Verisk Analytics, Inc (VRSK)

Updated June 19th, 2026 by Felix Martinez

Key Metrics

Current Price:	$174	**5 Year Annual Expected Total Return:**	7.4%	**Market Cap:**	$22.7 B
Fair Value Price:	$153	**5 Year Growth Estimate:**	9.0%	**Ex-Dividend Date:**	06/15/26
% Fair Value:	113%	**5 Year Valuation Multiple Estimate:**	-2.5%	**Dividend Payment Date:**	06/30/26
Dividend Yield:	1.2%	**5 Year Price Target**	$236	**Years Of Dividend Growth:**	7
Dividend Risk Score:	B	**Sector:**	Information Technology	**Rating:**	Hold

Overview & Current Events

Verisk Analytics, Inc. is an American multinational data analytics and risk assessment firm based in Jersey City, New Jersey, with customers in insurance, natural resources, financial services, government, and risk management sectors. The company uses proprietary data sets and industry expertise to provide predictive analytics and decision support consultations in areas including fraud prevention, actuarial science, insurance coverage, fire protection, catastrophe and weather risk, and data management. Through advanced data analytics, software, scientific research, and deep industry knowledge, Verisk empowers customers to strengthen operating efficiency, improve underwriting and claims outcomes, combat fraud, and make informed decisions about global issues, including climate change and extreme events, as well as political and ESG topics. The company has offices in more than thirty countries. Verisk has started and grown its dividend since 2019 and has a current market cap of $22.7 billion.

On April 29th, 2026, the company reported first quarter results for fiscal year 2026. The company reported first-quarter 2026 revenue of $783 million, up 3.9% year-over-year and 4.7% on an organic constant currency basis. Net income rose 0.8% to $234 million. Adjusted EBITDA increased 5.0% to $438 million, or 55.9% of revenue, while adjusted diluted EPS grew 5.2% to $1.82, beating estimates by $0.08. Growth was driven by strong performance in underwriting solutions, including catastrophe modeling, risk analytics, and specialty business lines, alongside solid contributions from claims and anti-fraud analytics.

Underwriting revenues increased 3.8% (5.3% OCC), supported by price increases, new client wins, and expanded renewals. Claims revenues rose 4.3% (3.4% OCC), fueled by anti-fraud solutions and casualty analytics, partially offset by softer property and restoration lines. The company maintained strong cost discipline, with adjusted EBITDA margin expanding 60 basis points. Cash flow from operations was $390 million, and free cash flow was $326 million. Verisk executed a $1.5 billion accelerated share repurchase program and paid a $0.50 per share dividend.

CEO Lee Shavel highlighted continued momentum, innovation in AI-driven solutions, and deepening client relationships across insurance workflows. The company reaffirmed full-year 2026 guidance: revenue of $3.19–$3.24 billion, adjusted EBITDA of $1.79–$1.83 billion (56.0%–56.5% margin), and adjusted diluted EPS of $7.45–$7.75. Verisk remains focused on leveraging its proprietary data assets and technology to drive long-term value amid evolving industry challenges.

Growth On A Per-Share Basis

Year	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2030
EPS	$3.11	$3.74	$4.11	$4.38	$5.04	$5.31	$5.76	$5.71	$6.64	$7.16	***$7.67***	***$11.80***
DPS	$0.00	$0.00	$0.00	$1.00	$1.08	$1.16	$1.24	$1.36	$1.56	$1.80	***$2.00***	***$2.81***
Shares[1]	171.0	169.0	168.0	167.0	165.0	163.0	154.7	146.0	142.8	140.0	***139.0***	***137.0***

Over the last ten years, earnings have grown by over 9.7% annually. However, earnings have been slowing down recently. For example, earnings have had a compound annual growth rate of 7.6% over the past five years. However, after 2025, we expect that the company will continue to grow its earnings at a 9% annual rate giving which would lead to earnings of $11.80 per share in 2031. The company started to pay its dividend in 2019 and has increased its yearly

[1] Share count is in millions.

with an average growth rate of 11.5%. The company can continue this growth rate as earnings will grow and because of the low dividend payout ratio.

Valuation Analysis

Year	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2031
Avg. P/E	26.1	25.7	26.3	34.0	41.2	43.1	30.6	41.8	41.4	30.9	***22.7***	***20.0***
Avg. Yld.	0.0%	0.0%	0.0%	0.7%	0.5%	0.5%	0.7%	0.6%	0.6%	0.8%	***1.2%***	***1.2%***

The company has a high valuation at present. The company has a current PE of 22.7x earnings with only an expected annual earnings growth of 9% for the next five years. Because of the lower earnings growth, a fair multiple would be 20x earnings. We would see a multiple compression of 2.5% over the next five years at the current price.

Safety, Quality, Competitive Advantage, & Recession Resiliency

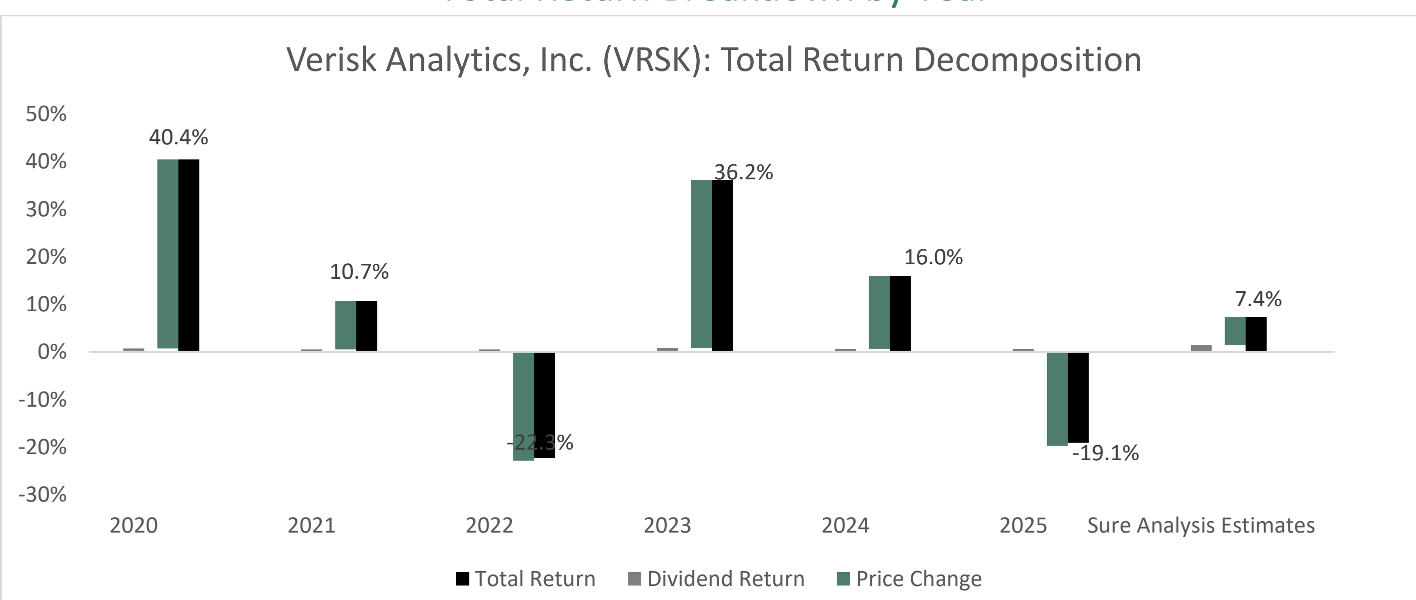
Year	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2031
Payout	0%	0%	0%	23%	21%	22%	22%	24%	23%	25%	***26%***	***24%***

The company's competitive advantage is its vast and diverse collection of proprietary data assets critical to its analytics and risk assessment solutions. These data assets are generated from various sources, including satellite imagery, insurance claims data, weather data, financial data, and more. The company's extensive data assets provide a significant competitive advantage as they allow Verisk Analytics to offer its customers unique insights and predictive analytics, enabling them to make informed decisions and manage risk effectively. The company's balance sheet is robust as it has a BBB credit rating by S&P. The company also has an interest coverage ratio of 7.9x, which is excellent. Verisk's debt to equity ratio is 10.8.

Final Thoughts & Recommendation

The company has been growing earnings nicely over the past ten years. Over the long term, this growth will continue. However, at the current price, the stock is expensive. Over the next five years, we expect the company to provide a return of 7.4% annually, primarily due to the current valuation. Thus, we rate the stock as a hold.

Total Return Breakdown by Year



Disclosure: This analyst has no position in the security discussed in this research report, and no plans to initiate one in the next 72 hours.

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Income Statement Metrics

Year	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Revenue	1,995	2,145	2,395	2,607	2,269	2,463	2,497	2681	2882	3073
Gross Profit	1,281	1,361	1,509	1,630	1,478	1,609	1,672	1805	1981	2147
Gross Margin	64.2%	63.5%	63.0%	62.5%	65.1%	65.3%	67.0%	67.3%	68.7%	69.9%
SG&A Exp.	302	323	379	604	308	313	382	392	409	458
D&A Exp.	225	237	296	324	358	384	340	281	306	327
Operating Profit	768	801	834	697	956	1,045	1,052	1132	1254	1344
Operating Margin	38.5%	37.3%	34.8%	26.7%	42.1%	42.5%	42.1%	42.2%	43.5%	43.7%
Net Profit	591	555	599	450	713	666	954	614	958	908
Net Margin	29.6%	25.9%	25.0%	17.3%	31.4%	27.1%	38.2%	22.9%	33.2%	29.6%
Free Cash Flow	421	560	703	740	821	887	784	831	920	1192
Income Tax	202	136	121	119	165	179	220	259	278	263

Balance Sheet Metrics

Year	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Total Assets	4,631	6,020	5,900	7,055	7,562	7,808	6,961	4366	4265	6196
Cash & Equivalents	135	142	140	185	219	112	113	303	291	2178
Accounts Receivable	216	291	300	373	381	268	274	317	421	413
Inventories										
Goodwill & Int.	3,589	4,714	4,589	5,263	5,493	2,530	2,181	2232	2119	2225
Total Liabilities	3,299	4,095	3,830	4,794	4,864	4,966	5,193	4044	4160	5886
Accounts Payable	74	69	75	80	99	92	129	158	86	73
Long-Term Debt	2,373	2,992	2,696	3,143	3,189	3,301	3,732	2832	3020	3214
Shareholder's Equity	1,332	1,925	2,071	2,261	2,698	2,817	1,749	310	100	309
D/E Ratio	1.78	1.55	1.30	1.39	1.18	1.17	2.13	9.14	30.17	15.86

Profitability & Per Share Metrics

Year	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Return on Assets	11.6%	10.4%	10.0%	6.9%	9.8%	8.7%	12.9%	10.9%	22.2%	17.4%
Return on Equity	43.7%	34.1%	30.0%	20.8%	28.7%	24.2%	41.8%	58.8%	448%	444%
ROIC	14.4%	12.9%	12.4%	8.8%	12.6%	11.1%	16.4%	14.2%	30.5%	21.4%
Shares Out.	171.0	169.0	168.0	167.0	165.0	163.0	154.7	147.3	142.8	140.1
Revenue/Share	11.66	12.72	14.23	15.65	13.73	15.08	15.71	18.20	20.17	21.93
FCF/Share	2.46	3.32	4.18	4.44	4.97	5.43	4.93	5.64	6.44	8.51

Note: All figures in millions of U.S. Dollars unless per share or indicated otherwise.