blue: activity pressure · Green: relative leadership

PRESSURE
0.39
Latest activity-pressure read.

PRESSURE CHANGE
-1.4%
Four-week change in activity pressure.

LEADERSHIP
-7.79
Latest relative-leadership reading.

RS CHANGE
51.4%
Four-week change in relative leadership.

Technical setup scorecard

Trend	17
Momentum	72
Activity Pressure	57
Relative Leadership	31
Next-Week Expectancy	80
Volume	42
Smart Money	16
Risk Control	60

04 · FUNDAMENTALS AND VALUATION

What investors are paying for—and the quality behind it

The latest factor snapshot indicates quality is middle-of-the-pack; growth is moderate; valuation is expensive relative to peers.

FACTOR WEEK	STATEMENTS THROUGH	FIELD COVERAGE	MODEL CONFIDENCE
26 Jul 2026	31 Dec 2025	97%	97%
Latest published factor snapshot.	Financial reporting period used.	Available factor fields.	Snapshot confidence.

Relative factor standing

Higher display scores are better. Each score is converted from the underlying universe rank, where rank 1 is best.

Overall factor strength	7/100
Value	16/100
Quality	34/100
Momentum	23/100
Growth	36/100

Valuation

How much investors are paying for earnings, sales, and cash flow.

P/E — Price divided by trailing earnings.	24.9x
PRICE / SALES — Market value relative to trailing revenue.	6.0x
EV / EBITDA — Enterprise value relative to operating cash earnings.	16.4x
FREE-CASH-FLOW YIELD — Free cash flow as a share of enterprise value.	2.5%

Business quality

Margins and the return generated on invested capital.

GROSS MARGIN — Gross profit retained from each unit of revenue.	55.7%
OPERATING MARGIN — Operating profit retained from revenue.	34.1%
FREE-CASH-FLOW MARGIN — Free cash flow generated from revenue.	15.8%
RETURN ON INVESTED CAPITAL — Operating return generated on invested capital.	11.7%

04 · FUNDAMENTALS AND VALUATION · CONTINUED

Growth, shareholder returns, and balance-sheet strength

The second half of the fundamental read separates recent business growth from cash returned to shareholders and financial leverage.

Growth and financial strength

Recent business growth and accounting strength.

REVENUE GROWTH	Latest one-year revenue growth.	**26.5%**
EPS GROWTH	Latest one-year earnings-per-share growth.	**2.7%**
FREE-CASH-FLOW GROWTH	Latest one-year free-cash-flow growth.	**-**
PIOTROSKI F-SCORE	Nine-point accounting-strength checklist.	**3/9**

Shareholder return and balance sheet

Cash returned to owners and financial leverage.

DIVIDEND YIELD	Cash dividends relative to market value.	**2.1%**
BUYBACK YIELD	Net share repurchases relative to market value.	**1.1%**
SHAREHOLDER YIELD	Dividend yield plus net buyback yield.	**3.2%**
NET DEBT / EBITDA	Balance-sheet debt relative to operating cash earnings.	**0.5x**

How to read this

Quality and valuation are separate questions. A strong company can still carry a demanding valuation, so profitability, growth, balance-sheet strength, and the price paid for those characteristics should be assessed independently.

The latest factor snapshot indicates quality is middle-of-the-pack; growth is moderate; valuation is expensive relative to peers.

05 · OWNERSHIP, OPTIONS, AND SENTIMENT

What other market participants are doing

Options, insider transactions, market sentiment, and activity-pressure signals can confirm or challenge the price story. None should be used alone.

Options positioning

Bearish

BLK shows bearish options pressure with a 53/100 conviction score, put-call volume ratio of 2.01, expected move of 3.2%, and Sharemaestro trend signal inactive.

CONVICTION

53/100

Options signal conviction.

EXPECTED MOVE

3.2%

Nearest-chain pricing.

PUT/CALL VOLUME

2.01

Contract volume balance.

Pressure	-33
Speculation	44
Volatility	47
Trend agreement	95

Insider activity

-

No recent insider transactions are stored.

Acquisitions / disposals over the latest 180 days. Insider activity is context, not a stand-alone signal.

News sentiment

55/100

Weighted news tone is neutral across 52 relevant articles.

16 positive · 36 neutral · 0 negative

Patient Capital

Quiet

Activity-pressure buy-signal evidence highlights potential institutional accumulation windows.

No recent buy signal

06 · CATALYSTS AND RISK

What can move the shares—and how volatile the path has been

Event timing, options-implied movement, drawdown, and weekly gains and losses frame the risk around the current setup.

NEXT EARNINGS
76d
Next report is scheduled for 14 Oct 2026; event risk rises as the date approaches.

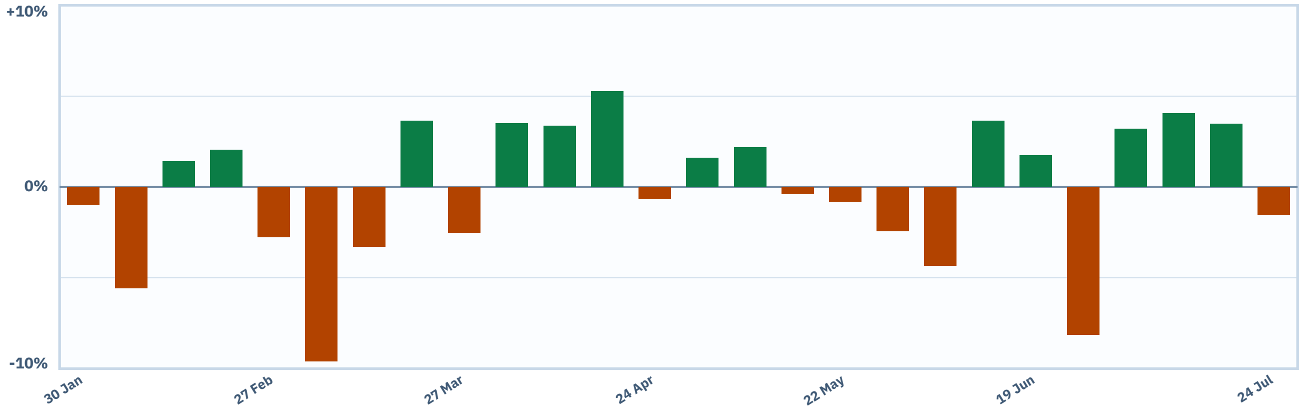
OPTIONS EXPECTED MOVE
3.2%
Nearest-chain priced movement where available.

52-WEEK DRAWDOWN
-12.0%
Distance below the 52-week high.

13-WEEK VOLATILITY
3.5%
Standard deviation of weekly returns.

Weekly gains and losses

Each bar is one completed week. Gains rise above zero; losses fall below it. Taller bars mean a larger move.



WEEKS HIGHER
13 of 26
13 weeks finished lower.

BEST WEEK
+5.3%
Week of 17 Apr.

WORST WEEK
-9.6%
Week of 6 Mar.

LATEST WEEK
-1.5%
Week of 24 Jul.

Shape of recent returns

Strong gains	2
Modest gains	11
Flat weeks	-
Modest losses	9
Sharp losses	4

RECENT VOL
3.5%
13-week weekly-return volatility.

BASE VOL
3.3%
52-week weekly-return volatility.

UP/DOWN SPLIT
27/25
Count of positive and negative weeks in the 52-week window.

AVERAGE SKEW
2.6% / -2.8%
Average positive week versus average negative week.

07 · SECTOR AND PEER CONTEXT

Is this stock leading—or simply moving with its group?

Sector and industry breadth distinguish company-specific strength from a broad group move.

Sector · US Financial Services

4-WEEK RANK
30 / 100
Standing within the tracked group.

GROUP AVERAGE
5.2%
Average four-week return.

TREND BREADTH
58.0%
Share of peers with an active trend.

Peer	Exchange	1W return	4W return	Trend
PYPL	NASDAQ	-0.7%	26.8%	Inactive
KB	NYSE	-1.6%	19.4%	Active
SHG	NYSE	1.0%	18.6%	Active
TRV	NYSE	5.0%	18.3%	Active
ICE	NYSE	4.4%	17.7%	Inactive

Industry · US Asset Management

4-WEEK RANK
17 / 100
Standing within the tracked group.

GROUP AVERAGE
1.9%
Average four-week return.

TREND BREADTH
46.0%
Share of peers with an active trend.

Peer	Exchange	1W return	4W return	Trend
AMP	NYSE	0.2%	16.8%	Inactive
VCTR	NASDAQ	-1.3%	16.5%	Active
ARES	NYSE	0.7%	15.9%	Inactive
IVZ	NYSE	1.0%	14.4%	Active
SEIC	NASDAQ	-0.0%	13.7%	Active

08 · EVIDENCE AND WEEKLY DATA

The underlying research record

Every top-level statement should be traceable to a stored market, fundamental, event, or positioning observation.

Cross-signal evidence matrix

Evidence pillar	Score / read	Summary	Detail
Weekly tape	42/100	Trend, activity pressure, participation, and risk combine to a 42/100 tape read.	
Indicator analysis	23/100	Latest 12-week confirmation: trend 0/12, activity pressure 10/12, relative leadership 0/12.	Activity pressure 0.28; 9 reversal markers
Next-Week Expectancy	Positive 60.64%	Next-week expectancy is positive with a 60.64% historical one-week setup read.	Adds short-term historical context without overriding trend, activity, or relative leadership.
Factors	19/100	O'Shaughnessy factor stack blends value, quality, momentum, and confidence.	Buyback Yield rank 30
SVQF	63/100	Value and quality alignment from the Sharemaestro SVQF framework.	Composite rank 371.5 of 1006
Patient Capital	Quiet	Activity-pressure buy-signal evidence highlights potential institutional accumulation windows.	No recent buy signal
Options	51/100	BLK shows bearish options pressure with a 53/100 conviction score, put-call volume ratio of 2.01, expected move of 3.2%, and Sharemaestro trend signal inactive.	Bearish · Put-side pressure · Expected move 3.2%
Sentiment	55/100	Weighted news tone is neutral across 52 relevant articles.	BlackRock (BLK) Joins Google And Ford To Launch Skilled Trades Alliance
Insiders	50/100	No recent insider transaction evidence is stored.	Not currently available.
Earnings	76d	Next report is scheduled for 14 Oct 2026; event risk rises as the date approaches.	

Current evidence clusters

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-1.5%

Latest completed week; four-week move 9.4%.

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NEWS SENTIMENT

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76d

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08 · EVIDENCE AND WEEKLY DATA · CONTINUED

Recent completed weeks

The completed weekly bars behind the report provide a compact audit trail for price, trend, Fair Value, activity pressure, leadership, and volume.

Week	Close	Return	Trend Line	Fair Value	Pressure	Leadership	Volume	Trend
24 Jul 2026	1,056 USD	-1.5%	1,035 USD	905.4 USD	0.39	-7.79	3.5M	Off
17 Jul 2026	1,072 USD	3.5%	1,036 USD	903.1 USD	0.39	-7.26	5.2M	Off
10 Jul 2026	1,036 USD	4.1%	1,035 USD	900.7 USD	0.30	-12.09	3.2M	Off
03 Jul 2026	995.7 USD	3.2%	1,037 USD	898.4 USD	0.36	-14.75	3.4M	Off
26 Jun 2026	964.7 USD	-8.1%	1,039 USD	896.1 USD	0.39	-16.01	6.5M	Off
19 Jun 2026	1,050 USD	1.8%	1,041 USD	894.0 USD	0.37	-11.14	2.8M	Off
12 Jun 2026	1,032 USD	3.7%	1,039 USD	891.4 USD	0.37	-12.09	3.2M	Off
05 Jun 2026	995.6 USD	-4.4%	1,039 USD	889.0 USD	0.37	-14.94	4.2M	Off
29 May 2026	1,041 USD	-2.4%	1,042 USD	886.7 USD	0.37	-13.59	2.9M	Off
22 May 2026	1,067 USD	-0.8%	1,043 USD	884.1 USD	0.26	-10.43	3.3M	Off
15 May 2026	1,076 USD	-0.3%	1,044 USD	881.2 USD	-0.02	-9.12	2.9M	Off
08 May 2026	1,079 USD	2.2%	1,046 USD	878.3 USD	-0.15	-8.89	2.6M	Off
01 May 2026	1,056 USD	1.6%	1,048 USD	875.2 USD	-0.43	-8.90	2.4M	Off
24 Apr 2026	1,039 USD	-0.7%	1,050 USD	872.3 USD	-0.68	-9.65	2.8M	Off

How to use this report

This is a completed-week research summary. It explains the available evidence and its conflicts; it does not predict a guaranteed outcome or replace your own risk assessment. Fundamental figures may refer to an earlier financial reporting period, which is shown in the fundamentals section.

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