Estimates (Apr) (US$)	2022A	2023A	2024E	2025E	2026E
EPS	5.61	5.29	5.19	5.45	5.89
GAAP EPS	3.73	2.82	3.34	4.01	4.42
EPS Change (YoY)	26.4%	-5.7%	-1.9%	5.0%	8.1%
Consensus EPS (Bloomberg)			5.17	5.44	5.86
DPS	2.50	2.71	2.82	2.98	3.14
Valuation (Apr)					
P/E	15.3x	16.2x	16.5x	15.8x	14.6x
GAAP P/E	23.0x	30.4x	25.7x	21.4x	19.4x
Dividend Yield	2.9%	3.2%	3.3%	3.5%	3.7%
EV / EBITDA*	12.0x	12.8x	12.8x	12.1x	11.5x
Free Cash Flow Yield*	5.2%	4.0%	4.5%	5.9%	6.1%

* For full definitions of *iQmethod*SM measures, see page 4.