



Balfour Capital Group The Charles Schwab Corporation

The Charles Schwab Corporation is a leading U.S.-based financial services firm offering a broad range of services including brokerage, banking, wealth management, and financial advisory services. Its subsidiaries include Charles Schwab & Co., Inc., which provides investment services and products, and Charles Schwab Bank, SSB, offering deposit and lending services.

1. Top 5 Competitors

Charles Schwab's primary competitors in the financial services sector include:

1. Fidelity Investments
2. Vanguard Group
3. Goldman Sachs
4. BlackRock
5. Edward Jones

These firms compete with Schwab across various services such as brokerage, asset management, and financial advisory.

2. Largest Institutional Shareholders

As of the latest data, the largest institutional shareholders of Charles Schwab include:

- Toronto-Dominion Bank – \$13.73 billion
- Vanguard Group Inc. – \$11.62 billion
- Dodge & Cox – \$6.95 billion
- T. Rowe Price Associates Inc. – \$6.42 billion
- BlackRock Inc. – \$5.42 billion

3. Management Team

Key members of Charles Schwab's executive leadership include:

- Charles R. Schwab – Co-Chairman
- Walter W. Bettinger II – Co-Chairman
- Richard A. Wurster – President & CEO
- Jessica Seidlitz – Chief Operating Officer & Chief Financial Officer
- Omar Aguilar, Ph.D. – CEO & Chief Investment Officer, Schwab Asset Management



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4. Revenue

In the first quarter of 2025, Charles Schwab reported record net revenues of \$5.6 billion, marking an 18% year-over-year increase. The company's trailing twelve-month (TTM) revenue stands at approximately \$20.46 billion.

5. Institutions with Buy Recommendations:

Analysts from institutions such as Morgan Stanley have issued "Overweight" ratings for Charles Schwab, indicating a positive outlook on the stock.

6. Analyst Sentiment Summary

Analyst sentiment towards Charles Schwab is generally positive. The average recommendation is "Overweight," with an average target price of \$89.79. The consensus reflects confidence in the company's growth prospects and financial performance.

7. Insider Buying and Selling (Last 24 Months)

Over the past 24 months, Charles Schwab insiders have purchased a total of 35,833 shares, amounting to approximately \$2.33 million. Conversely, insider sales have been more substantial, with 81 sell transactions in the past 12 months alone.