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KMB

Analyze

KMB

Kimberly-Clark Corporation



Business Overview

Kimberly-Clark (KMB) is a global leader in the manufacturing and marketing of a wide range of products made from natural or synthetic fibers.

The company operates through three primary segments: **Personal Care**, **Consumer Tissue**, and **K-C Professional**. It owns iconic global brands including **Huggies**, **Kleenex**, **Scott**, **Kotex**, **Cottonelle**, **Poise**, and **Depend**.

Sector: Consumer Defensive (Consumer Staples).

Industry: Household & Personal Products.

Market Position and Strategy

KMB holds the **No. 1 or No. 2 share position** in approximately 70 countries.

The company is currently executing its **"Powering Care"** strategy, focused on innovation-led growth, productivity gains, and a major organizational restructuring into three powerhouse segments to drive efficiency.

A transformative development is the pending acquisition of **Kenvue (KVUE)**, which is expected to create a global health and wellness giant with over \$32 billion in combined revenue.

Equity & Buyback Strategy

Shareholder's Equity and Balance Sheet Deep Dive

Treasury Stock & Buybacks: KMB has a long history of aggressive share repurchases. In 2024, the company repurchased approximately **7.2 million shares** at a cost of **\$1.0 billion**. This strategy is aimed at offsetting dilution and boosting Earnings Per Share (EPS).

Equity Structure: The balance sheet often shows a low or even negative total equity value relative to its market cap because of the massive amount of **Treasury Stock** (accumulated cost of shares bought back) which is a contra-equity account. As of recent filings, treasury stock sat at roughly **-\$6 billion**.

Capital Return Strategy: The company is a committed **Dividend Aristocrat**, having increased its dividend for **53 consecutive years**. In 2024, it returned a total of **\$2.6 billion** to shareholders through a combination of dividends and buybacks.

Leverage Concerns: Total debt remains high at approximately **\$7.1 billion - \$7.4 billion**. While interest coverage is healthy (around 11x), the high debt-to-equity ratio (exceeding 400%) reflects a highly leveraged capital structure that prioritizes shareholder returns over balance sheet de-leveraging.

 Income & Options Strategy Analysis

Income Investor Evaluation

Dividend Reliability: KMB is exceptionally reliable for income, boasting a 50+ year track record of growth. However, the **payout ratio** is often high (typically 70-80%), leaving little room for error if earnings growth stalls.

Growth vs. Yield: While the current yield (approx. **5.1%-5.3%**) is attractive, the organic revenue growth is historically low (low single digits), meaning investors are largely reliant on the dividend rather than price appreciation.

Skepticism & Risks: A major red flag is the **stagnant top-line growth**. KMB often relies on price increases to drive revenue, which can eventually lead to consumer trade-down to private labels. Additionally, input cost volatility (pulp and energy) can significantly squeeze margins.

Options Strategy Suitability

Volatility Profile: KMB exhibits very low **Beta (approx. 0.30 - 0.40)** and low implied volatility (IV). This makes it a "safe" candidate for selling put spreads, but the **premiums are thin**.

Strategy Execution:

Put Spreads: Suitable for conservative investors looking for a high probability of profit with limited upside. The stock rarely experiences massive gap-downs.

Assignment & Covered Calls: If assigned, the high dividend yield provides a cushion while waiting to sell calls. However, because the stock price can remain range-bound for years, capital may be tied up with low appreciation potential.

Liquidity: Options liquidity is sufficient for retail traders, but spreads can be wider than those of high-volume tech stocks. It is not ideal for aggressive premium hunting.

INCOME SUITABILITY SCORE

Based on dividend reliability, options liquidity, and historical market perception.

 **4/5**

 Investment Thesis

 Strengths & Opportunities

- Dividend Aristocrat with 53 consecutive years of dividend increases.
- Recession-resistant product portfolio (diapers, tissues, feminine care).
- Strategic acquisition of Kenvue provides a new growth engine in consumer health.
- Strong pricing power and successful productivity initiatives improving margins.

 Risks & Weaknesses

- High debt-to-equity ratio and leveraged balance sheet.
- Slow organic volume growth; heavily reliant on pricing and cost-cutting.
- Exposure to volatile commodity prices (pulp, polymer, energy).
- Significant currency translation risks due to global operations.
- Private label competition poses a threat in the tissue and diaper categories.

Low volatility (Beta ~0.30) provides portfolio stability during market downturns.

Competitor Comparison

COMPANY	TICKER	MARKET CAP	P/E RATIO	REVENUE
Kimberly-Clark Corporation	KMB	\$32.49B	16.25	N/A
Procter & Gamble	PG	\$333.01B	21.6	\$85.26B
Colgate-Palmolive	CL	\$77.92B	31.4	\$19.46B
Church & Dwight	CHD	\$24.01B	32.6	\$5.87B

Key Financial Metrics

\$ MARKET CAP

\$32.49B

EMPLOYEES

36,000

P/E RATIO

16.25

DIV. YIELD

5.13%

CURRENT RATIO

0.75

QUICK RATIO

0.37

DEBT/EQUITY

4.38

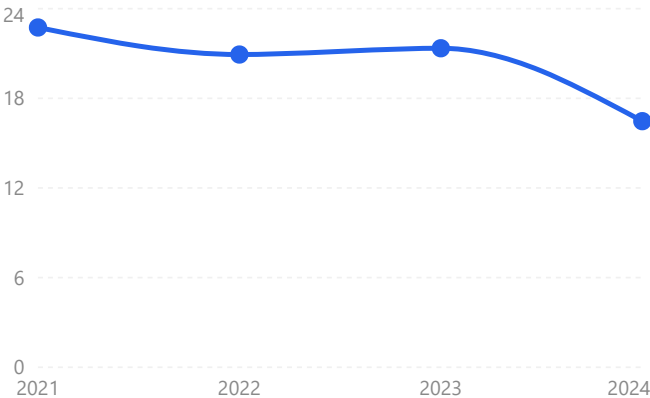
BETA

0.30

52-WEEK RANGE

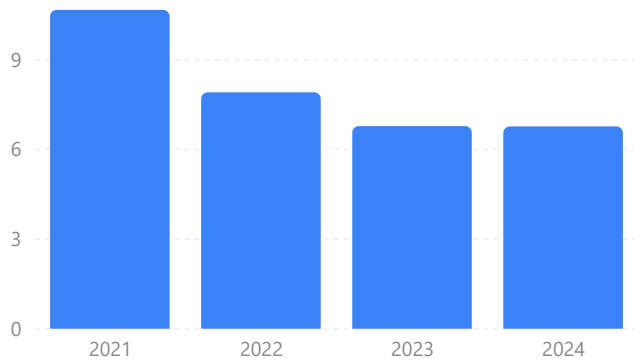
\$92.42 - \$144.31

P/E RATIO TREND

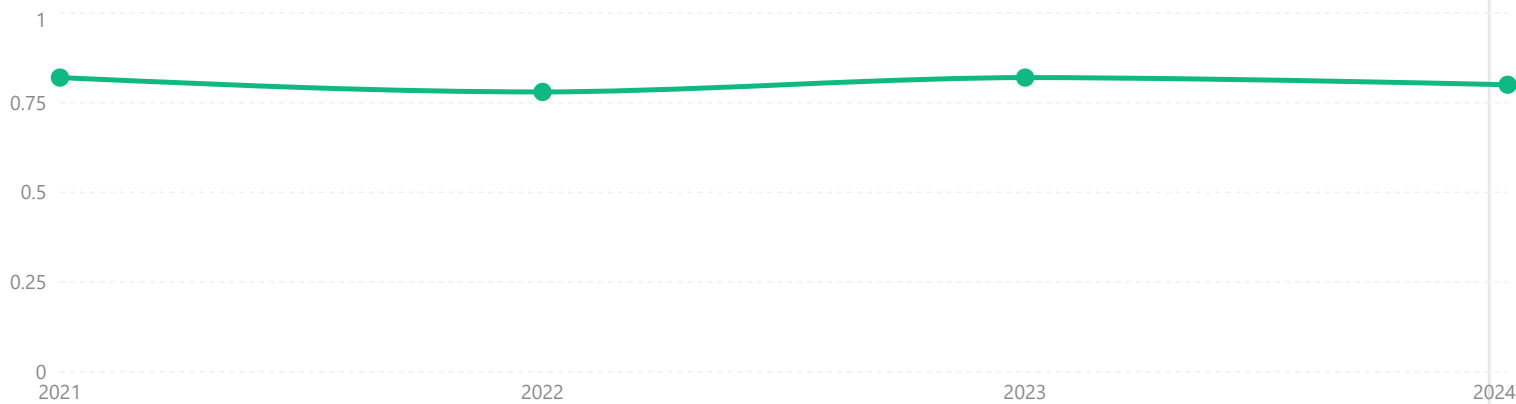


DEBT TO EQUITY TREND





CURRENT RATIO TREND



Latest News & AI Summaries

Kimberly-Clark to Acquire Kenvue in \$48.7 Billion Transformative Deal

KMB announced a definitive agreement to acquire Kenvue (formerly J&J's consumer health unit), aiming to create a global health leader with \$32 billion in pro-forma sales.

[Read Article](#)  [KENVUE.COM](#)

Kimberly-Clark Reports Strong 2024 Results and 53rd Dividend Hike

The company exceeded growth algorithms in 2024 with an 11% increase in adjusted EPS and announced its 53rd consecutive annual dividend increase.

[Read Article](#)  [KIMBERLY-CLARK.COM](#)

Restructuring Plan: KMB Rewires into Three Business Segments

As part of its 'Powering Care' strategy, KMB successfully reorganized into three segments (North America, International, Professional) to drive \$3 billion in productivity savings.

[Read Article](#)  [MEDIAROOM.COM](#)

Ask a Follow-up Question

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📈 Recommended S&P 500 Tickers (Income & Options)

TICKER	COMPANY	SECTOR	REASONING
PG	Procter & Gamble	Consumer Staples	Dominant market leader with high options liquidity and a long history of dividend growth.
KO	Coca-Cola Company	Consumer Staples	Consistent cash flows and low volatility make it ideal for selling put spreads for income.
JNJ	Johnson & Johnson	Healthcare	AAA-rated balance sheet and stable dividends; excellent for conservative covered call strategies.
PEP	PepsiCo, Inc.	Consumer Staples	Diversified food and beverage giant with reliable dividend growth and moderate options premium.
CVX	Chevron Corporation	Energy	Strong dividend yield and higher IV than staples, offering better premiums for options sellers.
VZ	Verizon Communications	Communication Services	High dividend yield and range-bound price action favor income-generation through put spreads.

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