



Balfour Capital Group Ducommun Incorporated

Founded in 1849, Ducommun Incorporated is a leading provider of engineering and manufacturing services for the aerospace, defense, and industrial sectors. The company specializes in two core areas:

- **Electronic Systems:** Designs and manufactures complex electronic and electromechanical systems for military and commercial aircraft, space programs, and industrial applications.
- **Structural Systems:** Produces large, complex structural components and assemblies for aerospace and defense platforms.

Ducommun's products are integral to various platforms, including commercial aircraft, military aircraft, space launch vehicles, and industrial equipment.

1. Top 5 Competitors

Ducommun operates in a competitive landscape with several key players:

- **Astronics Corporation (ATRO):** Provides advanced technologies for the global aerospace, defense, and other mission-critical industries.
- **Curtiss-Wright Corporation (CW):** Offers highly engineered products and services to the aerospace, defense, and energy markets.
- **Hexcel Corporation (HXL):** Specializes in advanced composites for commercial aerospace, space, and defense applications.
- **Spirit AeroSystems Holdings, Inc. (SPR):** Designs and manufactures aerostructures for commercial and defense aircraft.
- **National Presto Industries, Inc. (NPK):** Engages in the production of defense products, housewares, and small appliances.

2. Largest Institutional Shareholders

As of the latest filings, the largest institutional shareholders of Ducommun include:

- **Dimensional Fund Advisors LP:** Holds approximately \$65.12 million in shares.
- **Paradigm Capital Management Inc. NY:** Approximately \$59.03 million.
- **Vanguard Group Inc.:** Around \$44.53 million.
- **Gamco Investors, Inc. ET AL:** Approximately \$34.14 million.
- **State Street Corporation:** Holds about \$31.74 million.



Balfour Capital Group Ducommun Incorporated

3. Management Team

Ducommun's executive leadership includes:

- Stephen G. Oswald: Chairman, President, and CEO.
- Suman B. Mookerji: Senior Vice President and Chief Financial Officer.
- Rajiv A. Tata: Vice President, General Counsel, and Corporate Secretary.
- Laureen S. Gonzalez: Vice President and Chief Human Resources Officer.

4. Revenue

For the fiscal year ending December 31, 2024, Ducommun reported:

- Annual Revenue: \$786.55 million, representing a 3.9% increase year-over-year.
- Q1 2025 Revenue: \$194.11 million, a 1.71% increase compared to Q1 2024.

5. Institutions with Buy Recommendations:

Analyst sentiment towards Ducommun is generally positive:

- Consensus Rating: Strong Buy.
- Average Price Target: \$75.00, indicating a potential upside of approximately 2.31% from the current price.

Notable institutions with buy recommendations include: [craft.co](https://www.craft.co)

- Truist Securities: Set a price target of \$70.00.
- RBC Capital Markets: Adjusted price target to \$56.00, maintaining an "Outperform" rating.



Balfour Capital Group Ducommun Incorporated

6. Analyst Sentiment Summary

Analysts have a favorable outlook on Ducommun, citing:

- Strong Performance: Consistent revenue growth and profitability.
- Strategic Positioning: Well-positioned in the aerospace and defense sectors with a diversified product portfolio.
- Growth Potential: Opportunities in commercial aerospace recovery and defense spending.

7. Insider Buying and Selling (Last 24 Months)

Over the past 24 months, insider trading activity includes:

- Shares Bought: Approximately 148,987 shares.
- Shares Sold: Approximately 94,791 shares.

Notable transactions:

- Stephen G. Oswald (CEO): Sold 3,100 shares at \$67.93 on November 12, 2024.
- Stephen G. Oswald (CEO): Sold 1,200 shares at \$66.32 on September 20, 2024.