

Comparable Company Analysis

(\$ in millions, except price per share)

	Stock Price 11/14/19	Weekly Change	52-Week		2019E		EBITDA Margin	Market Cap	Enterprise Value	Net Debt / LTM EBITDA	Enterprise Value /						
			High	Low	Revenue	EBITDA					LTM		EBITDA				
											Revenue	EBITDA	CY 2019	CY 2020			
Defense Primes																	
Boeing	\$367.44	2.8%	\$446.01	\$292.47	\$80,579.9	\$3,943.5	4.9%	\$206,792.0	\$222,067.0	2.3x	2.55x	NM	NM	11.8x			
Lockheed Martin	390.16	3.0%	399.96	241.18	59,135.4	9,614.6	16.3%	110,053.0	122,191.0	1.3x	2.09x	13.2x	12.7x	12.2x			
Raytheon	216.70	0.8%	218.00	144.27	29,310.8	5,380.0	18.4%	60,346.4	63,779.4	0.7x	2.22x	14.1x	11.9x	11.0x			
Northrop Grumman	355.69	3.6%	383.89	223.63	34,005.9	4,733.2	13.9%	59,945.4	74,652.4	2.9x	2.24x	14.9x	15.8x	14.7x			
General Dynamics	185.19	1.2%	193.76	143.87	39,192.6	5,486.9	14.0%	53,449.4	67,877.4	2.7x	1.74x	12.5x	12.4x	11.8x			
BAE Systems	7.36	(1.7%)	7.61	5.66	25,561.2	3,083.1	12.1%	23,576.6	27,969.7	1.7x	1.27x	10.9x	9.1x	8.6x			
Median		2.0%			\$36,599.2	\$5,056.6	14.0%	\$60,145.9	\$71,264.9	2.0x	2.16x	13.2x	12.4x	11.8x			
Large Systems Suppliers																	
Honeywell	\$179.65	(0.0%)	\$183.12	\$123.48	\$36,798.2	\$8,786.6	23.9%	\$128,365.9	\$135,527.9	0.8x	3.67x	15.8x	15.4x	14.7x			
United Technologies	148.11	(0.4%)	149.35	100.48	76,780.1	14,177.4	18.5%	126,441.3	168,813.3	2.8x	2.23x	11.8x	11.9x	11.6x			
Thales S.A.	96.97	0.4%	125.76	93.56	20,277.9	2,706.5	13.3%	20,622.9	25,988.7	2.4x	1.38x	12.3x	9.6x	8.8x			
Rolls-Royce Holdings plc	9.40	(6.0%)	12.92	8.86	19,852.4	2,107.2	10.6%	18,086.8	21,094.7	3.8x	1.03x	NM	10.0x	8.3x			
Textron	46.34	(1.7%)	58.00	42.30	13,556.5	1,599.5	11.8%	10,577.7	14,103.7	2.1x	1.06x	8.6x	8.8x	8.7x			
Huntington Ingalls	255.40	2.0%	256.65	173.80	8,806.1	1,002.8	11.4%	10,446.0	12,171.0	1.8x	1.40x	12.5x	12.1x	10.0x			
Leonardo	12.61	1.7%	13.09	8.21	14,325.5	1,837.4	12.8%	7,248.1	12,187.6	2.9x	0.85x	7.2x	6.6x	6.1x			
FLIR Systems	53.20	0.4%	55.54	40.52	1,898.9	475.3	25.0%	7,136.9	7,627.0	1.2x	4.13x	18.6x	16.0x	14.9x			
Cobham	1.99	(0.0%)	2.20	1.24	2,554.9	407.0	15.9%	4,748.7	4,939.2	0.6x	1.98x	14.6x	12.1x	11.1x			
Median		(0.0%)			\$14,325.5	\$1,837.4	13.3%	\$10,577.7	\$14,103.7	2.1x	1.40x	12.4x	11.9x	10.0x			
Defense Suppliers																	
Teledyne	\$343.20	1.6%	\$347.02	\$189.35	\$3,154.3	\$604.3	19.2%	\$12,516.6	\$13,454.7	1.6x	4.37x	NM	NM	NM			
Elbit Systems	164.16	0.3%	168.32	116.54	3,394.0	NA	NA	7,249.4	7,898.2	1.4x	1.95x	17.2x	NA	NA			
Meggitt	8.02	(1.8%)	8.33	5.87	2,535.8	606.0	23.9%	6,192.0	7,620.5	3.2x	2.73x	16.9x	12.6x	12.6x			
Curtiss-Wright Corporation	140.80	0.9%	141.00	95.23	2,517.8	513.8	20.4%	6,010.6	6,626.9	1.2x	2.67x	12.9x	12.9x	12.2x			
Saab AB	33.04	1.1%	39.29	26.59	3,734.3	444.7	11.9%	4,388.6	5,022.7	1.5x	1.38x	12.7x	11.3x	9.7x			
Mercury Systems	72.53	3.8%	89.44	41.16	722.0	153.5	21.3%	4,028.1	3,927.0	(0.8x)	5.71x	NM	NM	NM			
Moog	88.66	1.1%	98.52	71.68	2,942.0	361.4	12.3%	3,071.2	3,814.7	2.1x	1.31x	10.7x	10.6x	9.3x			
Kongsberg Gruppen	15.09	(1.6%)	15.70	11.06	2,507.4	222.7	8.9%	2,715.7	3,000.1	1.7x	1.36x	18.0x	13.5x	9.6x			
Cubic	72.72	(0.1%)	75.20	50.61	1,495.3	157.2	10.5%	2,267.3	2,717.9	4.2x	1.93x	NM	17.3x	14.0x			
Kratos Defense & Security Solutions	19.63	(0.6%)	25.08	12.31	730.2	77.1	10.6%	2,086.1	2,305.0	3.2x	3.31x	NM	NM	NM			
Ultra Electronics	27.07	2.1%	29.54	15.45	1,032.3	178.2	17.3%	1,913.5	2,178.2	1.7x	2.13x	14.0x	12.2x	11.7x			
AeroVironment	62.10	2.8%	100.78	48.61	345.2	49.3	14.3%	1,475.1	1,184.8	(5.7x)	3.67x	NM	NM	NM			
Griffon	24.97	16.5%	25.50	9.65	2,220.8	196.3	8.8%	1,088.7	2,120.6	5.2x	0.96x	10.8x	10.8x	9.8x			
Comtech Telecommunications	35.99	3.3%	36.96	20.95	687.6	94.0	13.7%	873.4	993.6	1.6x	1.48x	13.1x	10.6x	9.6x			
Chemring	2.53	(2.6%)	2.76	1.73	452.8	86.4	19.1%	710.0	819.4	7.2x	2.07x	NM	9.5x	8.3x			
Ducommun	48.63	5.1%	52.04	33.30	715.8	88.2	12.3%	562.3	800.9	3.0x	1.15x	9.9x	9.1x	8.3x			
Cohort	7.08	0.4%	7.20	4.56	177.8	26.3	14.8%	289.5	306.0	0.4x	1.94x	13.0x	11.6x	10.6x			
Median		1.1%			\$1,495.3	\$167.7	14.0%	\$2,267.3	\$2,717.9	1.7x	1.95x	13.0x	11.5x	9.8x			

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Space	Stock Price 11/14/19	Weekly Change	52-Week		2019E		EBITDA Margin	Market Cap	Enterprise Value	Net Debt / LTM EBITDA	Enterprise Value /			
			High	Low	Revenue	EBITDA					LTM		EBITDA	
											Revenue	EBITDA	CY 2019	CY 2020
Ball	\$65.74	1.0%	\$81.88	\$42.24	\$11,629.2	\$1,868.6	16.1%	\$21,505.5	\$28,348.5	3.7x	2.45x	15.6x	15.2x	13.9x
Viasat	71.17	7.2%	97.31	55.93	2,263.7	435.0	19.2%	4,366.5	6,106.9	5.8x	2.72x	NM	14.0x	11.4x
Aerojet Rocketdyne	43.95	1.4%	52.84	30.11	1,963.2	293.9	15.0%	3,464.8	3,360.8	(0.4x)	1.77x	11.9x	11.4x	11.0x
OHB SE	42.45	2.2%	43.39	31.38	1,138.6	88.8	7.8%	738.7	983.3	3.3x	0.88x	14.6x	11.1x	10.1x
Maxar Technologies	11.38	1.8%	19.36	3.85	1,922.3	486.8	25.3%	678.7	4,026.7	8.0x	2.05x	9.6x	8.3x	7.7x
Gilat Satellite	7.37	(8.2%)	9.89	7.35	NA	NA	NA	408.6	381.8	(0.8x)	1.50x	11.1x	NA	NA
Median		1.6%			\$1,963.2	\$435.0	16.1%	\$2,101.8	\$3,693.8	3.5x	1.91x	11.9x	11.4x	11.0x

Homeland Security	Stock Price 11/14/19	Weekly Change	52-Week		2019E		EBITDA Margin	Market Cap	Enterprise Value	Net Debt / LTM EBITDA	Enterprise Value /			
			High	Low	Revenue	EBITDA					LTM		EBITDA	
											Revenue	EBITDA	CY 2019	CY 2020
Smiths Group	\$21.02	(1.8%)	\$21.91	\$16.92	\$3,152.8	\$779.6	24.7%	\$8,328.6	\$9,845.3	2.4x	3.22x	16.2x	12.6x	13.2x
MSA Safety Incorporated	125.41	0.9%	126.62	86.72	1,409.3	296.7	21.1%	4,858.1	5,109.9	0.8x	3.68x	17.4x	17.2x	16.0x
Axon	23.27	2.1%	30.15	17.18	505.4	81.5	16.1%	3,957.4	3,657.6	(12.6x)	7.72x	NM	NM	NM
OSI Systems, Inc.	97.15	2.0%	117.21	68.58	1,220.3	187.9	15.4%	1,783.4	2,083.2	1.9x	1.73x	13.4x	11.1x	9.7x
Sturm, Ruger & Company	45.12	(5.2%)	60.01	39.31	0.0	0.0	NA	787.2	652.5	(1.7x)	1.53x	8.4x	NA	NA
Avon Rubber	24.96	5.9%	25.09	13.84	248.7	53.4	21.5%	761.7	702.3	(1.4x)	3.18x	16.6x	13.2x	11.0x
American Outdoor Brand	8.36	4.7%	15.32	5.41	618.7	103.3	16.7%	458.3	660.0	2.2x	1.06x	7.3x	6.4x	5.4x
AirBoss of America	5.64	(7.8%)	7.85	5.35	327.6	31.7	9.7%	132.0	192.0	2.2x	0.60x	7.2x	6.1x	5.0x
Median		1.4%			\$562.0	\$92.4	16.7%	\$1,285.3	\$1,392.7	1.4x	2.46x	13.4x	11.9x	10.3x

Tier 1 Aerospace	Stock Price 11/14/19	Weekly Change	52-Week		2019E		EBITDA Margin	Market Cap	Enterprise Value	Net Debt / LTM EBITDA	Enterprise Value /			
			High	Low	Revenue	EBITDA					LTM		EBITDA	
											Revenue	EBITDA	CY 2019	CY 2020
Airbus	\$149.61	2.4%	\$150.62	\$85.34	\$77,144.2	\$10,193.2	13.2%	\$116,320.6	\$121,187.1	0.7x	1.60x	16.5x	11.9x	10.1x
Safran	164.02	2.0%	164.74	110.10	26,952.2	5,183.1	19.2%	70,641.7	75,988.7	1.0x	2.77x	14.8x	14.7x	13.3x
TransDigm	559.77	4.0%	560.61	311.46	5,954.1	2,593.9	43.6%	29,877.6	44,221.4	6.6x	9.03x	NM	17.0x	15.7x
MTU Aero Engines	265.72	1.0%	283.23	171.35	5,268.2	1,011.7	19.2%	13,752.8	13,607.8	(0.2x)	2.68x	15.3x	13.5x	12.2x
Spirit AeroSystems	89.56	2.9%	100.34	64.48	7,851.9	1,163.4	14.8%	9,271.0	10,013.8	0.6x	1.29x	8.4x	8.6x	7.7x
Bombardier	1.53	1.5%	2.29	1.15	16,602.1	1,253.6	7.6%	3,644.9	13,565.9	8.7x	0.86x	14.9x	10.8x	8.4x
Embraer	16.56	(6.8%)	23.68	15.86	5,259.9	242.0	4.6%	3,036.9	7,368.4	(3.7x)	1.42x	NM	NM	13.0x
Triumph Group	28.40	7.7%	28.78	11.16	3,053.8	215.6	7.1%	1,422.4	2,946.7	6.6x	0.93x	12.7x	13.7x	8.9x
Astronics	30.52	(1.3%)	44.34	25.85	756.4	77.0	10.2%	937.1	1,125.2	2.1x	1.45x	12.5x	14.6x	10.4x
Median		2.0%			\$5,954.1	\$1,163.4	13.2%	\$9,271.0	\$13,565.9	1.0x	1.45x	14.8x	13.6x	10.4x

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			High	Low	Revenue	EBITDA					LTM		EBITDA	
											Revenue	EBITDA	CY 2019	CY 2020
Aerospace Suppliers														
HEICO	\$128.51	5.8%	\$147.93	\$71.47	\$2,088.6	\$555.1	26.6%	\$14,865.1	\$15,651.0	1.1x	7.86x	NM	NM	NM
CAE	27.17	6.6%	27.82	18.53	2,789.9	638.2	22.9%	7,232.5	9,139.3	3.6x	3.40x	17.9x	14.3x	12.6x
Hexcel	79.48	3.4%	87.00	53.50	2,382.7	578.6	24.3%	6,706.4	7,851.4	2.0x	3.34x	13.9x	13.6x	12.6x
BBA Aviation	3.90	(0.7%)	4.21	2.67	2,396.5	519.7	21.7%	4,014.7	6,518.2	5.8x	2.52x	15.2x	12.5x	12.1x
John Bean Technologies	104.43	(5.5%)	127.97	66.28	1,933.8	291.3	15.1%	3,306.9	4,061.4	2.8x	2.10x	15.0x	13.9x	12.4x
AAR	44.63	1.0%	47.62	29.84	2,159.9	176.1	8.2%	1,537.0	1,786.1	1.6x	0.84x	11.4x	10.1x	9.7x
Wesco Aircraft	10.99	(0.4%)	11.31	7.38	1,724.2	190.7	11.1%	1,096.2	1,877.3	5.6x	1.12x	13.4x	9.8x	9.5x
Senior	2.31	0.9%	3.36	2.11	1,465.7	184.5	12.6%	962.1	1,303.0	2.0x	0.90x	7.6x	7.1x	6.9x
Astronics	30.52	(1.3%)	44.34	25.85	756.4	77.0	10.2%	937.1	1,125.2	2.1x	1.45x	12.5x	14.6x	10.4x
Magellan Aerospace	12.19	(2.4%)	14.34	9.96	760.0	115.1	15.1%	709.4	761.0	0.4x	0.98x	6.6x	6.6x	6.4x
CPI Aerostructures	7.47	0.5%	8.64	5.83	102.5	11.9	11.6%	88.6	124.4	3.1x	1.23x	10.9x	10.5x	8.4x
Median		0.5%			\$1,933.8	\$190.7	15.1%	\$1,537.0	\$1,877.3	2.1x	1.45x	12.9x	11.5x	10.1x
Diversified Industrial Technology														
Eaton	\$90.89	(0.0%)	\$92.96	\$64.46	\$21,619.7	\$3,921.9	18.1%	\$37,573.9	\$45,350.9	2.0x	2.10x	11.7x	11.6x	11.2x
TE Connectivity	92.90	(1.2%)	97.99	69.84	13,216.2	2,879.2	21.8%	31,072.7	34,110.7	1.0x	2.54x	11.6x	11.8x	11.9x
Parker-Hannifin	194.25	(2.5%)	201.38	140.82	14,146.4	2,534.5	17.9%	24,954.3	30,290.6	2.1x	2.14x	12.2x	12.0x	11.4x
AMETEK	97.00	0.8%	97.52	63.14	5,195.2	1,384.3	26.6%	22,173.5	24,047.3	1.4x	4.69x	17.4x	17.4x	16.2x
Dover	108.71	(0.4%)	110.81	65.83	7,162.8	1,350.5	18.9%	15,791.9	18,711.7	2.2x	2.61x	14.2x	13.9x	12.9x
Singapore Technologies Engineering	3.10	1.9%	3.19	2.50	5,631.7	713.1	12.7%	9,657.6	11,064.7	1.8x	2.08x	16.5x	15.5x	13.8x
Woodward	113.92	4.3%	119.20	68.40	2,945.7	568.8	19.3%	7,045.5	8,177.6	2.2x	2.84x	15.6x	14.4x	12.8x
Oshkosh	90.72	2.1%	92.63	56.47	8,299.5	870.8	10.5%	6,204.8	6,575.4	0.4x	0.78x	7.2x	7.6x	7.8x
Crane	81.61	1.6%	92.57	67.18	3,277.0	605.8	18.5%	4,894.9	5,558.3	1.2x	1.69x	9.9x	9.2x	8.5x
Rheinmetall	113.31	(8.6%)	131.04	81.11	6,957.9	850.2	12.2%	4,877.5	5,738.9	1.0x	0.84x	7.6x	6.8x	6.3x
The Timken Co	53.17	(0.6%)	54.52	33.98	3,778.8	729.6	19.3%	4,005.0	5,646.7	2.3x	1.48x	8.4x	7.7x	7.9x
Barnes Group	59.84	(1.0%)	62.20	42.39	1,496.7	340.8	22.8%	3,034.7	3,864.2	2.5x	2.57x	11.7x	11.3x	10.9x
ESCO Technologies	85.14	(0.3%)	86.91	61.28	832.7	164.6	19.8%	2,212.0	2,392.1	1.2x	2.96x	15.5x	14.5x	13.7x
SPX	47.76	4.3%	48.14	25.22	1,516.2	201.6	13.3%	2,108.4	2,468.2	2.5x	1.62x	17.3x	12.2x	11.3x
Spartan Motors	17.80	0.7%	19.31	6.97	997.0	52.7	5.3%	618.0	765.7	4.6x	0.76x	NM	14.5x	12.8x
Median		(0.0%)			\$5,195.2	\$729.6	18.5%	\$6,204.8	\$6,575.4	2.0x	2.10x	12.0x	12.0x	11.4x
Overall Median		0.9%			\$2,545.4	\$486.8	15.1%	\$4,388.6	\$5,738.9	2.0x	1.95x	12.9x	11.9x	11.0x

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			High	Low	Revenue	EBITDA					LTM		EBITDA	
											Revenue	EBITDA	CY 2019	CY 2020
Leidos Holdings	\$90.44	5.2%	\$90.48	\$50.33	\$10,969.7	\$1,132.6	10.3%	\$12,803.0	\$15,712.0	2.7x	1.46x	14.8x	13.9x	13.2x
Booz Allen Hamilton	73.26	2.2%	78.01	43.24	7,237.4	729.2	10.1%	10,284.3	11,965.0	2.3x	1.69x	16.7x	16.4x	15.3x
CACI International	230.23	1.9%	235.00	138.39	5,378.3	491.3	9.1%	5,765.4	7,693.4	4.0x	1.48x	15.8x	15.7x	12.4x
SAIC	82.64	0.1%	92.49	58.19	6,424.3	535.9	8.3%	4,768.4	6,918.4	4.6x	1.24x	14.8x	12.9x	11.9x
Perspecta Inc.	27.91	2.8%	29.88	15.74	4,480.0	804.0	17.9%	4,515.1	7,363.1	5.1x	1.66x	NM	9.2x	9.7x
ManTech International	77.50	2.9%	86.28	48.25	2,200.9	188.6	8.6%	3,107.9	3,227.2	0.7x	1.53x	17.7x	17.1x	15.8x
ICF International	87.02	(2.6%)	92.06	60.22	1,486.7	137.7	9.3%	1,636.9	2,030.3	2.9x	1.39x	15.2x	14.7x	13.4x
Vectrus, Inc.	53.50	2.3%	55.50	19.61	1,388.2	60.0	4.3%	615.7	667.0	0.9x	0.50x	11.6x	11.1x	9.2x
VSE Corporation	38.67	(2.1%)	40.95	24.06	0.0	0.0	NA	424.2	720.7	3.4x	0.98x	8.3x	NA	NA
Median		2.2%			\$4,480.0	\$491.3	9.2%	\$4,515.1	\$6,918.4	2.9x	1.46x	15.0x	14.3x	12.8x

Engineering and Construction	Stock Price 11/14/19	Weekly Change	52-Week		2019E		EBITDA Margin	Market Cap	Enterprise Value	Net Debt / LTM EBITDA	Enterprise Value /			
			High	Low	Revenue	EBITDA					LTM		EBITDA	
											Revenue	EBITDA	CY 2019	CY 2020
Jacobs Engineering	\$94.50	(1.3%)	\$98.08	\$55.17	\$12,885.0	\$1,026.4	8.0%	\$12,804.6	\$13,102.3	0.2x	0.78x	12.3x	12.8x	11.9x
AECOM	43.51	3.0%	44.36	24.83	20,139.3	973.9	4.8%	6,834.8	9,366.2	2.5x	0.46x	10.2x	9.6x	8.7x
EMCOR Group	90.61	(1.0%)	93.54	57.29	9,046.7	538.2	5.9%	5,088.0	5,231.8	0.3x	0.58x	9.7x	9.7x	9.2x
Tetra Tech	86.35	(0.4%)	90.34	48.52	2,533.7	270.4	10.7%	4,718.9	4,874.9	0.7x	2.04x	NM	18.0x	16.2x
KBR	29.90	2.4%	30.20	13.90	5,653.6	468.6	8.3%	4,237.3	5,052.3	2.1x	0.92x	13.4x	10.8x	9.5x
Parsons	38.02	0.2%	39.05	29.03	3,947.6	299.6	7.6%	3,774.0	4,156.4	1.9x	1.08x	NM	13.9x	12.3x
Babcock International	6.65	(2.5%)	7.79	5.28	6,425.8	996.2	15.5%	3,358.3	4,863.2	2.1x	0.83x	6.8x	4.9x	4.7x
Fluor	18.20	(3.4%)	46.97	16.00	16,010.3	(482.6)	(3.0%)	2,551.2	2,784.0	(0.9x)	0.15x	NM	NM	5.1x
Tutor Perini	18.32	(0.8%)	20.52	9.24	4,617.9	241.9	5.2%	921.1	1,576.0	2.6x	0.35x	6.1x	6.5x	5.0x
Median		(0.8%)			\$6,425.8	\$468.6	7.6%	\$4,237.3	\$4,874.9	1.9x	0.78x	9.9x	10.3x	9.2x

Diversified IT	Stock Price 11/14/19	Weekly Change	52-Week		2019E		EBITDA Margin	Market Cap	Enterprise Value	Net Debt / LTM EBITDA	Enterprise Value /			
			High	Low	Revenue	EBITDA					LTM		EBITDA	
											Revenue	EBITDA	CY 2019	CY 2020
Accenture	\$196.25	3.8%	\$202.80	\$132.63	\$43,752.2	\$7,323.7	16.7%	\$124,631.1	\$118,942.3	(0.9x)	2.75x	17.2x	16.2x	15.0x
CGI	80.86	1.6%	80.93	58.80	9,280.1	1,699.3	18.3%	21,663.6	23,270.4	1.0x	2.54x	14.7x	13.7x	13.1x
Tyler Technologies	282.28	3.0%	284.33	173.26	1,088.7	308.1	28.3%	11,005.1	10,835.3	(0.9x)	10.42x	NM	NM	NM
MAXIMUS	76.97	1.3%	82.02	60.00	3,008.0	421.2	14.0%	4,911.5	4,844.8	(0.2x)	1.80x	13.2x	11.5x	11.0x
ASGN Incorporated	66.66	(0.8%)	70.55	50.33	3,902.8	445.1	11.4%	3,519.6	4,528.9	2.5x	1.18x	11.1x	10.2x	9.5x
NIC	23.59	4.4%	24.38	11.76	352.8	83.9	23.8%	1,579.7	1,382.5	(2.8x)	4.00x	19.4x	16.5x	14.6x
Unisys	10.91	(1.0%)	15.41	6.39	2,948.5	447.5	15.2%	680.7	1,035.0	1.2x	0.35x	4.1x	2.3x	2.0x
Median		1.6%			\$3,008.0	\$445.1	16.7%	\$4,911.5	\$4,844.8	(0.2x)	2.54x	13.9x	12.6x	12.1x