

Title:

An Analysis Of Lexmark

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Summary:

In 2005, Berkshire Hathaway bought about a million shares of Lexmark. I haven't followed this

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Lexmark, LXX, Lexmark (LXX), (LXX), printer, printers, stock, stock market, investing, investo

Article Body:

In 2005, Berkshire Hathaway bought about a million shares of Lexmark. I haven't followed this

The commentary on Lexmark has been almost uniformly negative. Even many value investors have a

Most of the negative comments about Lexmark have focused on the consumer segment. Yet, more th

Even Lexmark's competitors have to concede the fact that Lexmark knows printing better than an

Lexmark has the much stronger competitive position. For years to come, it will be launching th

Lexmark isn't interested in selling hardware. It's interested in selling ink. Now that there i

Generic ink cartridges are the biggest threat to the high margin printing business. However, I

There is also some concern that Dell could always move away from using Lexmark printers. Let t

As far as I can tell, Lexmark's management is excellent. They understand the printer business

Within the printer business, there is a real danger of ferocious price competition. However, I

That's my assessment of Lexmark on qualitative grounds. How does the stock look quantitatively

The stock is selling for about 15 times earnings and 10 times cash flow. Right now, a dollar o

For the last ten years, Lexmark's return on equity has not fallen below 20%. During the same p

I wouldn't be surprised to see Lexmark's ROE and free cash flow fall substantially in the next

The important estimate is the 8 ~ 10% free cash flow margin. That's the best way to value Lexm

I never do a discounted free cash flow analysis on this blog, because I feel the variables tha

It doesn't. I'm looking at this company well beyond that point, and I like what I see. Lexmark

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