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PG

Analyze

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The Procter & Gamble Company



Business Description The Procter & Gamble Company (P&G) is a global leader in fast-moving consumer goods, founded in 1837. The company operates through five key segments: **Fabric & Home Care** (e.g., Tide, Ariel, Dawn), **Baby, Feminine & Family Care** (e.g., Pampers, Always, Bounty), **Beauty** (e.g., Olay, Pantene, Head & Shoulders), **Health Care** (e.g., Oral-B, Crest, Vicks), and **Grooming** (e.g., Gillette, Venus). P&G owns 25 'billion-dollar brands' and maintains a dominant market share in nearly all its categories. ### **Sector and Industry** **Sector:** Consumer Defensive (Consumer Staples). **Industry:** Household & Personal Products. ### **Market Standing** P&G is often viewed as a barometer for global consumer spending. Its business model relies on 'superiority' in product performance and branding, allowing it to maintain premium pricing even during inflationary periods. However, recent performance has shown a deceleration in organic sales growth, particularly in the **Greater China** region and other enterprise markets.

Equity & Buyback Strategy

Shareholder's Equity & Balance Sheet Analysis Based on the latest SEC filings for fiscal year 2025, P&G maintains a highly aggressive capital return strategy. * **Treasury Stock:** P&G's balance sheet is notable for its massive **Treasury Stock** balance, which represents over **\$100 billion** in repurchased shares. This acts as a 'contra-equity' account, significantly reducing total shareholder equity to approximately **\$52 billion**. * **Stock Buybacks:** In fiscal 2025, the company returned **\$6.5 billion** to shareholders via direct share repurchases. This strategy is designed to boost **Earnings Per Share (EPS)** by reducing the float, even when net income growth is modest. * **Capital Strategy:** The company prioritizes a 'balanced' return model, spending more on dividends (\$9.9 billion) than buybacks. This suggests a commitment to long-term income seekers over short-term price manipulation. * **Red Flag:** The **Current Ratio** is persistently below **1.0** (recently ~0.73), which is a common but risky characteristic of consumer giants that rely on consistent cash flow to fund short-term liabilities.

Income & Options Strategy Analysis

Income & Options Strategy Evaluation **Skeptical Income Analysis:** While P&G is a 'Dividend King' with **69 consecutive years** of increases, the current yield of **~3.0%** is relatively low compared to recent historical averages and alternative risk-free rates. **Risks include:** 1) **Valuation Overstretch:** A P/E ratio over 21 for a company growing organic sales at only 1-2% suggests the stock is priced for perfection. 2) **Revenue Stagnation:** Recent misses in total revenue highlight a struggle to find new volume growth outside of price hikes. ### Options Strategy Suitability * **Put Spreads for Premium:** P&G is an excellent candidate for selling put spreads due to its **Beta of 0.41**, indicating extreme price stability relative to the S&P 500. However, this low volatility means **option premiums are thin**, requiring larger positions or closer-to-the-money strikes to generate meaningful income. * **Liquidity & Assignment:** Options liquidity is **superior**, with tight bid-ask spreads. If assigned, the investor acquires a world-class asset with minimal bankruptcy risk. * **Covered Calls:** Selling covered calls is a viable strategy to enhance the ~3% dividend yield, but the low volatility limits the potential for large 'volatility harvests.' **Caution:** The main 'red flag' is the opportunity cost; the stock can remain flat for years, and the low premiums may not compensate for the capital tied up if the broader market is rallying.

INCOME SUITABILITY SCORE

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

 4/5

Investment Thesis

Strengths & Opportunities

- Dividend King status with 69 years of consecutive dividend growth.
- Recession-resistant portfolio of 25 billion-dollar household brands.
- Extremely low beta (0.41) provides significant downside protection during market volatility.
- Strong free cash flow productivity (consistently above 90%).
- Dominant pricing power in the Fabric and Home Care segments.

Risks & Weaknesses

- Sluggish organic sales growth (decelerated to 1% in recent quarters).
- Significant headwinds in the Greater China market impacting the Beauty segment.
- High valuation (P/E ~21) relative to its low single-digit revenue growth trajectory.
- Persistently low current ratio (below 1.0) indicates tight liquidity management.
- Currency and commodity price fluctuations frequently impact net earnings.

Competitor Comparison

COMPANY	TICKER	MARKET CAP	P/E RATIO	REVENUE
The Procter & Gamble Company	PG	\$337.41 Billion	21.19	N/A
Unilever PLC	UL	\$131.5 Billion	18.2	\$65.4 Billion

COMPANY	TICKER	MARKET CAP	P/E RATIO	REVENUE
Colgate-Palmolive Company	CL	\$76.8 Billion	30.4	\$19.8 Billion
Kimberly-Clark Corporation	KMB	\$47.2 Billion	18.9	\$20.4 Billion

 Key Financial Metrics

\$

MARKET CAP

\$337.41 Billion

👤

EMPLOYEES

109,000

🕒

P/E RATIO

21.19

📈

DIV. YIELD

3.04%

📊

CURRENT RATIO

0.73

📊

QUICK RATIO

0.47

📊

DEBT/EQUITY

0.69

📈

BETA

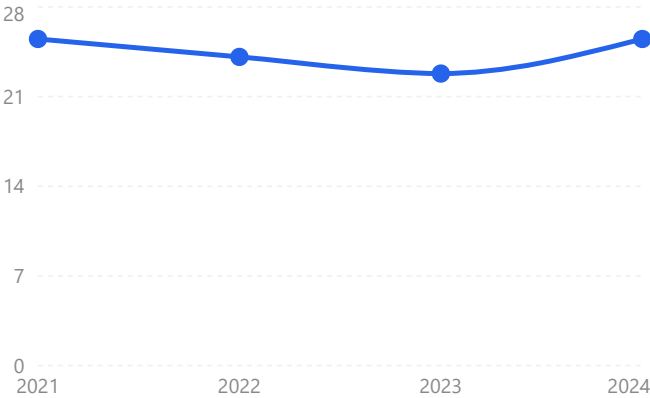
0.41

📈

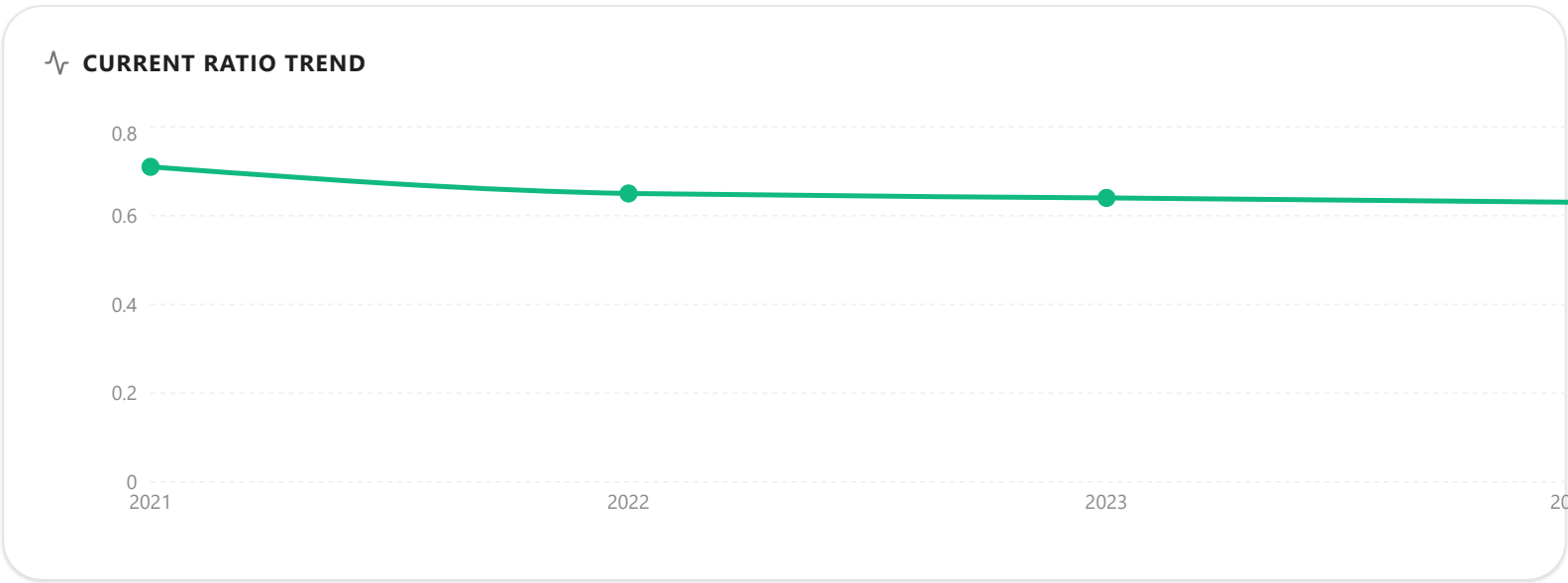
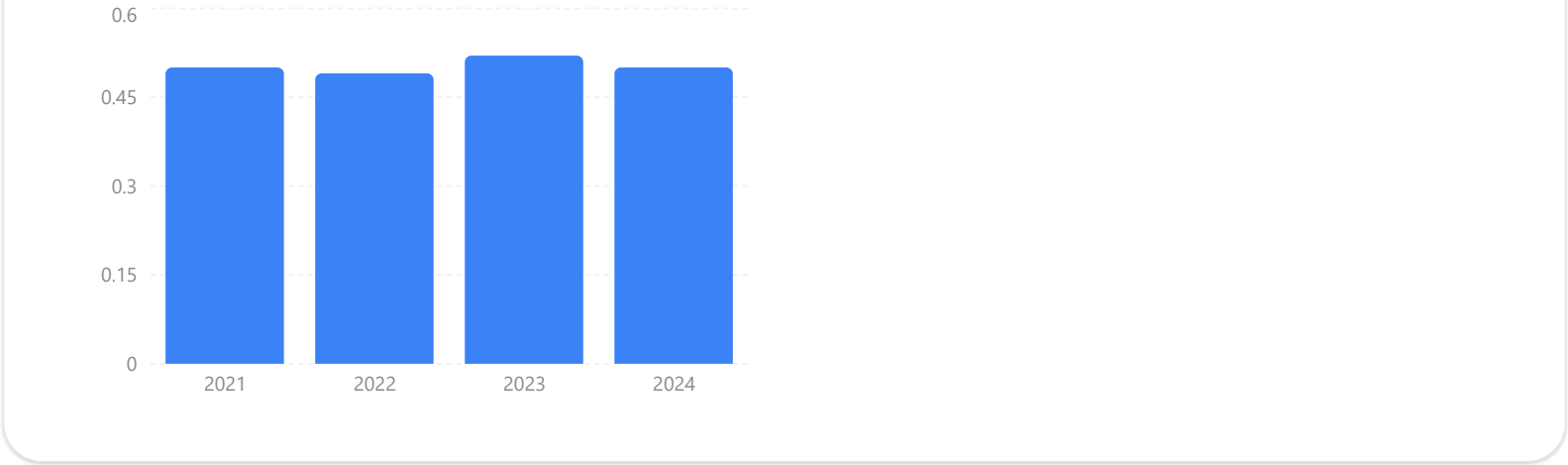
52-WEEK RANGE

\$137.62 - \$170.99

 P/E RATIO TREND



 DEBT TO EQUITY TREND



Latest News & AI Summaries

P&G Reports Fourth Quarter and Fiscal Year 2025 Results

The company reported annual sales of \$84.3 billion and returned \$16 billion to shareholders, but noted challenges in enterprise markets.

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P&G Declares 69th Consecutive Year of Dividend Increases

P&G increased its quarterly dividend to \$1.09 per share in April 2025, reinforcing its status as a premier Dividend King.

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Organic Sales Growth Decelerates to 1% in Q3

A significant revenue miss in early 2025 was attributed to slowing volumes and market volatility in China and the U.S.

[Read Article](#) INVESTING.COM

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Ask anything about The Procter & Gamble Company...



GROUNDING SOURCES

- ebsco.com
- bccresearch.com
- devex.com
- wikipedia.org
- sahmcapital.com
- wisesheets.io
- morningstar.com
- stockanalysis.com

Recommended S&P 500 Tickers (Income & Options)

TICKER	COMPANY	SECTOR	REASONING
PEP	PepsiCo, Inc.	Consumer Staples	Similar low-volatility profile to P&G but often offers slightly higher option premiums due to its broader beverage/snack portfolio.
JNJ	Johnson & Johnson	Health Care	A fellow Dividend King with massive options liquidity and very high reliability for put spread strategies.
KO	The Coca-Cola Company	Consumer Staples	Offers exceptional price stability and reliable dividends, making it ideal for income-focused options strategies.
ABBV	AbbVie Inc.	Health Care	Higher dividend yield than P&G with more 'volatility juice' for selling options, though with higher sector-specific risk.
MCD	McDonald's Corporation	Consumer Discretionary	Strong real estate-backed cash flows and a reliable dividend history provide a stable floor for selling puts.
CVX	Chevron Corporation	Energy	Provides a cyclical hedge with a strong dividend yield and high options liquidity for premium collection.

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