SEIC · NASDAQ · WEEK ENDED 24 JUL 2026

Weekly Investor Report

SEI Investments Company · Financial Services · Asset Management

LATEST CLOSE

99.22 USD

-0.0% latest week

Weekly setup

Constructive, but selective

The weekly trend is active. Price is 15.7% above the Trend Line and sits at 88.9% of its 52-week range. The latest completed week returned -0.0%, after a 13.7% four-week move. The latest factor snapshot indicates quality ranks strongly versus its universe; growth is moderate; valuation is neither clearly cheap nor expensive. Options positioning is mixed with 37/100 conviction, while the latest news-sentiment score is 56/100. Near-term considerations: earnings are due in 84d.

Technical setup score 69/100. This score describes the weekly technical setup; the conclusion above also considers fundamentals, positioning, sentiment, and event risk.

LATEST CLOSE

99.22 USD

24 Jul 2026

1W RETURN

-0.0%

latest completed week

4W RETURN

13.7%

short-term follow-through

12W RETURN

10.6%

quarterly tape

TREND BREADTH

44.2%

23 of 52 weeks active

VOLUME RATIO

1.4x

vs 13-week average

What is working

- The trend backdrop is active with a 12-week active streak.
- 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.

What could go wrong

- 3 reversal markers appear in the recent smart-money tape.

What to watch next

- Price is close to its 52-week high; watch for continuation or exhaustion.
- 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

-0.0%

Latest completed week; four-week move 13.7%.

INDICATOR STACK

66/79

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.

OPTIONS PRESSURE

Mixed

37/100 conviction; expected move 10.6%.

NEWS SENTIMENT

56/100

59 relevant articles in the latest sentiment read.

EVENT RISK

84d

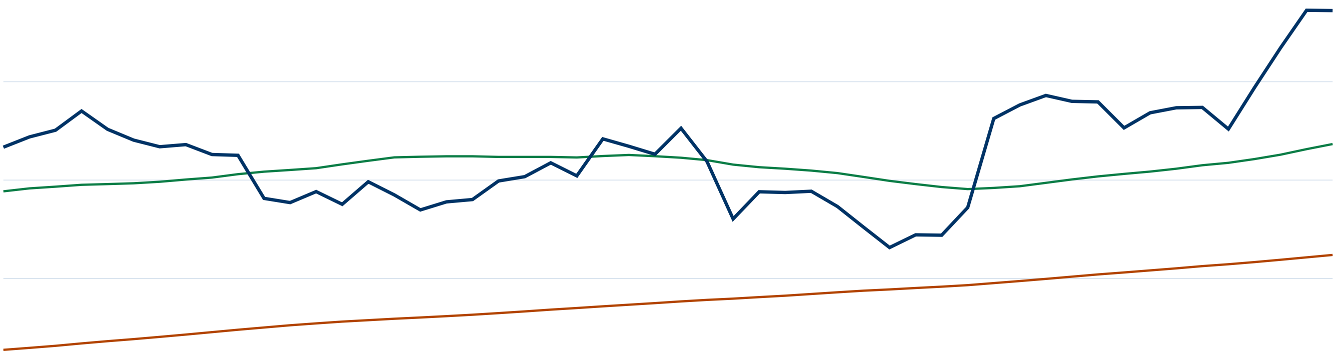
Next report is scheduled for 21 Oct 2026; event risk rises as the date approaches.

01 · PRICE ACTION

Where price is—and whether the trend supports it

The weekly trend is active. Price is 15.7% above the Trend Line and sits at 88.9% of its 52-week range. The latest completed week returned -0.0%, after a 13.7% 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 88.9% of the 52-week range.

RANGE LOCATION

88.9%

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

TREND DISTANCE

15.7%

Price premium or discount versus the weekly Trend Line.

FAIR-VALUE GAP

33.1%

Premium demand or model discount versus Sharemaestro Fair Value.

HIGH-WATER GAP

-3.0%

Distance from the latest 52-week high.

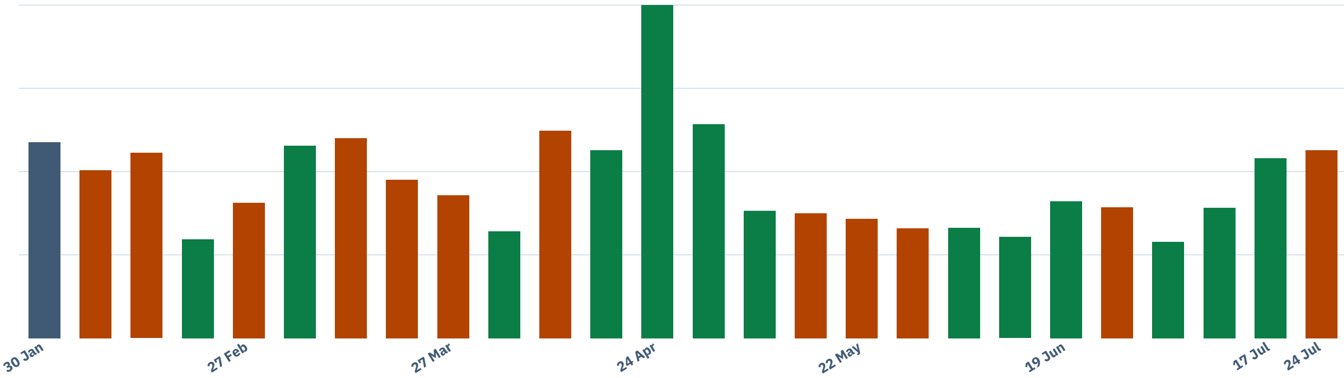
02 · VOLUME AND DEMAND

Is real participation confirming the move?

Latest weekly volume is 1.4x 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.



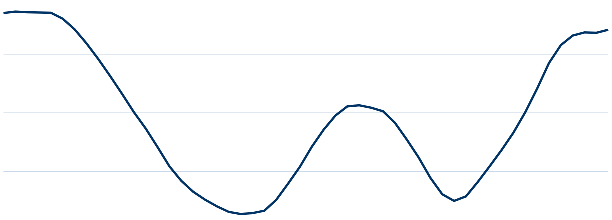
PARTICIPATION	BASELINE	ONE-YEAR BASE	LATEST WEEKLY VOLUME
1.4x	3.5M	3.6M	4.9M
Latest volume versus the 13-week average.	13-week average volume.	52-week average volume.	Most recent completed week.

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 0.79 · 12-week average 0.56

12-week confirmation

Signal	Read	Meaning
Trend active	12/12	Active trend-backdrop weeks in the latest 12-week window.
Positive pressure	12/12	Weeks with constructive activity pressure in the latest 12-week window.
Positive leadership	2/12	Weeks with positive relative leadership in the latest 12-week window.
Activity pressure	0.79	Current proprietary activity-pressure read.
Buy signals	0	Accumulation signal count in the latest 12 weeks.
Reversal markers	3	3 reversal markers

No recent accumulation markers. 3 reversal markers.

03 · MOMENTUM AND LEADERSHIP

Is performance persistent—and is the stock leading?

Performance is 13.7% over four weeks, 10.6% over 12 weeks, and 11.6% over one year. The current trend has remained active for 12 consecutive weeks.

Performance by holding period

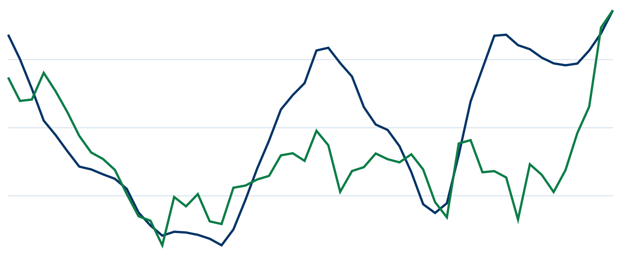
1W	-0.0%
4W	13.7%
12W	10.6%
26W	17.1%
52W	11.6%

ACTIVE TREND STREAK
12 weeks
Consecutive active weeks.

ACTIVE WEEKS
23
Latest 52 weeks.

TREND BREADTH
44.2%
Share of active weeks.

Activity pressure vs relative leadership



Blue: activity pressure · Green: relative leadership

PRESSURE
1.19
Latest activity-pressure read.

PRESSURE CHANGE
92.4%
Four-week change in activity pressure.

LEADERSHIP
7.38
Latest relative-leadership reading.

RS CHANGE
174.5%
Four-week change in relative leadership.

Technical setup scorecard

Trend	66
Momentum	91
Activity Pressure	79
Relative Leadership	86
Next-Week Expectancy	50
Volume	58
Smart Money	41
Risk Control	84

04 · FUNDAMENTALS AND VALUATION

What investors are paying for—and the quality behind it

The latest factor snapshot indicates quality ranks strongly versus its universe; growth is moderate; valuation is neither clearly cheap nor expensive.

FACTOR WEEK	STATEMENTS THROUGH	FIELD COVERAGE	MODEL CONFIDENCE
26 Jul 2026	31 Dec 2025	100%	100%
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	39/100
Value	27/100
Quality	92/100
Momentum	31/100
Growth	36/100

Valuation

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

P/E Price divided by trailing earnings.	16.8x
PRICE / SALES Market value relative to trailing revenue.	4.9x
EV / EBITDA Enterprise value relative to operating cash earnings.	12.3x
FREE-CASH-FLOW YIELD Free cash flow as a share of enterprise value.	6.4%

Business quality

Margins and the return generated on invested capital.

GROSS MARGIN Gross profit retained from each unit of revenue.	67.3%
OPERATING MARGIN Operating profit retained from revenue.	34.9%
FREE-CASH-FLOW MARGIN Free cash flow generated from revenue.	30.7%
RETURN ON INVESTED CAPITAL Operating return generated on invested capital.	31.5%

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.	**11.3%**
EPS GROWTH Latest one-year earnings-per-share growth.	**2.6%**
FREE-CASH-FLOW GROWTH Latest one-year free-cash-flow growth.	**10.0%**
PIOTROSKI F-SCORE Nine-point accounting-strength checklist.	**5/9**

Shareholder return and balance sheet

Cash returned to owners and financial leverage.

DIVIDEND YIELD Cash dividends relative to market value.	**1.0%**
BUYBACK YIELD Net share repurchases relative to market value.	**4.1%**
SHAREHOLDER YIELD Dividend yield plus net buyback yield.	**5.1%**
NET DEBT / EBITDA Balance-sheet debt relative to operating cash earnings.	**-0.4x**

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 ranks strongly versus its universe; growth is moderate; valuation is neither clearly cheap nor expensive.

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

Mixed

SEIC shows mixed options pressure with a 37/100 conviction score, put-call volume ratio of 1.02, expected move of 10.6%, and Sharemaestro trend signal active.

CONVICTION	EXPECTED MOVE	PUT/CALL VOLUME
37/100	10.6%	1.02
Options signal conviction.	Nearest-chain pricing.	Contract volume balance.

Pressure	9
Speculation	17
Volatility	78
Trend agreement	85

Insider activity

4 / 16

4 acquisitions and 16 disposals in the latest 180-day insider tape.

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

News sentiment

56/100

Weighted news tone is neutral across 59 relevant articles.

18 positive · 40 neutral · 1 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

84d

Next report is scheduled for 21 Oct 2026; event risk rises as the date approaches.

OPTIONS EXPECTED MOVE

10.6%

Nearest-chain priced movement where available.

52-WEEK DRAWDOWN

-3.0%

Distance below the 52-week high.

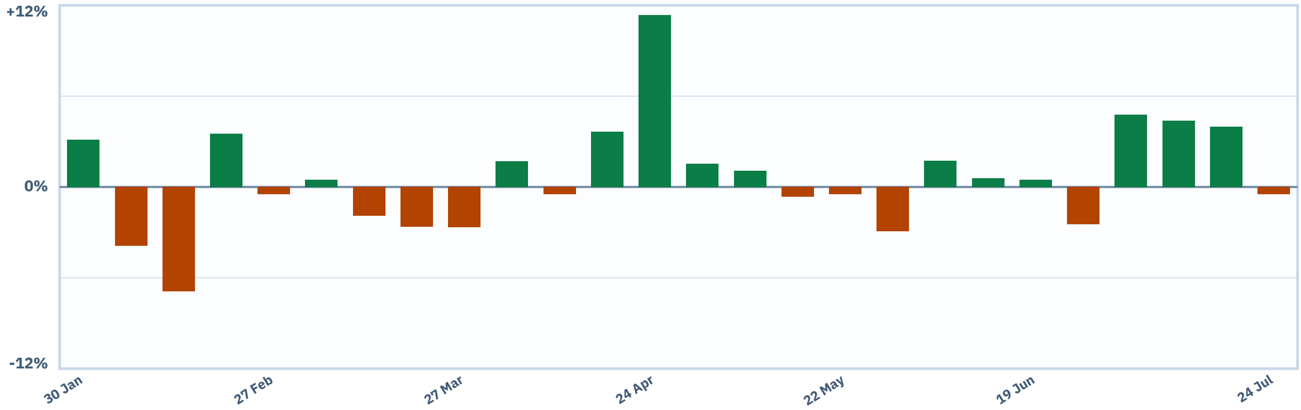
13-WEEK VOLATILITY

2.3%

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

14 of 26

12 weeks finished lower.

BEST WEEK

+11.3%

Week of 24 Apr.

WORST WEEK

-6.9%

Week of 13 Feb.

LATEST WEEK

-0.0%

Week of 24 Jul.

Shape of recent returns

Strong gains	3
Modest gains	11
Flat weeks	-
Modest losses	11
Sharp losses	1

RECENT VOL

2.3%

13-week weekly-return volatility.

BASE VOL

2.9%

52-week weekly-return volatility.

UP/DOWN SPLIT

26/26

Count of positive and negative weeks in the 52-week window.

AVERAGE SKEW

2.3% / -1.8%

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
- / 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
5 / 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	66/100	Trend, activity pressure, participation, and risk combine to a 66/100 tape read.	
Indicator analysis	66/100	Latest 12-week confirmation: trend 12/12, activity pressure 12/12, relative leadership 2/12.	Activity pressure 0.79; 3 reversal markers
Factors	47/100	O'Shaughnessy factor stack blends value, quality, momentum, and confidence.	Buyback Yield rank 14; Small Cap Core rank 73
SVQF	75/100	Value and quality alignment from the Sharemaestro SVQF framework.	Composite rank 180.0 of 726
Patient Capital	Quiet	Activity-pressure buy-signal evidence highlights potential institutional accumulation windows.	No recent buy signal
Options	56/100	SEIC shows mixed options pressure with a 37/100 conviction score, put-call volume ratio of 1.02, expected move of 10.6%, and Sharemaestro trend signal active.	Mixed · Options-market disagreement · Expected move 10.6%
Sentiment	56/100	Weighted news tone is neutral across 59 relevant articles.	Form 4 SEI Investments Company For: 28 July By Investing.com
Insiders	4 / 16	4 acquisitions and 16 disposals in the latest 180-day insider tape.	
Earnings	84d	Next report is scheduled for 21 Oct 2026; event risk rises as the date approaches.	

Current evidence clusters

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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	99.22 USD	-0.0%	85.73 USD	74.53 USD	1.19	7.38	4.9M	On
17 Jul 2026	99.25 USD	4.0%	85.22 USD	74.28 USD	0.95	5.51	4.6M	On
10 Jul 2026	95.45 USD	4.4%	84.66 USD	74.04 USD	0.77	-3.05	3.4M	On
03 Jul 2026	91.43 USD	4.8%	84.21 USD	73.81 USD	0.64	-5.90	2.5M	On
26 Jun 2026	87.25 USD	-2.4%	83.84 USD	73.59 USD	0.62	-9.91	3.4M	On
19 Jun 2026	89.44 USD	0.0%	83.59 USD	73.40 USD	0.64	-12.27	3.5M	On
12 Jun 2026	89.40 USD	0.6%	83.25 USD	73.18 USD	0.70	-10.42	2.6M	On
05 Jun 2026	88.90 USD	1.8%	82.95 USD	72.97 USD	0.79	-9.27	2.9M	On
29 May 2026	87.37 USD	-2.9%	82.72 USD	72.76 USD	0.83	-15.24	2.8M	On
22 May 2026	90.00 USD	-0.1%	82.46 USD	72.56 USD	0.94	-10.69	3.1M	On
15 May 2026	90.05 USD	-0.7%	82.16 USD	72.34 USD	0.93	-10.02	3.2M	On
08 May 2026	90.65 USD	1.1%	81.82 USD	72.11 USD	0.59	-10.13	3.3M	On
01 May 2026	89.69 USD	1.6%	81.47 USD	71.89 USD	0.24	-6.66	5.5M	Off
24 Apr 2026	88.32 USD	11.3%	81.30 USD	71.68 USD	-0.31	-7.02	8.6M	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.

Open the live report · Open the interactive chart · Full disclaimer