

Cisco Systems, Inc. (CSCO) - ANALYST REPORT

Executive Summary with Comprehensive Analysis

\$111.68 **-\$1.79 (-1.58%)** AS OF 2026-08-14

Strategy: Conservative Stop Loss (Fixed ATR-based)

■ QUICK DECISION

Action: HOLD | Confidence: LOW | Signal Strength: 3/7 (last fired 2026-08-12, 2d ago)

EXECUTIVE SUMMARY - Essential Metrics

TECHNICAL METRICS	VALUE	FUNDAMENTAL METRICS	VALUE
Current Price	\$111.68	Market Cap	\$440.2B
Past Win Rate (Backtest)	71.4%	Forward P/E	20.5x
Past Total Return	+33.2%	Analyst Target	\$135.64
RSI / Trend Strength	42 / 17	Upside to Target	+21.5%
MACD Signal	Bullish	Revenue Growth	+17.6%
Profit Factor	1.86	Institutional Own.	83.6%
Position Entry	2025-06-23 @ \$65.62	Analyst Ratings	17 Buy / 8 Hold / 1 Sell
Open Position Past P&L	+70.2%		

■ TECHNICAL ANALYSIS SUMMARY

Indicator	Value	Signal
EMA 20	\$117.20	Bearish
EMA 50	\$114.67	Bearish
RSI (14)	41.8	Neutral range
Trend Strength (ADX)	17.0	Weak/No trend (<20)

■ CONSENSUS HUD

TRIM POSITION +21.5% to \$135.64 on a 2.71:1 reward-to-risk, 6-12 month horizon

SIGNAL STRENGTH 3/7 fired 2d ago	WIN RATE 71% 14 backtested trades	STREET 17/26 analysts rate buy	UPSIDE +21.5% to analyst target	RISK / REWARD 2.71:1 vs. 2x ATR stop
Technical Confluence	3/7 (fired 2d ago)	Backtest	71.4% win rate, +33.2% total return	
Analyst Consensus	17 buy / 8 hold / 1 sell	Target Price	\$135.64 (+21.5%)	
Market Volatility	Beta 1.00	Valuation	20.5x forward P/E	
Revenue Growth	+17.6%	Institutional Own.	83.6%	
Position	Already open — +70.2%	News Sentiment	Slightly Bullish (+2.2/10)	

Action Plan: Lock in gains after +70.2% run. Reduce exposure near resistance. Trail stop on remainder.

■ KEY INSIGHT

The fixed stop strategy has proven effective (Win Rate: 71.4%, Avg Return: +5.1%), but patience is critical. Only enter on confirmed signals with proper risk management. Current technical confluence of 3 does not meet entry threshold of 5 - remain on sidelines. Fundamental backdrop shows 52% earnings growth with 84% institutional ownership, indicating strong conviction from professional investors.

■ INTELLIGENT STOP LOSS STRATEGY

METRIC	VALUE	DETAILS
Current Price	\$111.68	Latest market price
Buy Stop Loss	\$102.85	Conservative 2.0x ATR (7.9% distance)
Position Stop Loss	\$107.27	Adaptive 1.00x ATR (4.0% distance)
ATR (14-day)	\$4.41	Volatility: 4.0% of price
ADX Strength	17.0	Weak/No Trend

Status: Position up +70% - Adaptive strategy adjusts for momentum

ADX: 20-25 = Emerging trend | 25-50 = Strong trend | 50+ = Very strong

■ Strategy Comparison: Conservative vs Adaptive

METRIC	CONSERVATIVE (2.0x ATR)	ADAPTIVE (Dynamic)
Past Win Rate	71%	70%
Past Total Return	+33.2%	+63.8%
Max Drawdown	-11.3%	-9.0%
Total Trades	14	20
Position	OPEN	OPEN

Both strategies analyzed independently. Conservative uses fixed 2.0x ATR stops. Adaptive adjusts stops based on position profit.

For the latest stock analysis, support, resistance and interactive charts, visit [Ultra Stock Analysis Pro](#)

■ ANALYST RATING CHANGES - COMPLETE HISTORY

All recent upgrades, downgrades, and price target changes (last 90 days)

Firm	Action	From → To	Date
HSBC	DOWNGRADE	Buy → Hold	Aug 14, 2026

Analyst Price Targets

Average Target: \$135.64 (+21.5% from current)

High Target: \$165.00 (+47.7%)

Low Target: \$115.00 (+3.0%)

Current Price: \$111.68

RISK HUD - Deep Dive Assessment

Five risk axes scored LOW / MODERATE / HIGH, then the mitigation that follows from them.

CONTAINED RISK no single axis reads high

MARKET MODERATE beta 1.00	VOLATILITY MODERATE ATR 4.0% of price	VALUATION LOW fwd P/E 20.5x	EVENT LOW earnings in 90d	TECHNICAL LOW RSI 42
Mitigation - Stop	2-3x ATR = \$8.83 - \$13.24 below entry (7.9% at 2x)	Mitigation - Sizing	standard position size is supportable	
52-Week Range	\$65.75 - \$130.37, now \$111.68	Next Earnings	Nov 12, 2026 (90d away)	
Short Interest	1.7% of float - normal short activity	Sector Exposure	Technology - cycle and regulatory risk specific to the group	
Backtest Edge	71.4% win rate (10W / 4L), 1.86x profit factor	Win vs. Loss Size	avg win 9.1% vs. avg loss -4.9%	
Current Setup	3/7 (fired 2d ago) - moderate	Company-Specific	Competition, Market conditions, Regulatory changes	

BUY-SIDE HUD - Portfolio Management

How much to own, what the historical edge is, and whether the position can be traded at size.

OVERWEIGHT +21.5% to the \$135.64 analyst target against a 7.9% stop - favorable risk-adjusted return

UPSIDE +21.5% to analyst target	RISK / REWARD 2.71:1 vs. 2x ATR stop	WIN RATE 71% 14 backtested trades	PROFIT FACTOR 1.86x avg trade +5.1%	POSITION +70.2% open position
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Signal Strength	3/7 (fired 2d ago) - moderate setup	RSI / ADX	42 / 17.0 - weak/no trend (<20)
Stop Zone (2-3x ATR)	\$8.83 - \$13.24 below entry	Next Catalyst	Nov 12, 2026 earnings
Avg Volume	24.6M/day - moderately liquid	Execution Risk	Low at institutional size
Market Cap	\$440.2B - large cap	Beta	1.00 - market-like volatility
Institutional Own.	83.6% - largest: Blackrock Inc.	Short Interest	1.7% of float - moderate

SELL-SIDE HUD - Investment Research

Cisco Systems, Inc. - Technology / Communication Equipment. What the business is worth and where the Street stands.

STRONG GROWTH positive operating leverage - revenue and earnings both accelerating

FORWARD P/E 20.5x reasonable multiple	PEG 1.22 growth-adjusted P/E	REVENUE GROWTH +18% year over year	EPS GROWTH +64% next fiscal year	OPERATING MARGIN 28% profitability
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Analyst Consensus	Strong Buy - 17B / 8H / 1S across 26 analysts	Target Range	\$115.00 - \$165.00, avg \$135.64 (+21.5%)
Trailing P/E	33.5x	Price / Sales	6.95x - premium
Price / Book	9.01x	Enterprise Value	\$454.6B (7.18x revenue)
Revenue (TTM)	\$63.3B	Free Cash Flow	\$11.6B
Earnings Growth	+52.0%	Institutional Own.	83.6% - very high confidence
Key Competitors	Various industry players	Market Share	0% US / 0% global - competitive player
Moat	Market position, Technology, Brand	Key Products	Core products and services

■ 7-DAY NEWS SENTIMENT ANALYSIS

Market Sentiment from Recent Financial News

METRIC	VALUE	ANALYSIS
Overall Score	+2.2 / 10	Slightly Bullish
Articles Analyzed	6	Last 7 days (top 5 shown per category)
Bullish Articles	2 (33%)	Positive sentiment
Bearish Articles	0 (0%)	Negative sentiment
Neutral Articles	4 (67%)	Mixed/Neutral tone

■ TOP BULLISH HEADLINES

1. Cisco rating cut at HSBC as analyst sees a lack of catalysts (Investing.com, Aug 14)

Investing.com -- HSBC downgraded Cisco Systems (NASDAQ: CSCO) to Hold from Buy and cut its price target for the stock to \$120 from \$137 in a note on F...

Source: <https://finance.yahoo.com/markets/stocks/articles/cisco-rating-cut-hsbc-analyst->

2. CSCO Q2 Deep Dive: AI Networking Surge Drives Growth, Market Eyes Margins and Demand Durability (StockStory, Aug 15)

Networking technology giant Cisco (NASDAQ:CSCO) reported Q2 CY2026 results exceeding the market's revenue expectations, with sales up 17.6% year on ye...

Source: <https://finance.yahoo.com/markets/stocks/articles/cSCO-q2-deep-dive-ai-024500134>

■ SENTIMENT INTERPRETATION

The news sentiment is **moderately bullish**, showing generally positive coverage with some caution. Market perception appears favorable but not overwhelmingly positive. This neutral-to-positive sentiment suggests steady conditions without extreme optimism.

REFERENCE: APPENDIX A - Complete Technical Indicators

Comprehensive Technical Data for Quantitative Analysis

Indicator	Value	Interpretation
Current Price	\$111.68	as of 2026-08-14
Volume	29.4M	avg 24.6M/day
EMA 20	\$117.20	Short-term trend
EMA 50	\$114.67	Medium-term trend
EMA 200	\$95.77	Long-term trend
Relative Strength	41.8	Neutral range
MACD	0.68	Bullish
MACD Signal	1.04	Signal line
MACD Histogram	-0.36	Bearish
Volatility (ATR 14)	\$4.41	4.0% of price
Trend Strength (ADX)	17.0	Weak/No trend (<20)
+DI	18.0	Positive directional movement
-DI	32.2	Negative directional movement
Stochastic %K	39.9	Neutral
Stochastic %D	60.0	Neutral
Bollinger Upper	\$125.03	Upper volatility band
Bollinger Middle	\$116.38	Moving average
Bollinger Lower	\$107.74	Lower volatility band
Band Position	22.8%	0% = lower band, 100% = upper
VWAP	\$111.81	Volume-weighted average

REFERENCE: APPENDIX B - Complete Fundamental Metrics

Comprehensive Fundamental Data for Financial Analysis

Category	Metric	Value	Interpretation
Valuation	Market Cap	\$440.2B	Total market value
Valuation	Enterprise Value	\$454.6B	Total company value
Valuation	Forward P/E	20.5x	Price to forward earnings
Valuation	Trailing P/E	33.5x	Price to trailing earnings
Valuation	PEG Ratio	1.22	P/E relative to growth
Valuation	Price/Sales	6.95x	Market cap to revenue
Valuation	Price/Book	9.01x	Price to book value
Valuation	EV/Revenue	7.18x	Enterprise value to revenue
Valuation	EV/EBITDA	24.4x	Enterprise value to EBITDA
Performance	Revenue (TTM)	\$63.3B	Trailing 12-month revenue
Performance	Revenue Growth	+17.6%	Year-over-year growth
Performance	Earnings Growth	+52.0%	Earnings growth rate
Performance	EPS Growth (Next Yr)	+63.9%	Forward EPS growth estimate
Performance	Gross Profit	\$40.9B	Revenue minus COGS
Performance	Operating Income	\$14.2B	EBIT
Performance	Net Income	\$13.3B	Bottom line profit
Performance	Free Cash Flow	\$11.6B	Cash after capex
Performance	Operating Cash Flow	\$14.2B	Cash from operations
Profitability	Gross Margin	64.6%	Gross profit margin
Profitability	Operating Margin	27.7%	Operating efficiency
Profitability	Profit Margin	21.0%	Net margin
Profitability	ROE	27.3%	Return on equity
Profitability	ROA	8.0%	Return on assets
Profitability	ROIC	N/A	Return on invested capital
Balance Sheet	Total Assets	\$0.0B	Total assets
Balance Sheet	Total Liabilities	\$0.0B	Total liabilities
Balance Sheet	Total Debt	\$29.5B	Total debt outstanding
Balance Sheet	Cash & Equivalents	\$15.9B	Liquid assets
Balance Sheet	Book Value/Share	\$12.40	Net worth per share
Balance Sheet	Current Ratio	0.93	Current assets/liabilities
Balance Sheet	Quick Ratio	0.65	Liquid assets/liabilities
Balance Sheet	Debt/Equity	0.59	Leverage ratio
Market	Beta	1.00	Market correlation
Market	52-Week High	\$130.37	Annual high
Market	52-Week Low	\$65.75	Annual low

Market	Avg Volume	24.6M	Average daily volume
Market	Shares Outstanding	3.9B	Total shares
Market	Float	3.9B	Tradeable shares
Market	Short Interest	1.7%	Shares sold short
Market	Institutional Own.	83.6%	Institution held
Analysts	Coverage Count	22	Number of analysts
Analysts	Average Rating	1.8	1=Strong Buy, 5=Sell
Analysts	Buy/Hold/Sell	17/8/1	Rating distribution
Analysts	Target Price	\$135.64	Average price target
Analysts	Target High	\$165.00	Highest target
Analysts	Target Low	\$115.00	Lowest target
Other	Next Earnings	Nov 12, 2026	Earnings report date
Other	Dividend Yield	1.50%	Annual dividend rate
Other	Ex-Dividend Date	1790899200	Next ex-div date

REFERENCE: APPENDIX C - Complete Trade History

Detailed Backtesting Results and Trade Log

Entry	Exit	Type	Entry \$	Exit \$	Past P&L %	Past P&L \$
2019-10-02	2019-12-09	CONFLUENCE	\$37.99	\$36.10	-5.0%	\$-199
2019-12-31	2020-01-17	GOLDEN_CROSS	\$39.43	\$40.60	+3.0%	\$+193
2020-04-29	2020-08-18	GOLDEN_CROSS	\$36.24	\$35.38	-2.4%	\$-63
2020-11-23	2021-04-05	GOLDEN_CROSS	\$35.41	\$45.26	+27.8%	\$+1152
2021-05-07	2021-10-04	CONFLUENCE	\$46.14	\$47.47	+2.9%	\$+191
2021-10-06	2022-01-28	CONFLUENCE	\$47.22	\$48.97	+3.7%	\$+217
2022-07-05	2022-10-28	CONFLUENCE	\$37.54	\$41.21	+9.8%	\$+422
2022-11-01	2023-04-26	GOLDEN_CROSS	\$41.05	\$42.67	+4.0%	\$+210
2023-05-18	2023-10-23	CONFLUENCE	\$44.20	\$48.58	+9.9%	\$+666
2023-11-16	2024-02-13	CONFLUENCE	\$44.70	\$46.55	+4.1%	\$+211
2024-07-17	2024-08-06	GOLDEN_CROSS	\$46.27	\$43.06	-6.9%	\$-567
2024-08-19	2024-11-11	GOLDEN_CROSS	\$47.66	\$56.33	+18.2%	\$+946
2025-02-13	2025-03-14	CONFLUENCE	\$61.76	\$58.53	-5.2%	\$-352
2025-05-14	2025-06-09	GOLDEN_CROSS	\$59.69	\$64.18	+7.5%	\$+453
2025-06-23	OPEN	CONFLUENCE	\$65.62	OPEN	+70.2%	\$+5481

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Next Earnings: Nov 12, 2026

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