

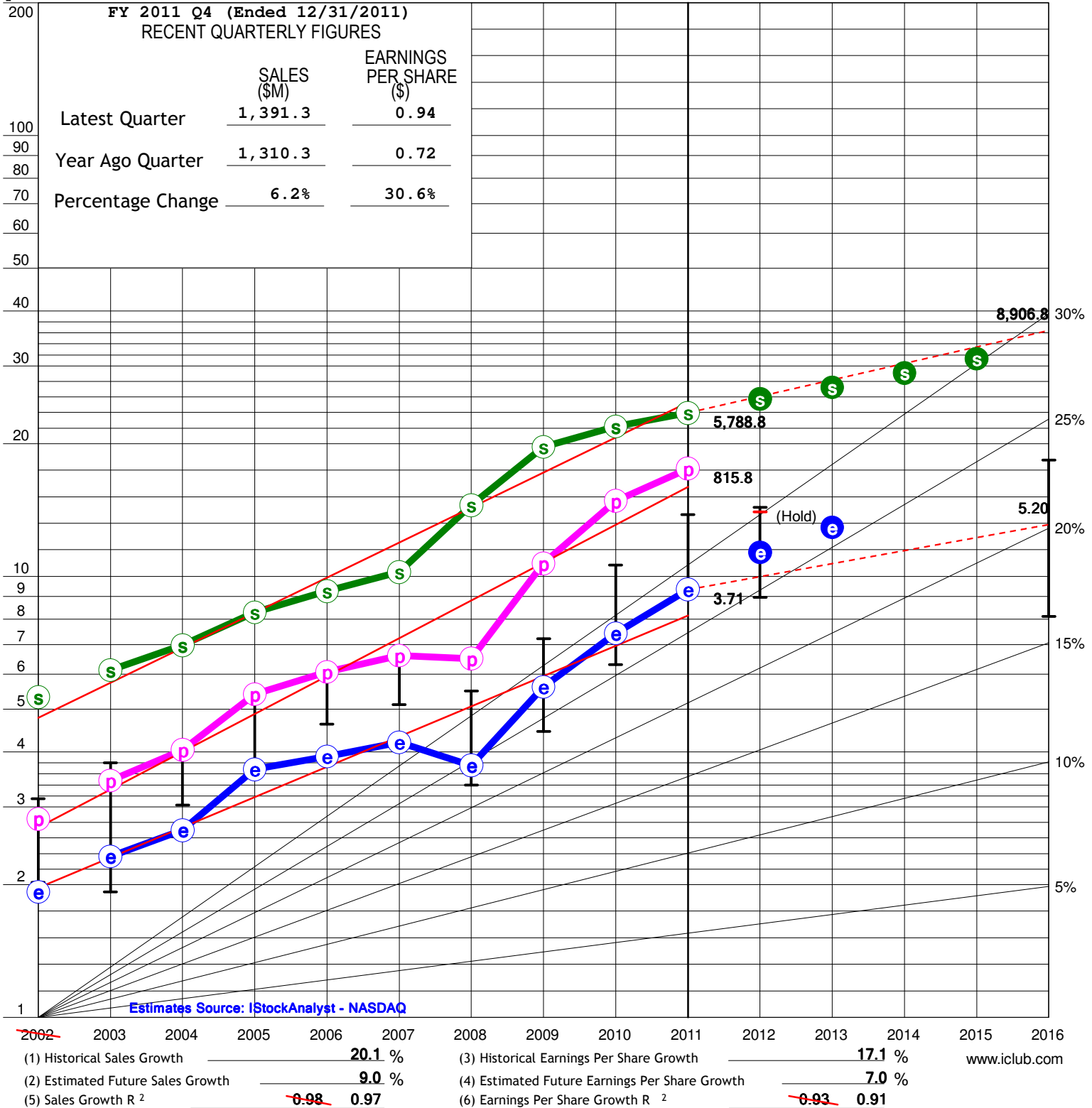


Stock Selection Guide

Company	O'Reilly Automotive R..	Price Date	02/13/12
Study by	RCB	Data Date	02/13/12
Sector	Consumer Cyclical	Data Source	BI
Industry Specialty	Retail	Reference	Morningstar
Preferred(\$M)	0.0		
Common(M Shares)	128.1	% Insiders	4.5
Debt(\$M)	797.6	% Institutions	90.3
% Debt to Tot.Cap.	22.0	Quality	3.2 (Take Stock)

1 Growth Analysis

NAS: ORLY



2 QUALITY ANALYSIS

Company **O'Reilly Automotive RCB 0212**

(ORLY)

02/13/12

	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	5 YEAR AVG.	TREND UP / DOWN
A % Pre-tax Profit on Sales	10.0	10.6	10.9	12.3	12.4	12.2	8.5	10.3	12.8	14.1	11.6	UP
B % Return on Equity	12.5	12.7	12.3	14.2	12.9	12.1	8.7	11.4	13.0	16.8	12.4	UP
C % Debt to Equity	29.4	15.5	10.6	2.2	8.1	4.7	34.3	25.7	11.3	26.8	20.6	UP

3 PRICE, PRICE/EARNINGS RATIO and DIVIDEND ANALYSIS

CURRENT PRICE (P/E) **83.23 (22.4)** 52-WEEK HIGH (P/E) **85.32 (22.9)** 52-WEEK LOW (P/E) **53.33 (14.3)**

Fiscal Year	High Price	Low Price	EPS	High P/E	Low P/E	Dividend	% Payout	% High Yield	
1 2007	38.8	30.4	1.67	23.2	18.2	0.000	0.0	0.0	
2 2008	32.7	20.0	1.48	22.1	13.5	0.000	0.0	0.0	
3 2009	42.9	26.5	2.23	19.2	11.9	0.000	0.0	0.0	
4 2010	63.1	37.5	2.95	21.4	12.7	0.000	0.0	0.0	
5 2011	82.2	53.3	3.71	22.2	14.4	0.000	0.0	0.0	
6 AVERAGE		33.5		21.6	14.1		0.0		
AVERAGE P/E RATIO	17.9		PROJECTED P/E RATIO	20.9		TTM EPS	3.72		
CURRENT P/E RATIO	22.4		PEG RATIO	3.0		FTM EPS	3.98		
RELATIVE VALUE	125.0		PROJ. RELATIVE VALUE	116.8		AVG TTM + FTM EPS	3.85		

4 EVALUATING REWARD and RISK over the next 5 years

A FUTURE HIGH PRICE ANALYSIS -- NEXT 5 YEARS

Selected High P/E ~~21.6~~ **21.0** X Estimated High Earnings/Share **5.20** = Forecast High Price \$ **109.2**

B FUTURE LOW PRICE ANALYSIS -- NEXT 5 YEARS

(a) Sel. Low P/E ~~14.1~~ **13.0** (as adj.) X Estimated Low Earnings/Share **3.71** = \$ **48.2**

(b) Average 5-Year Low Price = **33.5**

(c) Recent Severe Low Price = **37.5**

(d) Price Dividend Will Support = Present Divd. + High Yield = **0.000** + **0.000** = **0.0**

Selected Estimated Low Price = \$ **48.2**

C PRICE RANGES

Forecast High Price **109.2** - Estimated Low Price **48.2** = Range **61.0** 25% of Range = **15.2**

BUY (Lower 25% of Range) = **48.2** to **63.4**

MAYBE (Middle 50% of Range) = **63.4** to **94.0**

SELL (Upper 25% of Range) = **94.0** to **109.2**

Current Price **83.230** is in the **Hold** Range

D UPSIDE/DOWNSIDE ANALYSIS (Potential Gain vs. Risk of Loss)

(Forecast High Price **109.2** - Current Price **83.230**) + (Current Price **83.230** - Estimated Low Price **48.2**) = **0.7** To 1

5 TOTAL RETURN ANALYSIS

A CURRENT YIELD

Present Full Year's Dividend \$ **0.000** ÷ Current Price of Stock \$ **83.230** = **0.0** % Present Yield or % Returned on Purchase Price

B AVERAGE YIELD - USING FORECAST HIGH P/E

Avg. % Payout **0.0** ÷ Forecast High P/E **21.0** = Avg. Yield **0.0**

AVERAGE YIELD - USING FORECAST AVERAGE P/E

Avg. % Payout **0.0** ÷ Forecast Avg P/E **17.0** = Avg. Yield **0.0**

C % COMPOUND ANNUAL TOTAL RETURN - USING FORECAST HIGH P/E

Average Yield **0.0** % + Annual Appreciation **5.6** % = Compound Annual Total Return **5.6** %

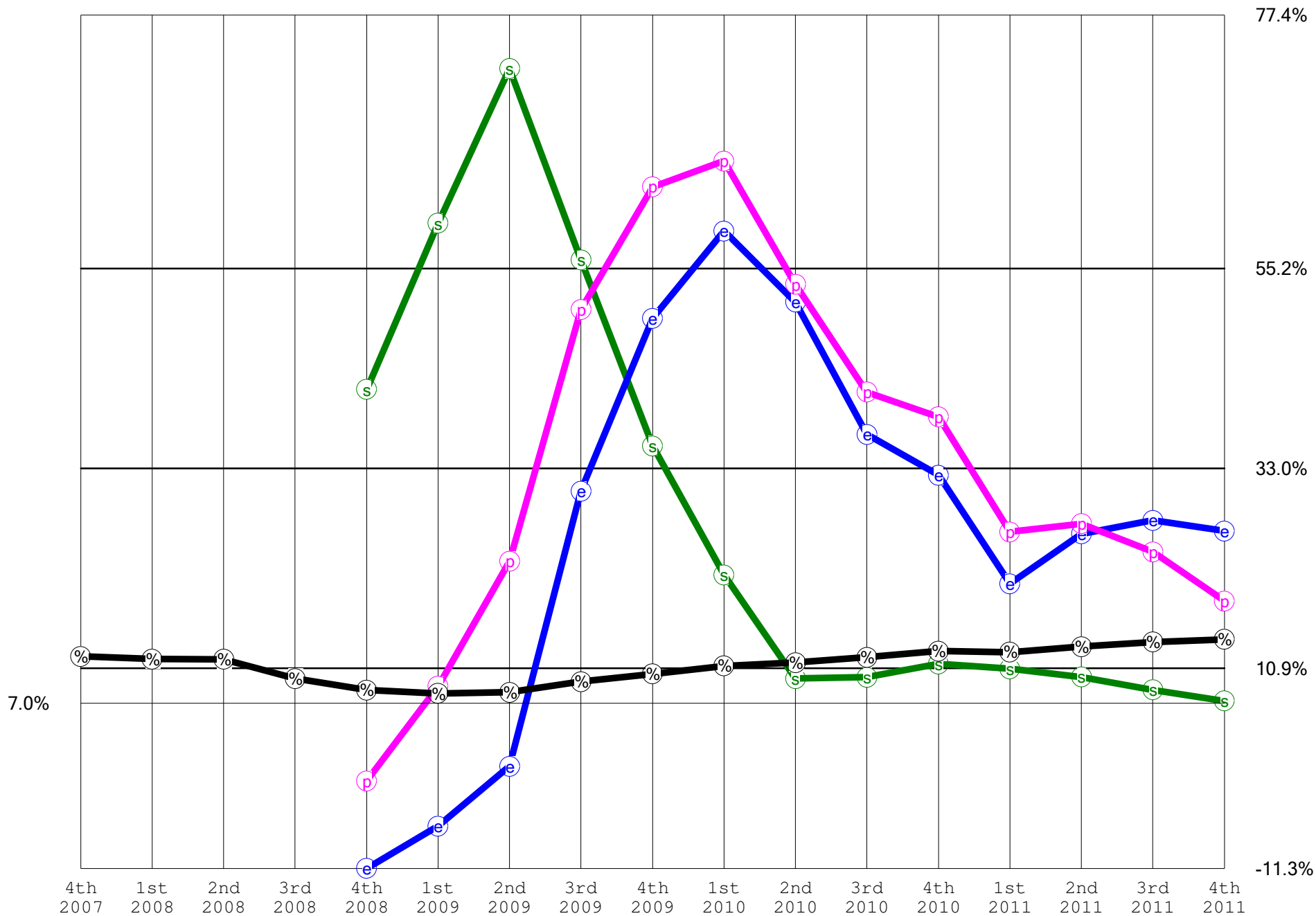
D % PROJECTED AVERAGE RETURN - USING FORECAST AVERAGE P/E

Average Yield **0.0** % + Annual Appreciation **1.2** % = Projected Average Total Return **1.2** %

Trailing 4 quarters

PERT-A Graph

Company O'Reilly Automotive RCB 0212 (ORLY)



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Prepared using Toolkit 6. 2/14/2012 5:06:07 PM

NOTES:=====

02/17/2011 Purchased 20 shares O'Reilly Automotive Inc (ORLY) at 56.18
per share, 7.00 commission 1,130.60

Cost	Total		Shares Basis/Share	Cost Basis
O'Reilly Automotive Inc (ORLY)	20.0000 56.5300		1,130.60	

2/13/2012

Price/Sh	Market Value	Unrealized Gain/(Loss)	Percent of Port
83.23	1664.00	534.00	6.1% -

Price Up 47%

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