

Advanced Medical Solutions Group PLC (AMS:LN)



London
Stock Exchange

Health Care/Medical Supplies

Price: 183.40

Report Date: April 15, 2024

Business Description and Key Statistics

Advanced Medical Solutions Group plc is a United Kingdom-based company that specializes in the design, development, manufacture and distribution of novel tissue-healing technologies, including advanced wound care products, surgical dressings and medical grade materials, as well as medical adhesives and sutures for closing and sealing tissue. The Company manufactures a range of products and materials that include silver alginates, alginates, foams, tissue adhesives, sutures and haemostats. It operates through two divisions for its sales, marketing and research and development (R&D) activities, including Surgical and Woundcare. Its surgical business unit is focused on selling and marketing its branded products and are sold directly and through distributors. Its Woundcare business unit is focused on distribution and marketing its products that are supplied to medical device partners under their own brands. The Company offers its products under ActivHeal, LiquiBand and RESORBA.

Website: <https://www.admedsol.com/>

ICB Industry: Health Care

ICB Subsector: Medical Supplies

Address: Premier Park, 33 Road One
WINSFORD CW7 3RT
GBR

Employees: 800

	Current	YTY % Chg
Revenue LFY (M)	126	1.5
EPS Diluted LFY	0.07	-22.0
Market Value (M)	399	
Shares Outstanding LFY (000)	217,329	
Book Value Per Share	1.12	
EBITDA Margin %	19.20	
Net Margin %	12.8	
Long-Term Debt / Capital %	3.2	
Dividends and Yield TTM	0.02 - 1.21%	
Payout Ratio TTM %	30.1	
60-Day Average Volume (000)	516	
52-Week High & Low	258.00 - 177.20	
Price / 52-Week High & Low	0.71 - 1.03	

Price, Moving Averages & Volume



Advanced Medical Solutions Group PLC is currently trading at 183.40 which is 8.3% below its 50 day moving average price of 199.99 and 12.2% below its 200 day moving average price of 208.77.

AMS:LN is currently 28.9% below its 52-week high price of 258.00 and is 3.5% above its 52-week low price of 177.20. Over the past 52-weeks, AMS:LN is down 23.4% while on a calendar year-to-date basis it is down 11.6%.

The Relative Strength Index (RSI) indicator for AMS:LN is currently 41.04. An RSI value of 70 and above is considered overbought and 30 and below oversold.

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Price Performance, Technical Indicators & Risk Metrics

Price Performance	% Change	Difference vs FTSE 350	Technical Indicators	
1-Day %	2.34	2.68	50-Day Average Price	199.99
1-Week %	1.89	1.76	Price / 50-Day Average	0.92
4-Week %	-10.54	-13.16	200-Day Average Price	208.77
52-Week %	-23.42	-24.78	Price / 200-Day Average	0.88
Quarter-to-Date %	-6.43	-6.44	RSI - Relative Strength Index	41.04
Year-to-Date %	-11.61	-14.19	Risk Metrics	
Last Month %	-6.67	-10.92	Price Volatility	4.34
Last Quarter %	-5.54	-8.11	Sharpe Ratio	-0.07
Last Calendar Year %	-19.88	-23.76	Sortino Ratio	-0.12

5-Year Price Performance vs. FTSE 350

Advanced Medical Solutions Group PLC
FTSE 350 Index

Current: 0.56 CAGR: -11.0%
Current: 1.06 CAGR: 1.1%



Over the past five years, Advanced Medical Solutions Group PLC's stock price is down 44.2% which is 50.0% below the FTSE 350 Index performance of 5.8% over the same period. Advanced Medical Solutions Group PLC's cumulative annualized growth rate (CAGR) over the five year period has been -11.0% while that of the FTSE 350 Index has been 1.1%.

Over the past year, Advanced Medical Solutions Group PLC's stock price performance of -23.4% has underperformed that of the FTSE 350 Index by 24.8%. On a year-to-date basis, Advanced Medical Solutions Group PLC's stock price performance of -11.6% has underperformed the FTSE 350 Index by 14.2%.

Over the past week, Advanced Medical Solutions Group PLC's stock price performance of 1.9% has outperformed that of the FTSE 350 Index by 1.8%.

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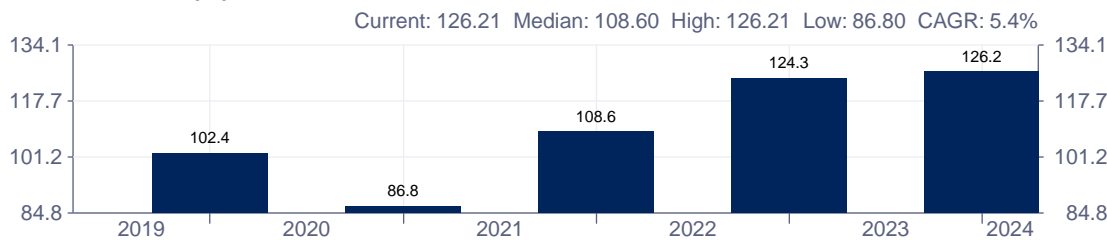
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Growth and Profitability Metrics

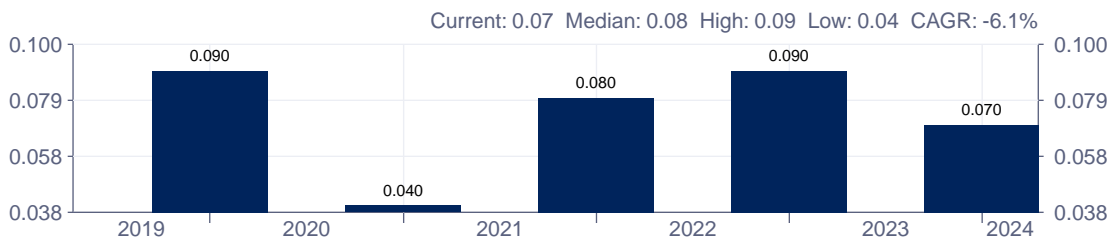
Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %	13.3	4.2	7.8	Gross Margin %	55.6	56.9	57.9
Revenues Per Share %	12.9	3.9	7.3	EBITDA Margin %	19.2	23.3	25.2
EBITDA %	17.5	-4.3	5.0	Pre-Tax Margin %	16.8	19.3	22.2
EPS Diluted %	22.6	-7.1	2.9	Net Margin %	12.8	15.5	18.2
Free Cash Flow %	-46.6	-31.0	-15.0	Return on Equity %	6.6	8.1	11.2
Cash from Operations %	-16.9	-9.6	-1.3	Return on Capital %	6.5	7.9	11.2
Book Value %	6.2	6.8	10.4	Return on Assets %	5.6	7.0	10.0

Revenue (M)



Advanced Medical Solutions Group PLC's cumulative annualized revenue growth rate over the charted period is 5.4%. This compares to cumulative annualized growth of 13.3% over the past 3 years.

EPS Diluted



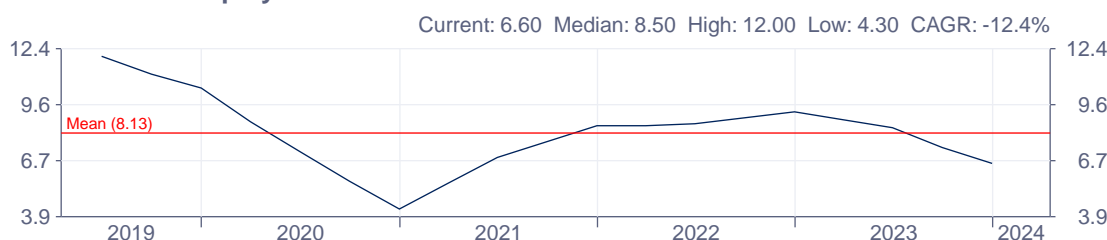
Advanced Medical Solutions Group PLC's cumulative annualized EPS growth rate over the charted period is -6.1%. This compares to cumulative annualized growth of 22.6% over the past 3 years.

Net Profit Margin %



Advanced Medical Solutions Group PLC's net profit margin of 12.8% is 2.7% below the period's mean net margin of 15.5%. During the charted period, the observed net profit margin high and low were 20.2% and 10.0% respectively.

Return on Equity %



Advanced Medical Solutions Group PLC's return on equity of 6.6% is 1.5% below the period's mean return on equity of 8.1%. During the charted period, the observed ROE high and low were 12.0% and 4.3% respectively.

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Valuation Metrics

	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	24.9	32.1	30.0	Earnings Yield %	4.01	3.12	3.33
Price / Sales	3.2	5.4	5.6	Free Cash Flow Yield %	0.31	1.50	1.59
Price / Operating Cash Flow	18.7	27.3	26.5	Dividend Yield %	1.21	0.65	0.49
Price / Book Value	1.6	2.7	3.1	Enterprise Value / EBITDA	14.3	19.4	19.2

Price / EPS TTM



Advanced Medical Solutions Group PLC is trading at 24.94 times its EPS generated during the latest fiscal year. This multiple is below the historically observed median of 32.08, while high and low observations have been 60.90 and 20.02.

Price / Sales



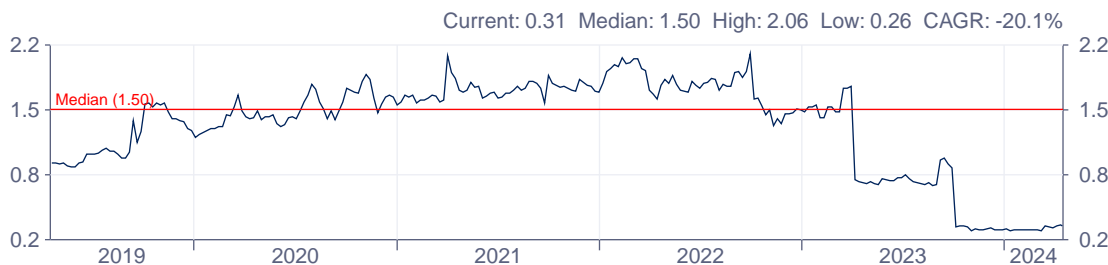
Advanced Medical Solutions Group PLC is trading at a Price to Sales ratio of 3.19 based on sales generated during the latest fiscal year. This ratio is below the historically observed median ratio of 5.42, while high and low observations have been 7.23 and 3.09.

Price / Book Value



Advanced Medical Solutions Group PLC is trading at a Price to Book ratio of 1.63 based on book value at the latest fiscal year end. This ratio is below the historically observed median of 2.69, while high and low observations have been 4.26 and 1.59.

Free Cash Flow Yield %



Advanced Medical Solutions Group PLC has a Free Cash Flow Yield of 0.31% based on free cash flow generated during the latest fiscal year. This value is below the historically observed median yield of 1.50%, while high and low observations have been 2.06 and 0.26.

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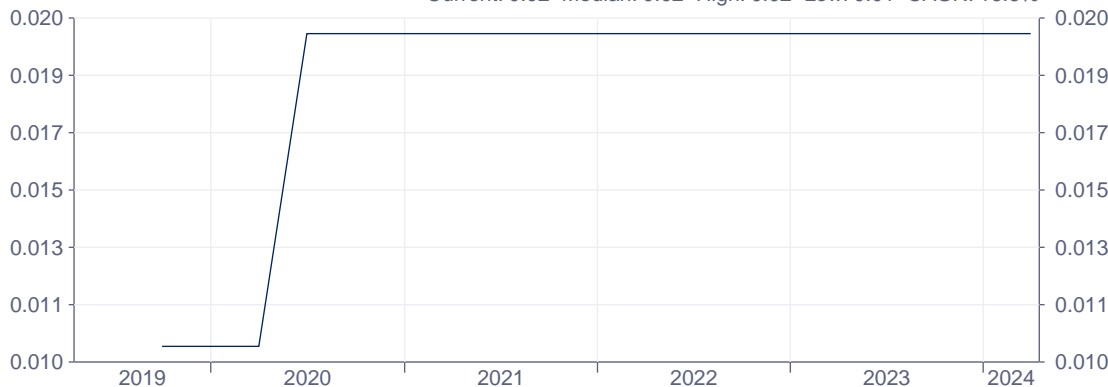
Dividends Data

Dividends Per Share TTM		0.02	Payout Ratio TTM %		30.05%	Dividend Yield TTM %		1.21%
Rate	Ex Date	Record Date	Payment Date	Currency	Note			
0.017	30-05-2024	31-05-2024	21-06-2024	GBP				
0.007	28-09-2023	29-09-2023	27-10-2023	GBP				
0.015	18-05-2023	19-05-2023	09-06-2023	GBP				
0.006	29-09-2022	30-09-2022	21-10-2022	GBP				
0.014	26-05-2022	27-05-2022	17-06-2022	GBP				
0.006	23-09-2021	24-09-2021	22-10-2021	GBP				
0.012	27-05-2021	28-05-2021	18-06-2021	GBP				
0.005	24-09-2020	25-09-2020	23-10-2020	GBP				
0.011	28-05-2020	29-05-2020	19-06-2020	GBP				
0.005	26-09-2019	27-09-2019	25-10-2019	GBP				
0.009	23-05-2019	24-05-2019	14-06-2019	GBP				
0.004	27-09-2018	28-09-2018	26-10-2018	GBP				

Dividend Growth and Yield

Dividends Per Share TTM

Current: 0.02 Median: 0.02 High: 0.02 Low: 0.01 CAGR: 16.6%



Advanced Medical Solutions Group PLC's trailing 12-month dividend per share is 0.02 and its dividend has grown at a cumulative annualized rate of 16.6% over the charted period. This compares to dividend growth of 9.80% over the past year and cumulative annualized growth of 11.60% over the past 3 years.

Dividend Yield TTM %

Current: 1.21 Median: 0.65 High: 1.23 Low: 0.34 CAGR: 27.5%



Advanced Medical Solutions Group PLC's current dividend yield is 1.21% based on trailing 12 month dividends. The current yield is above the historically observed median of 0.65% and, over the charted time period, the observed high yield has been 1.23% and the observed low yield has been 0.34%.

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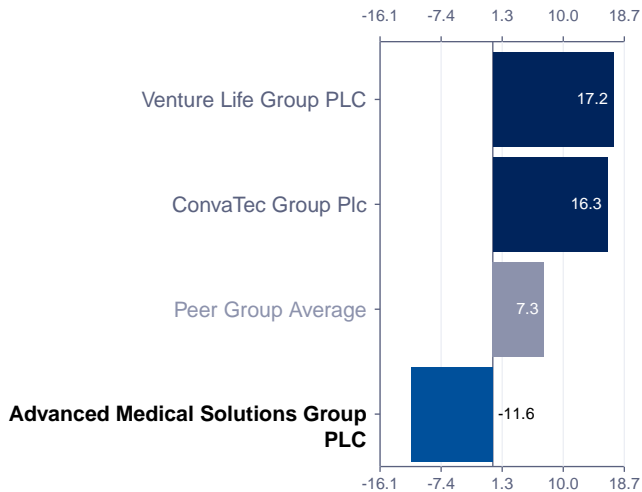
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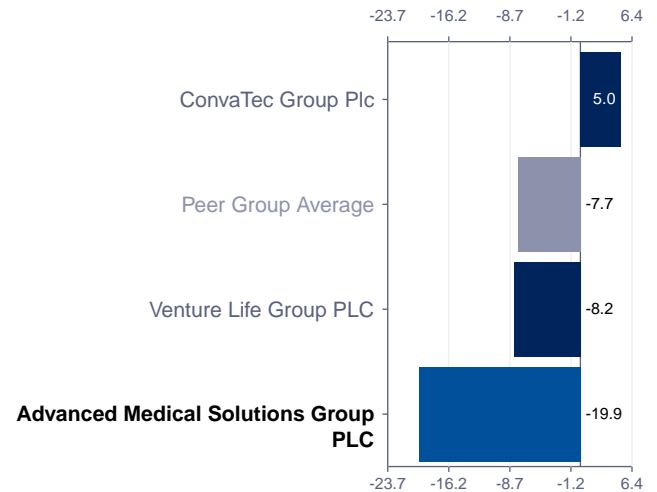
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ICB Subsector Peer Comparisons

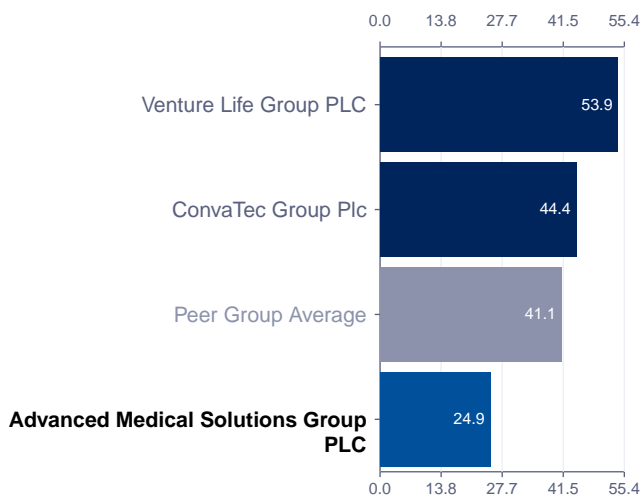
Price Change Year to Date %



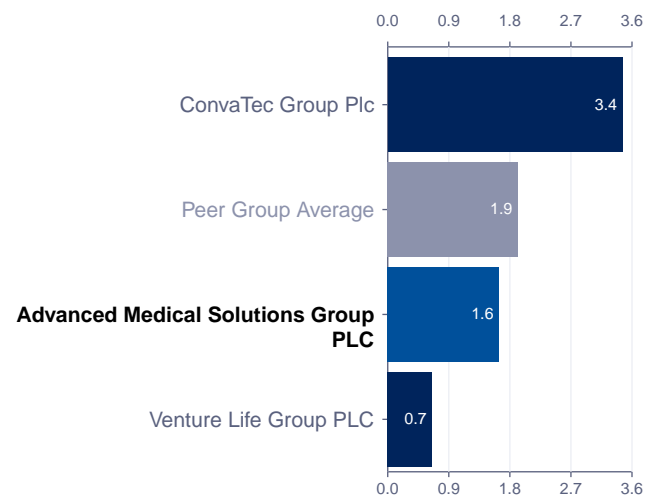
Price Change Last Calendar Year %



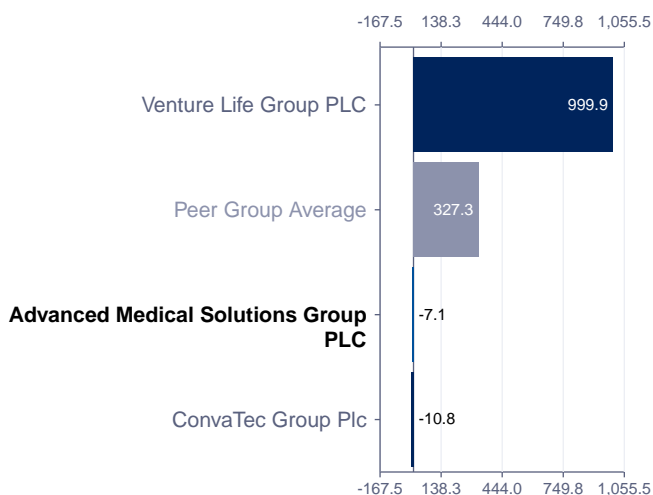
Price / EPS TTM



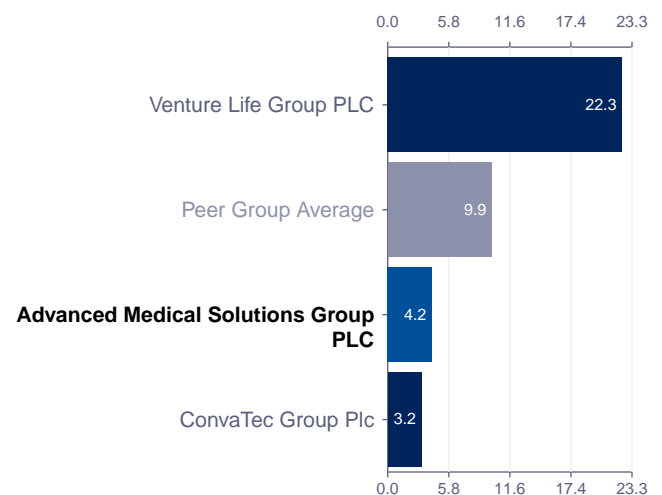
Price / Book Value



EPS 5-Year Growth Rate %



Revenue 5-Year Growth Rate %



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Abbreviations:

CAGR	- Cumulative annual growth rate.
EBIT	- Earnings before interest and taxes.
EBITDA	- Earnings before interest, taxes, depreciation & amortization.
LFY	- Last fiscal year
M	- Million
LON	- London Stock Exchange

Definitions:

Market Value - Weekly Price times latest Shares Outstanding times any applicable ADR factor.

Revenue - Sum of the last four quarters of Revenues.

Revenue Per Share - Sum of the last four quarters of Total Revenue divided by Weighted Average Shares Outstanding.

Operating EPS LFY - EPS excluding non-recurring, non-operating items, fiscal year aligned TTM value.

60-Day Average Volume (000) - The average of the last 60 daily volume values in thousands of shares.

Price 52-Week High - The high closing price from the last 52 weeks of daily closing prices.

Price 52-Week Low - The low closing price from the last 52 weeks of daily closing prices.

Price / 52-Week High - Latest price divided by the high price from the past 52 weeks of daily closing prices.

Price / 52-Week Low - Latest price divided by the low price from the past 52 weeks of daily closing prices.

50-Day Average Price - Mean of last 50 daily closing prices.

200-Day Average Price - Mean of last 200 daily closing prices.

Price / 50-Day Average Price - Latest closing price divided by mean of last 50 daily closing prices, as a percentage.

Price / 200-Day Average Price - Latest closing price divided by mean of last 200 daily closing prices, as a percentage.

Relative Strength Index - Relative Strength Index or RSI measures the magnitude of gains over a given time period against the magnitude of losses over that period. The equation is $RSI = 100 - 100 / (1 + RS)$ where $RS = (\text{total gains} / n) / (\text{total losses} / n)$ and n = number of RSI periods. In this item, 14 days is used and one year of daily prices are considered. A value of 30 or below may imply oversold and 70 or above may imply overbought.

Price Volatility - The standard deviation of the last 20 days of daily closing prices.

Sharpe Ratio - The 5 year average of the excess monthly return over the risk - free rate(1 - month T - bill) over the 5 year standard deviation of the same series.

Sortino Ratio - The same calculation as the Sharpe Ratio but with positive excess returns set to zero for the standard deviation denominator, so only negative volatility weighs in.

Dividends Per Share TTM - Sum of the last four quarters of Dividends Per Share.

Payout Ratio - Dividends Per Share TTM divided by Operating EPS TTM.

Dividend Yield TTM % - Sum of the last four quarter of Dividends Per Share divided by Weekly Price.

EBITDA - Sum of the last four quarters of EBITDA (Operating Income + Depreciation & Amortization).

Free Cash Flow - Sum of the last four quarters Net Cash from Operations minus Capital Expenditures (Purchase of Property, Plant & Equipment), from the Cash Flow Statement.

Book Value Per Share - Total Common Equity last quarter divided by Shares Outstanding last quarter.

Gross Margin % - Sum of the last four quarters Gross Profit divided by the sum of the last four quarters Revenues.

EBITDA Margin % - Sum of the last four quarters EBITDA divided by the sum of the last four quarters Revenues.

Pre-Tax Margin % - Sum of the last four quarters of Earnings Before Taxes divided by sum of the last four quarters Revenues.

Net Profit Margin % - Sum of the last four quarters of Operating EPS divided by sum of the last four quarters Revenues Per Share.

Return on Equity % - Sum of the last four quarters of Operating EPS divided by the average of the last four quarters Book Value.

Return on Capital % - Sum of the last four quarters of Operating EPS divided by the average of the last four quarters Total Capital Per Share.

Return on Assets % - Sum of the last four quarters of Operating EPS divided by the average of the last four quarters Total Assets Per Share.

Price / EPS TTM - Weekly Price divided by the sum of the last four quarters of Operating EPS (capped at 99.9).

Price / Sales - Weekly Price divided by Revenues Per Share TTM.

Price / Book Value - Weekly Price divided by Book Value Per Share last quarter. Book Value Per Share is Total Common Equity last quarter divided by Shares Outstanding last quarter (capped at 49.9).

Free Cash Flow Yield % - Free Cash Flow Per Share TTM divided by Weekly Price.

Enterprise Value - Market Value plus Total Debt last year plus Preferred Equity last year minus Cash & Cash Equivalents last year.

Enterprise Value / Sales - Enterprise Value divided by the sum of the last four quarters of Revenue.

Enterprise Value / EBITDA - Enterprise Value divided by EBITDA TTM.

Enterprise Value / EBIT - Enterprise Value divided by trailing four quarters of Operating Income.

Enterprise Value / Free Cash Flow - Enterprise Value divided by the sum of the last four quarters of Free Cash Flow.

Russell 1000 Index - The largest 1,000 stocks by market cap, the index comprehensively covers the US large cap universe.

EPS 5-Year Growth Rate % is capped at 999.9%.

Revenue 5-Year Growth Rate % is capped at 999.9%.

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