



# Balfour Capital Group Apple Inc.

Apple Inc. is a leading American multinational technology company that designs, manufactures, and markets a range of consumer electronics, software, and services. Its flagship products include the iPhone, Mac computers, iPad tablets, Apple Watch, and AirPods. The company also offers services such as the App Store, Apple Music, iCloud, Apple TV+, and Apple Pay. Apple is renowned for its seamless integration of hardware and software, delivering a cohesive user experience across its ecosystem.

## 1. Top 5 Competitors

Apple faces competition across various segments:

- Samsung Electronics: A major rival in smartphones, tablets, and wearables.
- Microsoft: Competes in personal computing, cloud services, and productivity software.
- Google (Alphabet Inc.): Rival in mobile operating systems (Android), cloud services, and hardware.
- Dell Technologies: Competes in personal computers and enterprise solutions.
- Lenovo: A significant player in the global PC and tablet markets.

## 2. Largest Institutional Shareholders

As of the latest filings:

- The Vanguard Group: Holds approximately 9.33% of Apple's shares.
- BlackRock Advisors LLC: Owns about 5.80%.
- State Street Corporation: Holds 3.97%.
- Geode Capital Management LLC: Possesses 2.33%.
- Fidelity Management & Research Co. LLC: Also among the top institutional investors.



# Balfour Capital Group Apple Inc.

## 3. Management Team

Apple's executive leadership includes:

- Tim Cook: Chief Executive Officer (CEO)
- Jeff Williams: Chief Operating Officer (COO)
- Luca Maestri: Chief Financial Officer (CFO)
- Carol Surface: Chief People Officer (CPO)
- Katherine Adams: Senior Vice President and General Counsel
- Eddy Cue: Senior Vice President of Services
- Craig Federighi: Senior Vice President of Software Engineering
- John Giannandrea: Senior Vice President of Machine Learning and AI Strategy

## 4. Revenue

For the twelve months ending March 31, 2025, Apple reported revenue of \$400.37 billion, marking a 4.91% increase year-over-year.

## 5. Institutions with Buy Recommendations:

Several financial institutions have issued buy ratings for Apple stock:

- JPMorgan: Reaffirmed its Buy rating in May 2025.
- Daiwa: Adjusted its price target to \$240 from \$270, maintaining an Outperform rating.

## 6. Analyst Sentiment Summary

Analyst sentiment towards Apple remains positive:

- TipRanks: Reports 68 Buy ratings, 20 Hold ratings, and 12 Sell ratings, with an average price target of \$228.22.
- Danelfin AI: Assigns Apple an AI Score of 8/10, indicating a strong probability of outperforming the market in the next three months



# Balfour Capital Group Apple Inc.

## 7. Insider Buying and Selling (Last 24 Months)

Over the past 24 months, Apple insiders have sold a total of 1,848,602 shares, amounting to approximately \$366.88 million. Notable transactions include:

- Tim Cook (CEO): Sold shares worth approximately \$132.82 million.
- Jeff Williams (COO): Sold shares valued at around \$69.04 million.
- Luca Maestri (CFO): Sold shares totaling about \$34.05 million.
- Katherine Adams (SVP & General Counsel): Sold shares worth approximately \$66.44 million.
- Deirdre O'Brien (SVP of Retail + People): Sold shares valued at around \$23.28 million.

There have been no reported insider purchases during this period.

