

Bellway plc (BWY:LN)



London
Stock Exchange

Consumer Discretionary/Home Construction

Price: 19.73

Report Date: April 23, 2026

Business Description and Key Statistics

Bellway p.l.c. is a United Kingdom-based home construction company engaged in the building and selling of homes, ranging from one-bedroom apartments up to six-bedroom family homes, as well as providing social housing-to-housing associations. The Company operates in approximately 20 divisions, covering centers across England, Scotland and Wales. The Company's brands include Bellway, Ashberry brand and Bellway London. The Bellway brand is engaged in building quality homes in selected locations inspired by the needs of families. The Ashberry brand is offered on larger sites, and it also provides two differentiated outlets, offering choice to its customers. The Bellway London brand covers all developments in London boroughs and commuter towns. Its properties range from one-bedroom apartments to four-bedroom houses. The Company's subsidiaries include Bellway Homes Limited, Bellway Housing Trust Limited, Bellway Properties Limited, Bellway (Services) Limited and Litrose Investments Limited.

Website: <https://www.bellwayplc.co.uk/>

ICB Industry: Consumer Discretionary

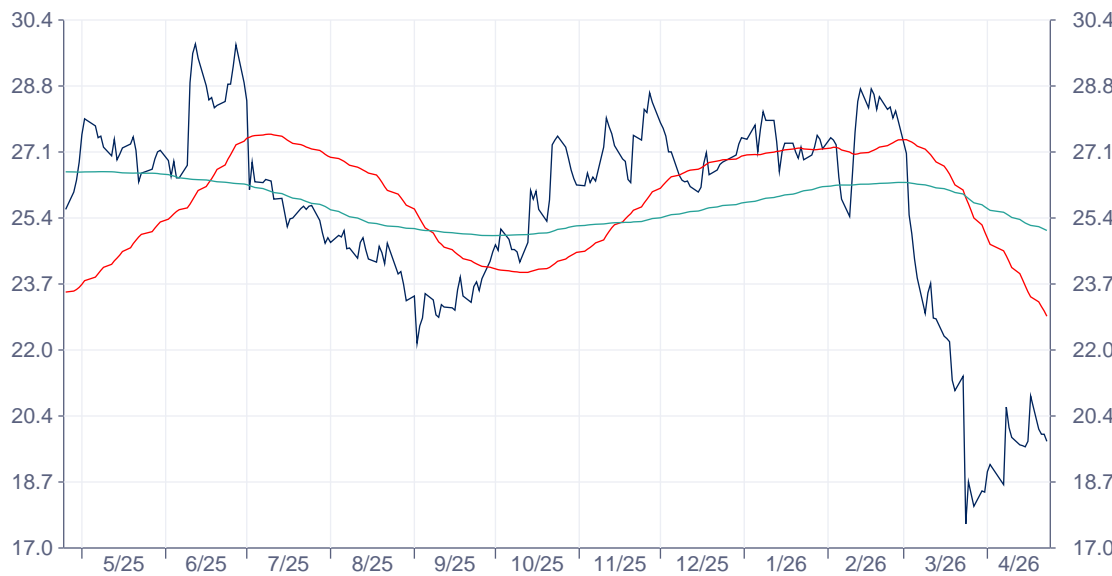
ICB Subsector: Home Construction

Address: Woosington House, Woosington
NEWCASTLE UPON TYNE NE13 8BF
GBR

Employees: 2,746

	Current	YTY % Chg
Revenue LFY (M)	2,783	13.3
EPS Diluted LFY	1.32	20.0
Market Value (M)	2,313	
Shares Outstanding LFY (000)	117,241	
Book Value Per Share	30.05	
EBITDA Margin %	8.30	
Net Margin %	6.8	
Long-Term Debt / Capital %	3.6	
Dividends and Yield TTM	0.72 - 3.55%	
Payout Ratio TTM %	43.0	
60-Day Average Volume (000)	710	
52-Week High & Low	29.82 - 17.63	
Price / 52-Week High & Low	0.66 - 1.12	

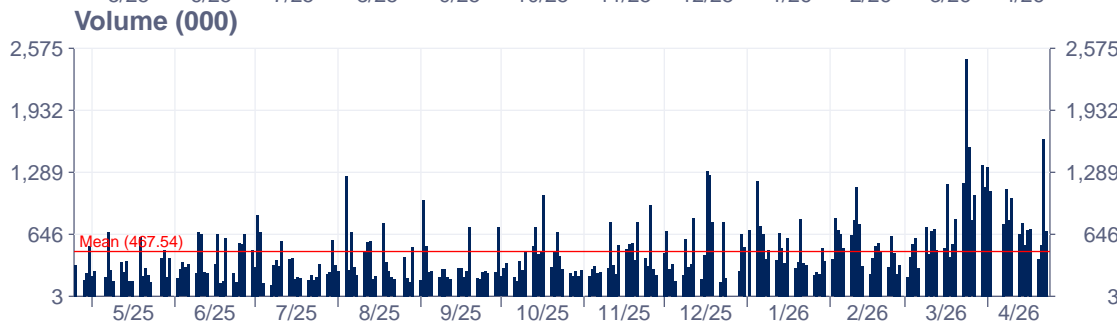
Price, Moving Averages & Volume



Bellway plc is currently trading at 19.73 which is 13.9% below its 50 day moving average price of 22.91 and 21.3% below its 200 day moving average price of 25.08.

BWY:LN is currently 33.8% below its 52-week high price of 29.82 and is 11.9% above its 52-week low price of 17.63. Over the past 52-weeks, BWY:LN is down 23.1% while on a calendar year-to-date basis it is down 28.1%.

The Relative Strength Index (RSI) indicator for BWY:LN is currently 42.89. An RSI value of 70 and above is considered overbought and 30 and below oversold.



— Price — Price (50-Day Simple Moving Average) — Price (200-Day Simple Moving Average)

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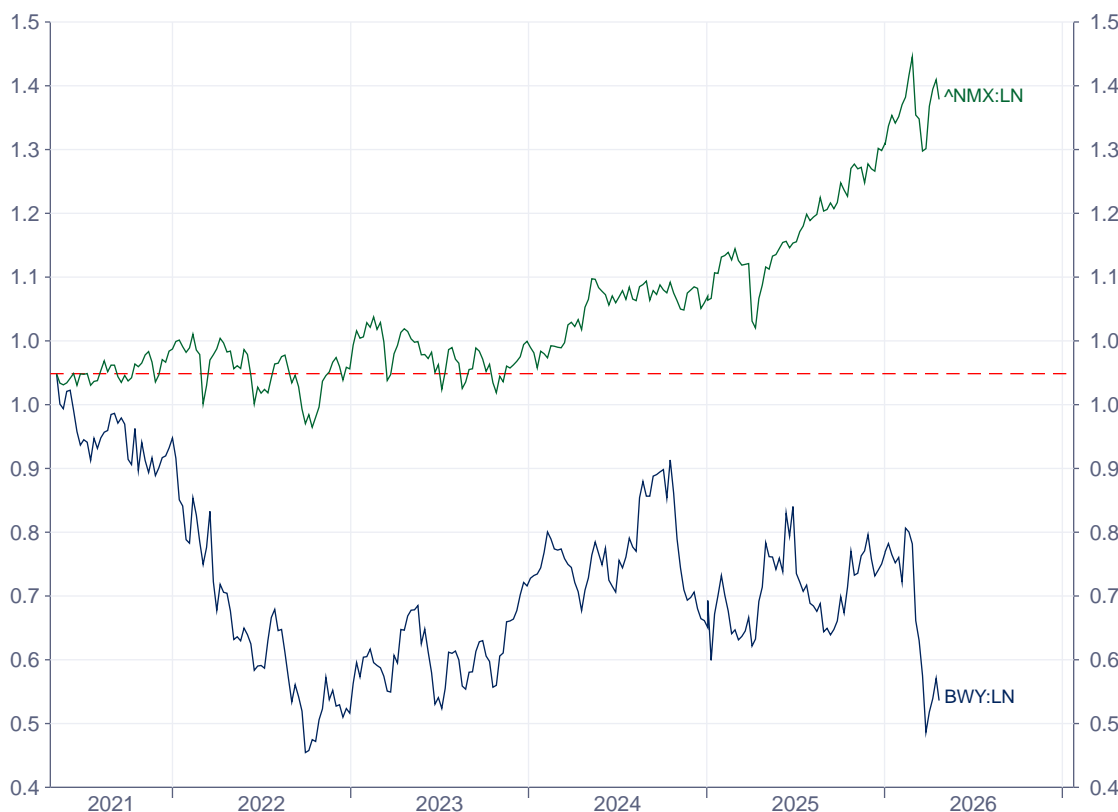
Price Performance, Technical Indicators & Risk Metrics

Price Performance	% Change	Difference vs FTSE 350	Technical Indicators	
1-Day %	-0.90	-0.64	50-Day Average Price	22.91
1-Week %	0.00	1.13	Price / 50-Day Average	0.86
4-Week %	11.91	6.69	200-Day Average Price	25.08
52-Week %	-23.05	-46.57	Price / 200-Day Average	0.79
Quarter-to-Date %	7.00	3.78	RSI - Relative Strength Index	42.89
Year-to-Date %	-28.10	-32.95	Risk Metrics	
Last Month %	-33.81	-26.66	Price Volatility	0.78
Last Quarter %	-32.80	-34.38	Sharpe Ratio	-0.09
Last Calendar Year %	10.11	-9.81	Sortino Ratio	-0.13

5-Year Price Performance vs. FTSE 350

Bellway plc
FTSE 350 Index

Current: 0.54 CAGR: -11.8%
Current: 1.39 CAGR: 6.8%



Over the past five years, Bellway plc's stock price is down 46.2% which is 85.0% below the FTSE 350 Index performance of 38.8% over the same period. Bellway plc's cumulative annualized growth rate (CAGR) over the five year period has been -11.8% while that of the FTSE 350 Index has been 6.8%.

Over the past year, Bellway plc's stock price performance of -23.0% has underperformed that of the FTSE 350 Index by 46.6%. On a year-to-date basis, Bellway plc's stock price performance of -28.1% has underperformed the FTSE 350 Index by 33.0%.

Over the past week, Bellway plc's stock price performance of 0.0% has outperformed that of the FTSE 350 Index by 1.1%.

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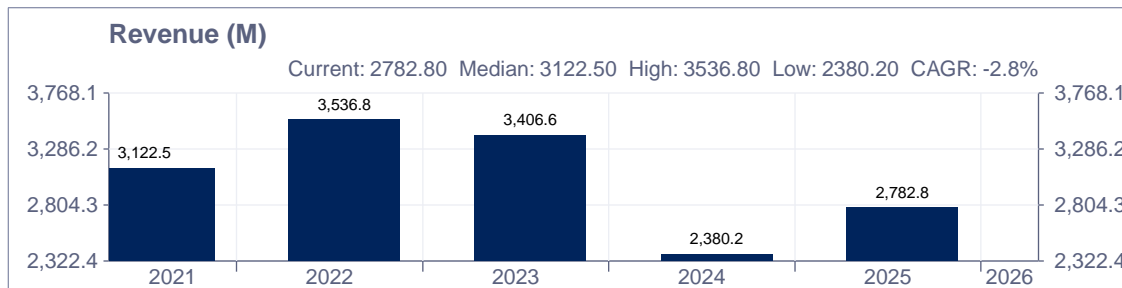
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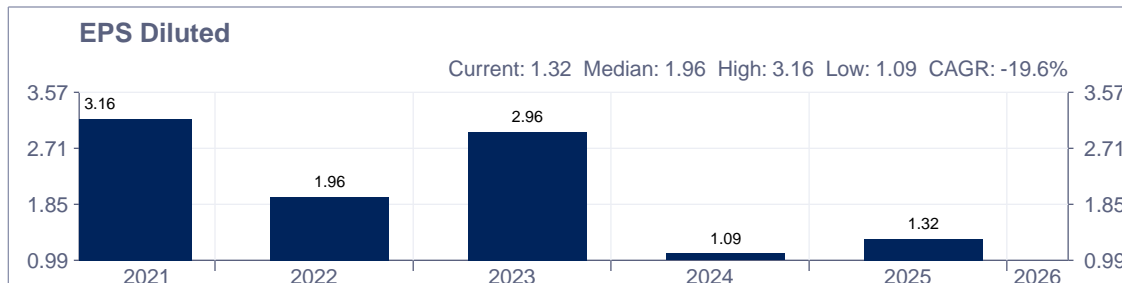
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Growth and Profitability Metrics

Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %	-6.9	3.6	3.6	Gross Margin %	16.4	19.0	21.5
Revenues Per Share %	-5.9	4.3	3.9	EBITDA Margin %	8.3	11.1	15.6
EBITDA %	-8.6	0.6	-5.8	Pre-Tax Margin %	7.7	10.5	15.0
EPS Diluted %	-22.7	-7.3	-5.1	Net Margin %	6.8	10.3	13.4
Free Cash Flow %	-32.8	-28.1	-5.3	Return on Equity %	5.5	9.5	14.4
Cash from Operations %	-30.5	-26.8	-4.5	Return on Capital %	5.3	9.2	14.3
Book Value %	2.2	3.2	8.1	Return on Assets %	3.8	6.7	10.2



Bellway plc's cumulative annualized revenue growth rate over the charted period is -2.8%. This compares to cumulative annualized growth of -6.9% over the past 3 years.



Bellway plc's cumulative annualized EPS growth rate over the charted period is -19.6%. This compares to cumulative annualized growth of -22.7% over the past 3 years.



Bellway plc's net profit margin of 6.8% is 3.5% below the period's mean net margin of 10.3%. During the charted period, the observed net profit margin high and low were 14.6% and 6.1% respectively.



Bellway plc's return on equity of 5.5% is 4.0% below the period's mean return on equity of 9.5%. During the charted period, the observed ROE high and low were 14.3% and 4.2% respectively.

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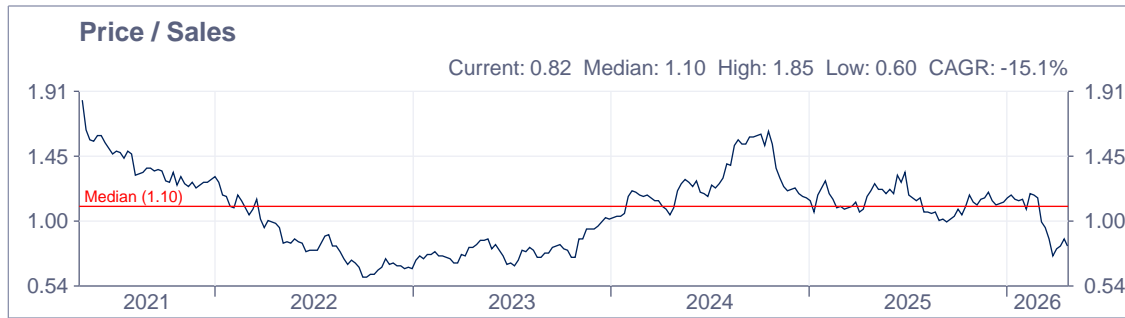
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Valuation Metrics

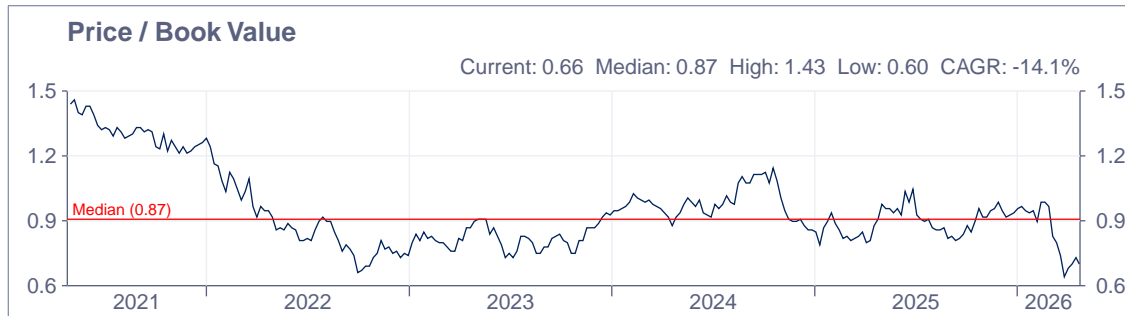
	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	12.1	10.8	8.4	Earnings Yield %	8.26	9.29	11.93
Price / Sales	0.8	1.1	1.2	Free Cash Flow Yield %	1.53	1.09	2.19
Price / Operating Cash Flow	11.9	10.7	8.3	Dividend Yield %	3.55	4.42	4.00
Price / Book Value	0.7	0.9	1.1	Enterprise Value / EBITDA	9.9	8.9	7.0



Bellway plc is trading at 12.11 times its EPS generated during the latest fiscal year. This multiple is above the historically observed median of 10.67, while high and low observations have been 26.60 and 4.48.



Bellway plc is trading at a Price to Sales ratio of 0.82 based on sales generated during the latest fiscal year. This ratio is below the historically observed median ratio of 1.10, while high and low observations have been 1.85 and 0.60.



Bellway plc is trading at a Price to Book ratio of 0.66 based on book value at the latest fiscal year end. This ratio is below the historically observed median of 0.87, while high and low observations have been 1.43 and 0.60.



Bellway plc has a Free Cash Flow Yield of 1.53% based on free cash flow generated during the latest fiscal year. This value is above the historically observed median yield of 1.09%, while high and low observations have been 5.48 and 0.00.

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Dividends Data

Dividends Per Share TTM	0.72	Payout Ratio TTM %	42.96%	Dividend Yield TTM %	3.55%
Rate	Ex Date	Record Date	Payment Date	Currency	Note
0.230	21-05-2026	22-05-2026	01-07-2026	GBP	
0.490	04-12-2025	05-12-2025	14-01-2026	GBP	
0.210	22-05-2025	23-05-2025	01-07-2025	GBP	
0.380	28-11-2024	29-11-2024	08-01-2025	GBP	
0.160	23-05-2024	24-05-2024	01-07-2024	GBP	
0.950	30-11-2023	01-12-2023	10-01-2024	GBP	
0.450	25-05-2023	26-05-2023	03-07-2023	GBP	
0.950	01-12-2022	02-12-2022	11-01-2023	GBP	
0.450	19-05-2022	20-05-2022	01-07-2022	GBP	
0.825	02-12-2021	03-12-2021	12-01-2022	GBP	
0.350	20-05-2021	21-05-2021	01-07-2021	GBP	
0.500	26-11-2020	27-11-2020	08-01-2021	GBP	

Dividend Growth and Yield

Dividends Per Share TTM



Bellway plc's trailing 12-month dividend per share is 0.70 and its dividend has grown at a cumulative annualized rate of -4.5% over the charted period. This compares to dividend growth of 22.00% over the past year and cumulative annualized growth of -19.90% over the past 3 years.

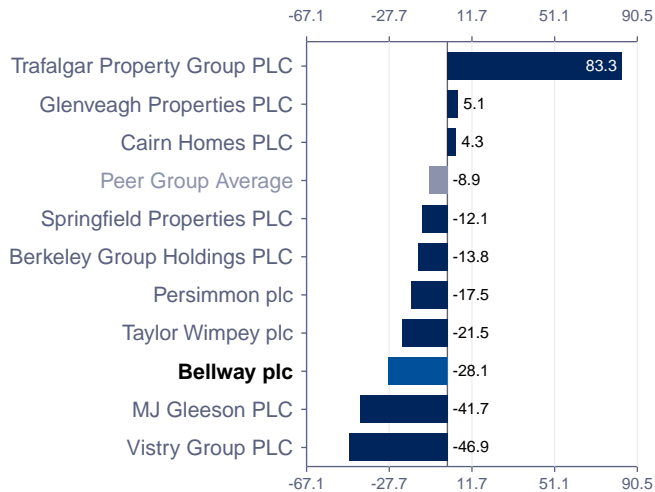
Dividend Yield TTM %



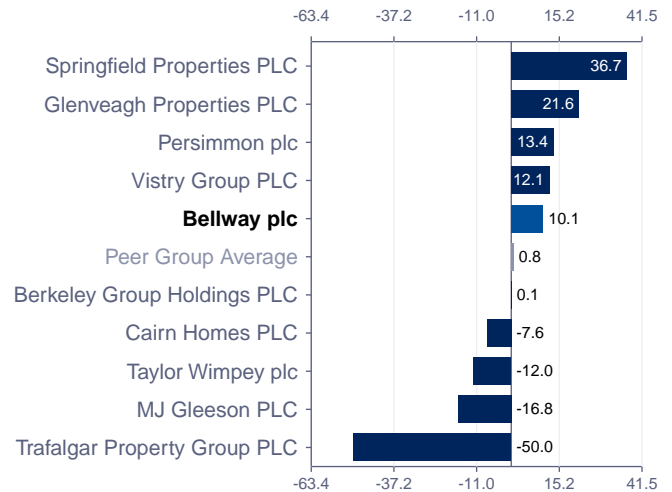
Bellway plc's current dividend yield is 3.55% based on trailing 12 month dividends. The current yield is below the historically observed median of 4.43% and, over the charted time period, the observed high yield has been 7.49% and the observed low yield has been 1.36%.

ICB Subsector Peer Comparisons

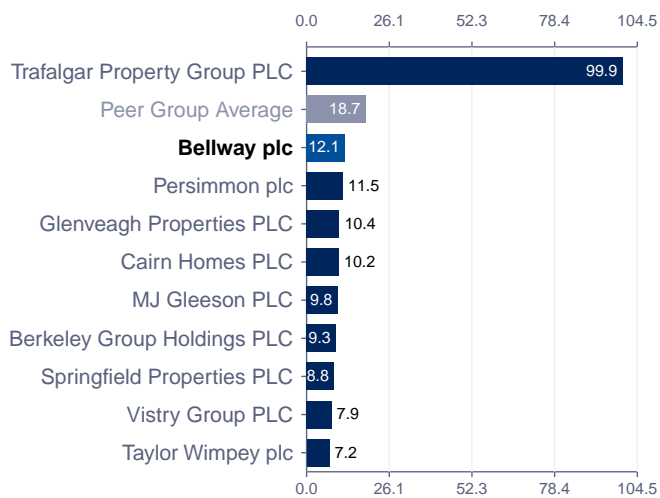
Price Change Year to Date %



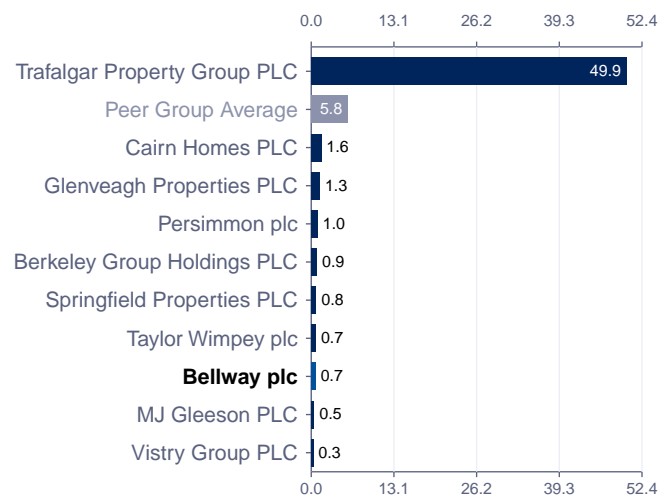
Price Change Last Calendar Year %



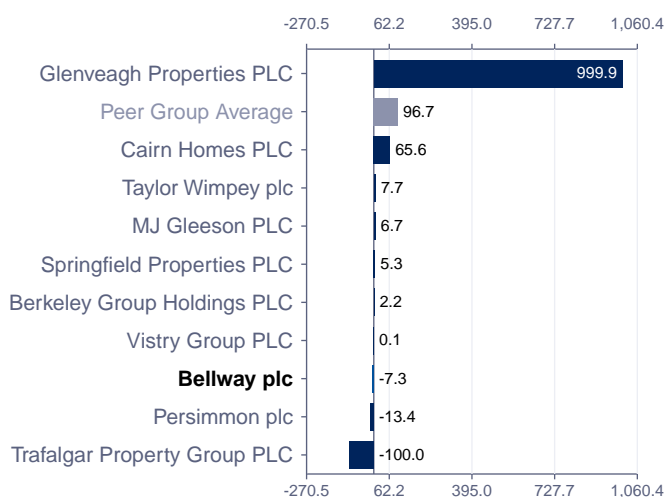
Price / EPS TTM



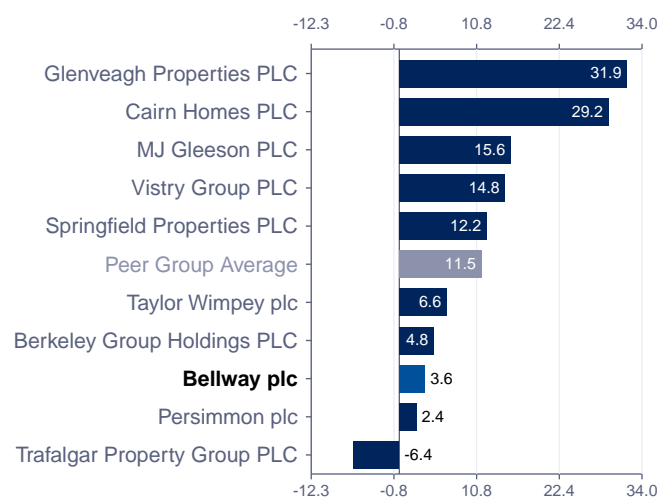
Price / Book Value



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.

Normalized 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 $n = \text{number of RSI periods}$. 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 Normalized 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 Normalized EPS divided by sum of the last four quarters Revenues Per Share.

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

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

Return on Assets % - Sum of the last four quarters of Normalized 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 Normalized 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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