Stryker Corporation (NYSE: SYK)

One-page summary of Smit Patel's research report

Report date: May 22, 2026 | Rating: Strong buy | Price target: $395.05

The Unstoppable MedTech Compounding Machine

Thesis: Stryker's Mako robotics ecosystem supports recurring implant sales, while demographic demand and targeted acquisitions underpin long-term growth.

Key arguments from the report

Mako SmartRobotics creates a recurring-revenue model: installed systems require proprietary Stryker implants and disposables.

The report cites 2025 net sales of $25.116 billion and highlights volume-driven organic growth and an expanding medical technology portfolio.

The investment case emphasizes acquisition-led expansion, demographic tailwinds, and a potential recovery from the Q1 2026 operational disruption described in the report.

Valuation and uncertainties

The report's DCF uses a 7.79% WACC and 2.10% terminal growth rate. The stated target is an opinion as of the report date, not a current market quote.

Key uncertainties include execution after the reported operational disruption, acquisition integration, and the sensitivity of valuation to discount rates and long-term growth assumptions.

Source and disclosure

Prepared from Smit Patel's original seven-page Stryker report. Read the full report and linked model for the detailed analysis. This summary does not update or independently verify its claims.

This is not financial advice. Simply the opinions and due diligence of a college senior studying finance and accounting.