

VIDEO - Inventory And Capital Spending Might Be The Keys



Many investors continue to question the potential return on capital spending from the AI-exposed players and wonder whether the capital spending and inventory landscape are reasonable for the average stock to deliver margin expansion. There have been huge moves in inventory and capital spending in the last few years, and we think these should be key focus areas heading into the April earnings season. Our analysis shows the key metrics and top ideas are ...

[Read the full research note here.](#)

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