Meta Platforms Inc (META)

Bargain Hunting May Emerge



Bloomberg

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Meta Platforms Inc

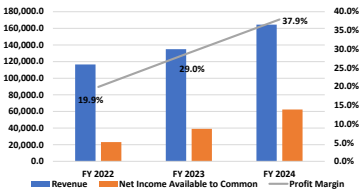
Company profile

Operating a myriad of applications; Facebook, Instagram, WhatsApp, Messenger, and Threads; alongside Reality Labs' VR/AR devices and content, Meta drives global social interaction and digital experiences.

Technical Data	
Price	618.94
R1	680.00
R2	681.00
S1	603.00
S2	602.00
MACD	-
RSI	-

M+ Research， Bloomberg

Financial Snapshot



M+ Research, Bloomberg

Technical Outlook

At Oversold Levels. META's is hovering in an overstretched position after the recent selldown. With the RSI dipping below into the oversold territory, we expect bargain hunting to emerge around current levels, prompting a potential mean reversion toward the near-term resistance at USD680. However, a break below USD603 would invalidate our buy setup.

Trading Catalysts

Earnings review. While concerns over tech-heavy valuations were tempered by the recent put positions of Michael Burry, famed for *"The Big Short"*, we see bargain-hunting opportunities in META. To recap, META reported revenue of USD51.2bn (+26% YoY), exceeding both street estimates of USD50.2bn and its own guidance of USD47.5–50.5bn.

Pool of users backed by AI integrations... With its AI integrations, we gathered that META continues to strengthen user engagement across its ecosystem; time spent rose 5% on FB, 8% on Threads, and >30% YoY on IG.

...to support its advertising business. Hence, we view this as a key catalyst driving its advertising business going forward, with the company guiding at least USD56bn in overall revenue for the next quarter. Moreover, META is trading at a discount of ~70-75% to the other Magnificent 7 peers' trailing and 1YR-forward P/E.

Peer Comparison

	Ticker	Price (USD)	Market Cap (USD'bn)	P/E (x)	Forward P/E (x)	ROE (%)	NP Margin (%)	RSI	ST Trend
Meta Platforms	**META**	**618.9**	**1560.4**	**21.7**	**18.1**	**32.6**	**37.9**	**Oversold**	**Down**
Alphabet	GOOGL	284.8	3439.5	32.7	24.4	35.5	28.6	Overbought	Up
Amazon.com	AMZN	243.0	2598.2	36.4	26.2	24.3	9.3	Positive bias	Up
Apple	AAPL	269.8	3986.2	36.1	32.7	171.4	26.9	Positive bias	Up
Microsoft	MSFT	497.1	3694.6	33.4	28.9	32.2	36.1	Negative bias	Down
NVIDIA	NVDA	188.1	4570.3	55.1	32.5	109.4	55.8	Negative bias	Up
Tesla	TSLA	445.9	1483.0	320.7	216.1	7.0	7.3	Positive bias	Up
Avg ex-Meta Platforms			**3295.3**	**85.7**	**60.1**	**63.3**	**27.3**		

Source: Bloomberg, M+ Research

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(a) nil.