

Write Up: Cooper Standard (CPS)

May 2nd, 2025



A few weeks ago, I posted an analysis on Cooper Standard stock where I explained why the stock was severely undervalued given its incredible costs cuts, margin improvements and management's low guidance for the auto industry, sandbagging their projections for growth.

Today CPS released their earnings for 1Q2025 and they were simply fantastic. As of right now the stock is up 26% and I'm trimming my position in order to keep a balanced portfolio

This was my valuation back when I released the report:

	Revenue (M)	Revenue Growth	FCF margin		
Y0	\$2.730,00	-4%	6%	Company	CPS
Y1	\$2.620,80	-4%	6%	Rev. Growth Change	
y2	\$2.515,97	-4%	6%		
y3	\$2.415,33	-4%	6%		
y4	\$2.318,72	-4%	6%	market cap (M)	207,00
y5	\$2.225,97	-4%	6%	Future price (M)	801,35
				Multiple	6
Y5 FCF	\$133,56				
				return (CAGR)	31,09%

This was a great opportunity to buy a great company with great management that was doing the right operational moves to improve the business. I'll start to cut down my position a little to go back to around 10% of my portfolio.

With this move, our portfolio went up 6.61% today, putting us comfortable above the S&P500 since our inception in October 2024