

Oppenheimer Holdings Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

<https://marketpublishers.com/r/OF41030DA50BEN.html>

Date: May 2025

Pages: 50

Price: US\$ 499.00 (Single User License)

ID: OF41030DA50BEN

Abstracts

Oppenheimer Holdings Inc. Fundamental Company Report provides a complete overview of the company's affairs. All available data is presented in a comprehensive and easily accessed format. The report includes financial and SWOT information, industry analysis, opinions, estimates, plus annual and quarterly forecasts made by stock market experts. The report also enables direct comparison to be made between Oppenheimer Holdings Inc. and its competitors. This provides our Clients with a clear understanding of Oppenheimer Holdings Inc. position in the Industry.

The report contains detailed information about Oppenheimer Holdings Inc. that gives an unrivalled in-depth knowledge about internal business-environment of the company: data about the owners, senior executives, locations, subsidiaries, markets, products, and company history.

Another part of the report is a SWOT-analysis carried out for Oppenheimer Holdings Inc.. It involves specifying the objective of the company's business and identifies the different factors that are favorable and unfavorable to achieving that objective. SWOT-analysis helps to understand company's strengths, weaknesses, opportunities, and possible threats against it.

The Oppenheimer Holdings Inc. financial analysis covers the income statement and ratio trend-charts with balance sheets and cash flows presented on an annual and quarterly basis. The report outlines the main financial ratios pertaining to profitability, margin analysis, asset turnover, credit ratios, and

company's long-term solvency. This sort of company's information will assist and strengthen your company's decision-making processes.

In the part that describes Oppenheimer Holdings Inc. competitors and the industry in whole, the information about company's financial ratios is compared to those of its competitors and to the industry. The unique analysis of the market and company's competitors along with detailed information about the internal and external factors affecting the relevant industry will help to manage your business environment. Your company's business and sales activities will be boosted by gaining an insight into your competitors' businesses.

Also the report provides relevant news, an analysis of PR-activity, and stock price movements. The latter are correlated with pertinent news and press releases, and annual and quarterly forecasts are given by a variety of experts and market research firms. Such information creates your awareness about principal trends of Oppenheimer Holdings Inc. business.

About Oppenheimer Holdings Inc.

Oppenheimer Holdings Inc., through its subsidiaries, provides various financial services to high-net-worth individuals and families, corporate executives, and small and mid-sized businesses worldwide. It engages in a range of activities in the securities industry, including retail securities brokerage, institutional sales and trading, investment banking (both corporate and public finance), research, market-making, trust services, and investment advisory and asset management services.

Subsidiaries

The company owns, directly or through subsidiaries, Oppenheimer & Co. Inc., (Oppenheimer) a New York-based securities broker-dealer, Oppenheimer Asset Management (OAM), a New York-based investment advisor, Freedom Investments Inc. (Freedom), a discount securities broker-dealer based in New Jersey, Oppenheimer Trust Company (Oppenheimer Trust), a New Jersey limited purpose bank, OPY Credit Corp., a New York corporation, organized to trade and clear syndicated corporate loans, and Evanston Financial Inc. (Evanston), a Federal Housing Administration (FHA) approved mortgage company based in Pennsylvania. The company's international businesses are carried on through Oppenheimer E.U. Ltd. (United Kingdom), Oppenheimer Investments Asia Ltd. (Hong Kong), Oppenheimer Israel (OPCO) Ltd.

(Israel), and Oppenheimer Canada Inc. (Canada).

PRIVATE CLIENT

Through its Private Client Division, Oppenheimer provides various financial services through a network of 1,333 financial advisors in 86 offices located throughout the United States, and in two offices in Latin America through local broker-dealers. Clients include high-net-worth individuals and families, corporate executives, and small and mid-sized businesses. Oppenheimer provides the following private client services:

Full-Service Brokerage: Oppenheimer offers brokerage covering various investment alternatives, including exchange-traded and over-the-counter corporate equity and debt securities, money market instruments, exchange-traded options and futures contracts, municipal bonds, mutual funds, and unit investment trusts.

Wealth Planning: Oppenheimer also offers financial and wealth planning services, which include individual and corporate retirement solutions, including insurance and annuities products, IRAs and 401(k) plans, the U.S. stock plan services to corporate executives and businesses, education saving programs, and trust and fiduciary services to individual and corporate clients.

Margin Lending: Oppenheimer extends credit to its customers, collateralized by securities and cash in the customer's account, for a portion of the purchase price, and receives income from interest charged on such extensions of credit.

Securities Lending: In connection with both its trading and brokerage activities, Oppenheimer borrows securities to cover short sales and to complete transactions in which customers have failed to deliver securities by the required settlement date and lends securities to other brokers and dealers for similar purposes. In addition, to a limited extent, Oppenheimer acts as a 'broker-finder' whereby it stands between two broker-dealers, borrowing securities from one and lending to the other for an interest rate spread (or profit).

Discount Brokerage: Through Freedom, Oppenheimer offers online equity investing and discount brokerage services to individual investors.

ASSET MANAGEMENT

The company offers a range of investment advisory services to its retail and institutional

clients through proprietary and third party distribution channels. Clients include high-net-worth individuals and families, foundations and endowments, and trust and pension funds. Asset management capabilities include equity, fixed income, large-cap balanced and alternative investments, which are offered through vehicles, such as privately managed accounts, and retail and institutional separate accounts. The Company's asset management services include:

Separate Managed Accounts: The company provides clients with two wrap fee-based programs: Investment Advisory Services through which clients may select among those managers approved by the Company; and Strategic Asset Review th

The above Company Fundamental Report is a half-ready report and contents are subject to change.

It means that we have all necessary data in our database to prepare the report but need **2-3 days** to complete it. During this time we are also updating the report with respect to the current moment. So, you can get all the most recent data available for the same price. Please note that preparation of additional types of analyses requires extra time.

Contents

RESEARCH METHODOLOGY

DISCLAIMER

1. OPPENHEIMER HOLDINGS INC. COMPANY PROFILE

- 1.1. Key facts
- 1.2. Financial Performance
- 1.3. Key Executives
- 1.4. Ownership and Major Holders
- 1.5. Company History

2. OPPENHEIMER HOLDINGS INC. BUSINESS OVERVIEW

- 2.1. Business Description
- 2.2. Major Products and Services
- 2.3. Markets and Sales Activities
- 2.4. Locations, Subsidiaries, Operating Units

3. OPPENHEIMER HOLDINGS INC. SWOT ANALYSIS

- 3.1. Overview
- 3.2. Strengths
- 3.3. Weaknesses
- 3.4. Opportunities
- 3.5. Threats

4. OPPENHEIMER HOLDINGS INC. FINANCIAL ANALYSIS

- 4.1. Financial Statements
 - 4.1.1. Income Statement
 - 4.1.2. Balance Sheet
 - 4.1.3. Cash Flow
- 4.2. Financial Ratios
 - 4.2.1. Profitability
 - 4.2.2. Margin Analysis

- 4.2.3. Asset Turnover
- 4.2.4. Credit Ratios
- 4.2.5. Long-Term Solvency
- 4.2.6. Growth Over Prior Year
- 4.2.7. Financial Ratios Charts
- 4.3. Stock Market Snapshot

5. OPPENHEIMER HOLDINGS INC. COMPETITORS AND INDUSTRY ANALYSIS

- 5.1. Oppenheimer Holdings Inc. Direct Competitors
- 5.2. Comparison of Oppenheimer Holdings Inc. and Direct Competitors Financial Ratios
- 5.3. Comparison of Oppenheimer Holdings Inc. and Direct Competitors Stock Charts
- 5.4. Oppenheimer Holdings Inc. Industry Analysis
 - 5.4.1. Industry Snapshot
 - 5.4.2. Oppenheimer Holdings Inc. Industry Position Analysis

6. OPPENHEIMER HOLDINGS INC. NEWS & EVENTS

- 6.1. News & PR Activity Analysis
- 6.2. IR Corporate News
- 6.3. Marketing News
- 6.4. Corporate Events

7. OPPENHEIMER HOLDINGS INC. EXPERTS REVIEW¹

- 7.1. Experts Consensus
- 7.2. Experts Revisions

8. OPPENHEIMER HOLDINGS INC. ENHANCED SWOT ANALYSIS²

9. UNITED STATES PESTEL ANALYSIS²

- 9.1. Political Factors
- 9.2. Economic Factors
- 9.3. Social Factors
- 9.4. Technological Factors
- 9.5. Environmental Factors
- 9.6. Legal Factors

10. OPPENHEIMER HOLDINGS INC. IFE, EFE, IE MATRICES²

- 10.1. Internal Factor Evaluation Matrix
- 10.2. External Factor Evaluation Matrix
- 10.3. Internal External Matrix

11. OPPENHEIMER HOLDINGS INC. PORTER FIVE FORCES ANALYSIS²

12. OPPENHEIMER HOLDINGS INC. VRIO ANALYSIS²

APPENDIX: RATIO DEFINITIONS

LIST OF FIGURES

Oppenheimer Holdings Inc. Annual Revenues in Comparison with Cost of Goods Sold and Gross Profit
Profit Margin Chart
Operating Margin Chart
Return on Equity (ROE) Chart
Return on Assets (ROA) Chart
Debt to Equity Chart
Current Ratio Chart
Oppenheimer Holdings Inc. 1-year Stock Charts
Oppenheimer Holdings Inc. 5-year Stock Charts
Oppenheimer Holdings Inc. vs. Main Indexes 1-year Stock Chart
Oppenheimer Holdings Inc. vs. Direct Competitors 1-year Stock Charts
Oppenheimer Holdings Inc. Article Density Chart

1 – Data availability depends on company's security policy.

2 – These sections are available only when you purchase a report with appropriate additional types of analyses.
The complete financial data is available for publicly traded companies.

List Of Tables

LIST OF TABLES

Oppenheimer Holdings Inc. Key Facts
Profitability
Management Effectiveness
Income Statement Key Figures
Balance Sheet Key Figures
Cash Flow Statement Key Figures
Financial Performance Abbreviation Guide
Oppenheimer Holdings Inc. Key Executives
Oppenheimer Holdings Inc. Major Shareholders
Oppenheimer Holdings Inc. History
Oppenheimer Holdings Inc. Products
Revenues by Segment
Revenues by Region
Oppenheimer Holdings Inc. Offices and Representations
Oppenheimer Holdings Inc. SWOT Analysis
Yearly Income Statement Including Trends
Income Statement Latest 4 Quarters Including Trends
Yearly Balance Sheet Including Trends
Balance Sheet Latest 4 Quarters Including Trends
Yearly Cash Flow Including Trends
Cash Flow Latest 4 Quarters Including Trends
Oppenheimer Holdings Inc. Profitability Ratios
Margin Analysis Ratios
Asset Turnover Ratios
Credit Ratios
Long-Term Solvency Ratios
Financial Ratios Growth Over Prior Year
Oppenheimer Holdings Inc. Capital Market Snapshot
Oppenheimer Holdings Inc. Direct Competitors Key Facts
Direct Competitors Profitability Ratios
Direct Competitors Margin Analysis Ratios
Direct Competitors Asset Turnover Ratios
Direct Competitors Credit Ratios
Direct Competitors Long-Term Solvency Ratios
Industry Statistics

Oppenheimer Holdings Inc. Industry Position
Company vs. Industry Income Statement Analysis
Company vs. Industry Balance Sheet Analysis
Company vs. Industry Cash Flow Analysis
Company vs. Industry Ratios Comparison
Oppenheimer Holdings Inc. Consensus Recommendations¹
Analyst Recommendation Summary¹
Price Target Summary¹
Experts Recommendation Trends¹
Revenue Estimates Analysis¹
Earnings Estimates Analysis¹
Historical Surprises¹
Revenue Estimates Trend¹
Earnings Estimates Trend¹
Revenue Revisions¹

ANALYSIS FEATURES

SWOT Analysis

SWOT, which stands for Strengths, Weaknesses, Opportunities and Threats, is an analytical framework that identifies the internal and external factors that are favorable and unfavorable for a company.

Enhanced SWOT Analysis

Enhanced SWOT is a 3x3 grid that arranges strengths, weaknesses, opportunities and threats into one scheme:

How to use the strengths to take advantage of the opportunities?

How to use the strengths to reduce likelihood and impact of the threats?

How to overcome the weaknesses that obstruct taking advantage of the opportunities?

How to overcome the weaknesses that can make the threats a reality?

Upon answering these questions a company can develop a project plan to improve its business performance.

PESTEL Analysis

PESTEL (also termed as PESTLE) is an ideal tool to strategically analyze what influence different outside factors – political, economic, sociocultural, technological, environmental and legal – exert on a business to later chart its long term targets.

Being part of the external analysis when carrying out a strategic assessment or performing a market study, PESTEL gives an overview of diverse macro-environmental factors that any company should thoughtfully consider. By perceiving these outside environments, businesses can maximally benefit from the opportunities while minimizing the threats to the organization.

Key Factors Examined by PESTEL Analysis:

Political – What opportunities and pressures are brought by political bodies and what is the degree of public regulations' impact on the business?

Economic – What economic policies, trends and structures are expected to affect the organization, what is this influence's degree?

Sociological – What cultural and societal aspects will work upon the demand for the business's products and operations?

Technological – What impact do the technological aspects, innovations, incentives and barriers have on the organization?

Environmental – What environmental and ecological facets, both locally and farther afield, are likely to predetermine the business?

Legal – What laws and legislation will exert influence on the style the business is carried out?

IFE, EFE, IE Matrices

The Internal Factor Evaluation matrix (IFE matrix) is a strategic management tool helping audit or evaluate major weaknesses and strengths in a business's functional areas. In addition, IFE matrix serves as a basis for identifying and assessing relationships amongst those areas. The IFE matrix is utilised in strategy formulation.

The External Factor Evaluation matrix (EFE matrix) is a tool of strategic management that is typically utilised to assess current market conditions. It is an ideal instrument for visualising and prioritising the threats and opportunities a firm is facing.

The essential difference between the above mentioned matrices lies in the type of factors incorporated in the model; whilst the latter is engaged in internal factors, the former deals exceptionally with external factors – those exposed to social, political, economic, legal, etc. external forces.

Being a continuation of the EFE matrix and IFE matrix models, the Internal External matrix (IE matrix) rests upon an investigation of external and internal business factors

integrated into one suggestive model.

Porter Five Forces Analysis

The Porter's five forces analysis studies the industry of operation and helps the company find new sources of competitive advantage. The analysis surveys an industry through five major questions:

What composes a threat of substitute products and services?

Is there a threat of new competitors entering the market?

What is the intensity of competitive rivalry?

How big is the bargaining power of buyers?

How significant is the bargaining power of suppliers?

VRIO Analysis

VRIO stands for Value, Rarity, Imitability, Organization. This analysis helps to evaluate all company's resources and capabilities and bring them together into one aggregate table that includes:

Tangible resources

Financial

Physical

Technological

Organizational

Intangible resources

Human

Innovation and Creativity

Reputation

Organizational capabilities

The result of the analysis gives a clear picture of company's competitive and economic implications, answering the questions if the resources mentioned above are:

Valuable?

Rare?

Costly to imitate?

Organized properly?

I would like to order

Product name: Oppenheimer Holdings Inc. Fundamental Company Report Including Financial, SWOT, Competitors and Industry Analysis

Product link: <https://marketpublishers.com/r/OF41030DA50BEN.html>

Price: US\$ 499.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

info@marketpublishers.com

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/OF41030DA50BEN.html>