

B&M European Value Retail SA (BME:LN)



Consumer Discretionary/Diversified Retailers

Price: 242.10

Report Date: September 12, 2025

Business Description and Key Statistics

B&M European Value Retail SA is a Luxembourg-based holding company of the Group. The Company's principal activity of the Group is variety retailing in the United Kingdom (UK) with 707 stores and France. The Company reports three segments: UK B&M; UK Heron and France Babou. The Company's stores are in modern retail parks, town centres, and local shopping parades and precincts. The Company's branded B&M, Heron Foods and Babou stores offer a limited assortment within each of its products in food, grocery, and general merchandise ranges. The products are mainly sourced direct from manufacturers. In the UK retail market, B&M operates over 650 stores, and The Heron Foods chain has around 290 convenience stores. In the French retail market, Babou operates around 100 stores with the general merchandise, clothing, and footwear.

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

ICB Industry: Consumer Discretionary

ICB Subsector: Diversified Retailers

Address: 3, rue Gabriel Lippmann
MUNSBACH 5365
LUX

Employees: 39,548

	Current	YTY % Chg
Revenue LFY (M)	5,571	1.6
EPS Diluted LFY	0.32	-14.0
Market Value (M)	2,430	
Shares Outstanding LFY (000)	1,003,822	
Book Value Per Share	0.75	
EBITDA Margin %	12.60	
Net Margin %	5.7	
Long-Term Debt / Capital %	74.7	
Dividends and Yield TTM	0.15 - 6.20%	
Payout Ratio TTM %	47.0	
60-Day Average Volume (000)	5,907	
52-Week High & Low	4.30 - 2.17	
Price / 52-Week High & Low	0.56 - 1.12	
Beta 5-Year vs. S&P 500		

Price, Moving Averages & Volume



B&M European Value Retail SA is currently trading at 242.10 which is 10,115.2% above its 50 day moving average price of 2.37 and 8,191.1% above its 200 day moving average price of 2.92.

BME:LN is currently 5,531.5% above its 52-week high price of 4.30 and is 11,077.3% above its 52-week low price of 2.17. Over the past 52-weeks, BME:LN is down 43.2% while on a calendar year-to-date basis it is down 34.0%.

The Relative Strength Index (RSI) indicator for BME:LN is currently 54.59. An RSI value of 70 and above is considered overbought and 30 and below oversold.

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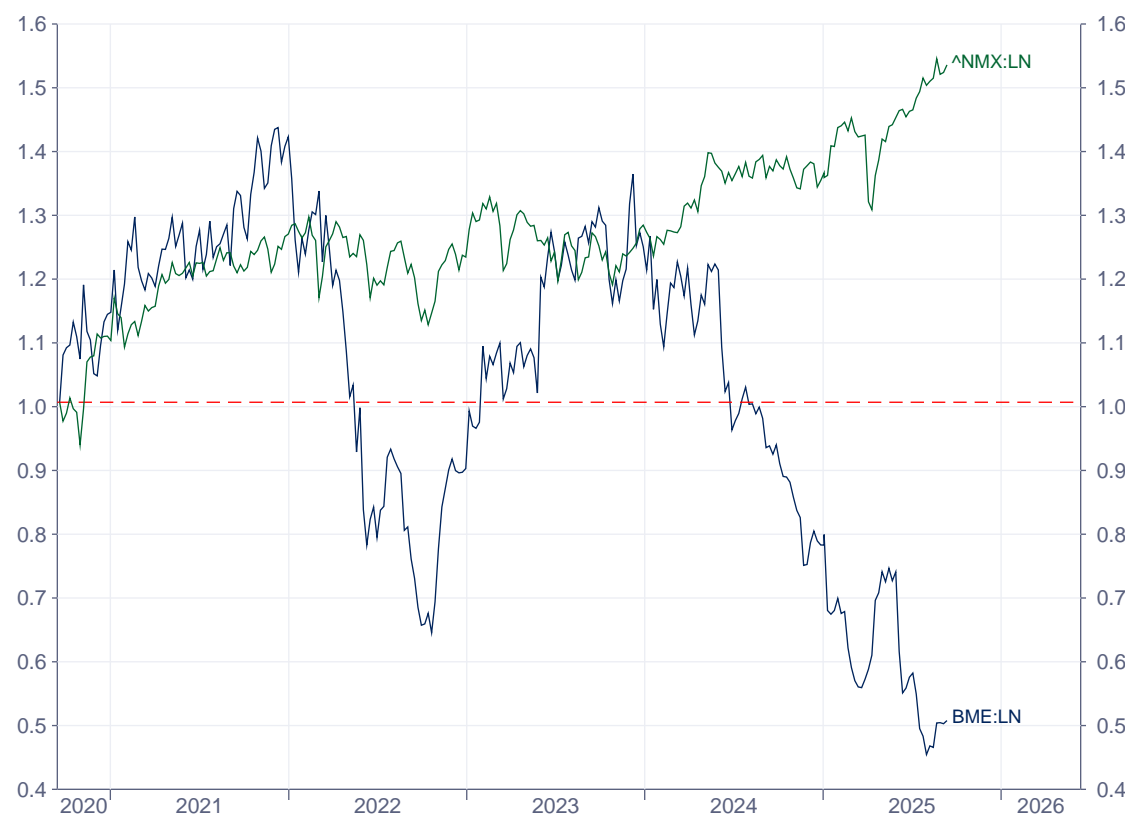
Price Performance, Technical Indicators & Risk Metrics

Price Performance	% Change	Difference vs FTSE 350	Technical Indicators	
1-Day %	-0.04	0.13	50-Day Average Price	2.37
1-Week %	0.87	0.12	Price / 50-Day Average	1.02
4-Week %	7.31	6.38	200-Day Average Price	2.92
52-Week %	-43.24	-54.86	Price / 200-Day Average	0.83
Quarter-to-Date %	-10.80	-16.04	RSI - Relative Strength Index	54.59
Year-to-Date %	-34.03	-46.50	Risk Metrics	
Last Month %	7.26	6.93	Price Volatility	0.07
Last Quarter %	4.22	1.11	Sharpe Ratio	-0.07
Last Calendar Year %	-34.49	-40.04	Sortino Ratio	-0.12
			Beta 3-Year vs. S&P 500	
			Beta 5-Year vs. S&P 500	

5-Year Price Performance vs. FTSE 350

B&M European Value Retail SA
FTSE 350 Index

Current: 0.53 CAGR: -11.9%
Current: 1.50 CAGR: 8.4%



Over the past five years, B&M European Value Retail SA's stock price is down 46.9% which is 96.6% below the FTSE 350 Index performance of 49.7% over the same period. B&M European Value Retail SA's cumulative annualized growth rate (CAGR) over the five year period has been -11.9% while that of the FTSE 350 Index has been 8.4%.

Over the past year, B&M European Value Retail SA's stock price performance of -43.2% has underperformed that of the FTSE 350 Index by 54.9%. On a year-to-date basis, B&M European Value Retail SA's stock price performance of -34.0% has underperformed the FTSE 350 Index by 46.5%.

Over the past week, B&M European Value Retail SA's stock price performance of 0.9% has outperformed that of the FTSE 350 Index by 0.1%.

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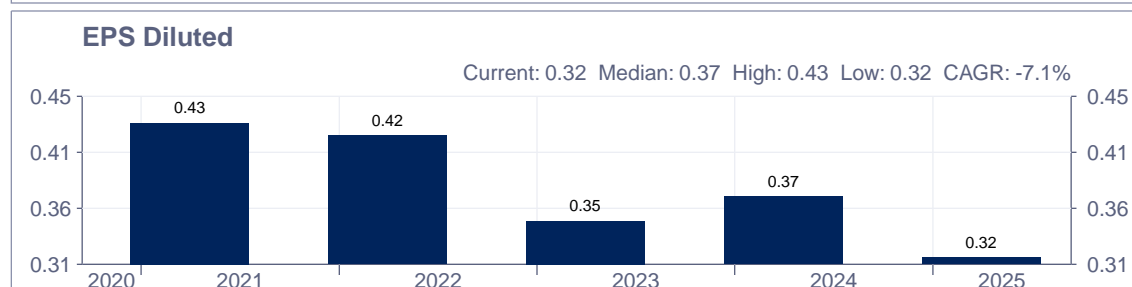
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Growth and Profitability Metrics

Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %	6.0	7.9	13.0	Gross Margin %	37.6	36.8	35.5
Revenues Per Share %	5.9	7.8	12.9	EBITDA Margin %	12.6	14.1	11.6
EBITDA %	-1.0	9.8	17.4	Pre-Tax Margin %	7.7	9.7	8.4
EPS Diluted %	-9.0	6.8	19.9	Net Margin %	5.7	7.8	6.9
Free Cash Flow %	1.2	-0.6	18.3	Return on Equity %	42.9	48.0	33.7
Cash from Operations %	1.0	-1.4	16.4	Return on Capital %	11.5	14.0	12.7
Book Value %	0.2	-2.9	0.5	Return on Assets %	8.3	10.6	9.6



B&M European Value Retail SA's cumulative annualized revenue growth rate over the charted period is 3.8%. This compares to cumulative annualized growth of 6.0% over the past 3 years.



B&M European Value Retail SA's cumulative annualized EPS growth rate over the charted period is -7.1%. This compares to cumulative annualized growth of -9.0% over the past 3 years.



B&M European Value Retail SA's net profit margin of 5.7% is 2.0% below the period's mean net margin of 7.8%. During the charted period, the observed net profit margin high and low were 10.0% and 5.6% respectively.



B&M European Value Retail SA's return on equity of 42.9% is 5.1% below the period's mean return on equity of 48.0%. During the charted period, the observed ROE high and low were 54.4% and 42.9% respectively.

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Valuation Metrics

	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	7.6	12.4	15.3	Earnings Yield %	13.18	8.04	6.51
Price / Sales	0.4	1.0	1.1	Free Cash Flow Yield %	16.71	12.29	9.30
Price / Operating Cash Flow	5.3	9.7	11.6	Dividend Yield %	6.20	3.17	2.03
Price / Book Value	3.2	6.1	4.6	Enterprise Value / EBITDA	6.3	9.8	11.1

Price / EPS TTM



B&M European Value Retail SA is trading at 7.63 times its EPS generated during the latest fiscal year. This multiple is below the historically observed median of 12.41, while high and low observations have been 17.22 and 6.91.

Price / Sales



B&M European Value Retail SA is trading at a Price to Sales ratio of 0.44 based on sales generated during the latest fiscal year. This ratio is below the historically observed median ratio of 1.00, while high and low observations have been 1.33 and 0.40.

Price / Book Value



B&M European Value Retail SA is trading at a Price to Book ratio of 3.23 based on book value at the latest fiscal year end. This ratio is below the historically observed median of 6.08, while high and low observations have been 8.16 and 2.93.

Free Cash Flow Yield %



B&M European Value Retail SA has a Free Cash Flow Yield of 16.71% based on free cash flow generated during the latest fiscal year. This value is above the historically observed median yield of 12.29%, while high and low observations have been 21.15 and 7.16.

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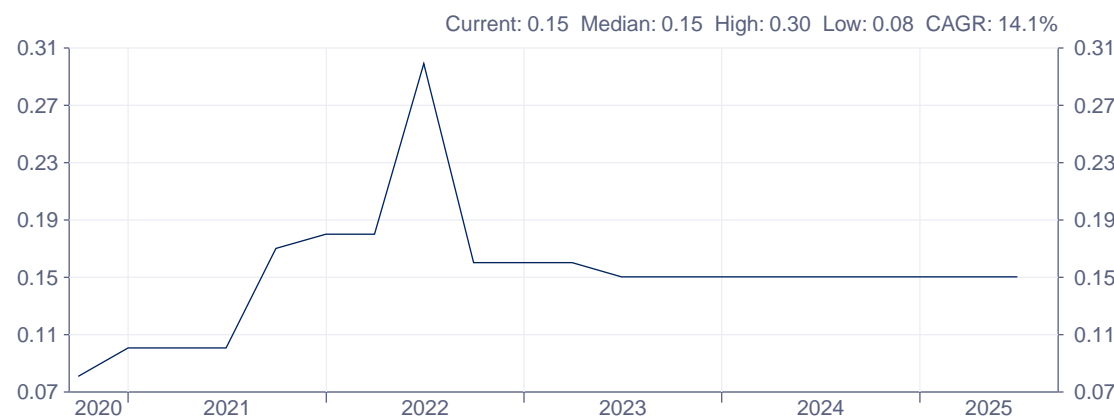
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Dividends Data

Dividends Per Share TTM	0.15	Payout Ratio TTM %	46.96%	Dividend Yield TTM %	6.20%
Rate	Ex Date	Record Date	Payment Date	Currency	Note
0.097	26-06-2025	27-06-2025	01-08-2025	GBP	
0.053	21-11-2024	22-11-2024	13-12-2024	GBP	
0.096	27-06-2024	28-06-2024	02-08-2024	GBP	
0.051	16-11-2023	17-11-2023	15-12-2023	GBP	
0.096	29-06-2023	30-06-2023	04-08-2023	GBP	
0.050	17-11-2022	18-11-2022	16-12-2022	GBP	
0.115	30-06-2022	01-07-2022	05-08-2022	GBP	
0.050	18-11-2021	19-11-2021	17-12-2021	GBP	
0.130	01-07-2021	02-07-2021	06-08-2021	GBP	
0.043	19-11-2020	20-11-2020	04-12-2020	GBP	
0.054	20-08-2020	21-08-2020	28-09-2020	GBP	
0.027	21-11-2019	22-11-2019	20-12-2019	GBP	

Dividend Growth and Yield

Dividends Per Share TTM



B&M European Value Retail SA's trailing 12-month dividend per share is 0.15 and its dividend has grown at a cumulative annualized rate of 14.1% over the charted period. This compares to dividend growth of 2.00% over the past year and cumulative annualized growth of -20.20% over the past 3 years.

Dividend Yield TTM %



B&M European Value Retail SA's current dividend yield is 6.20% based on trailing 12 month dividends. The current yield is above the historically observed median of 3.17% and, over the charted time period, the observed high yield has been 9.64% and the observed low yield has been 0.55%.

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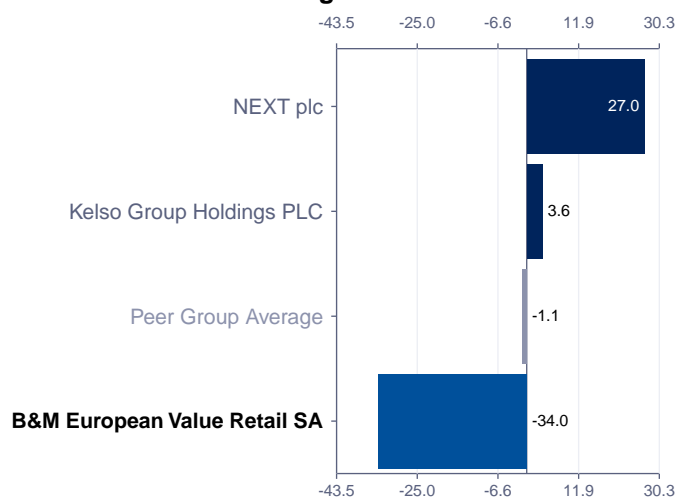
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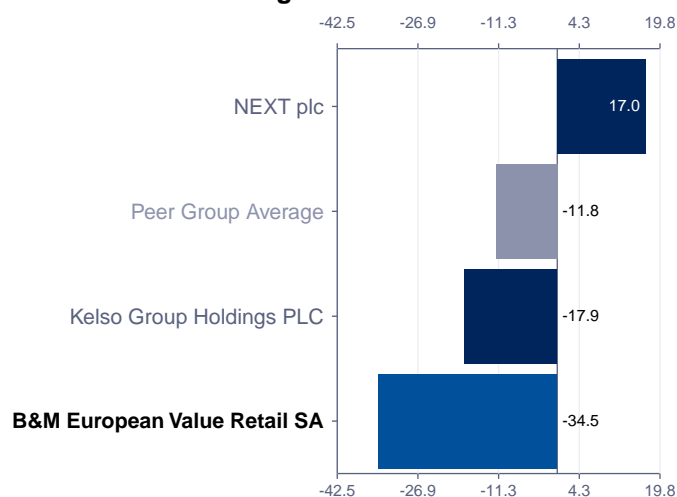
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ICB Subsector Peer Comparisons

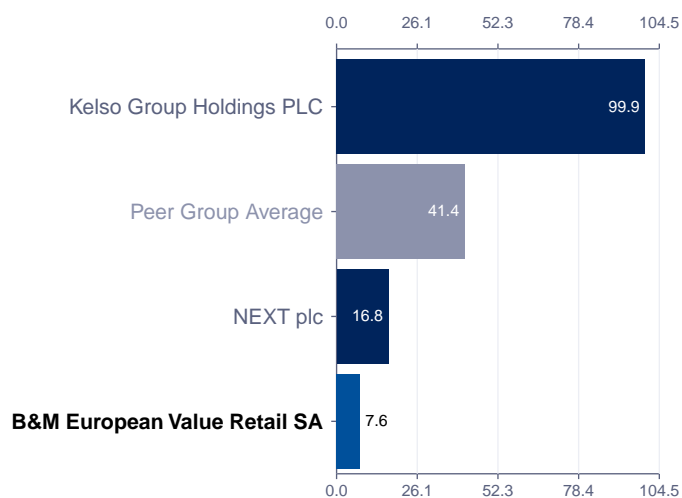
Price Change Year to Date %



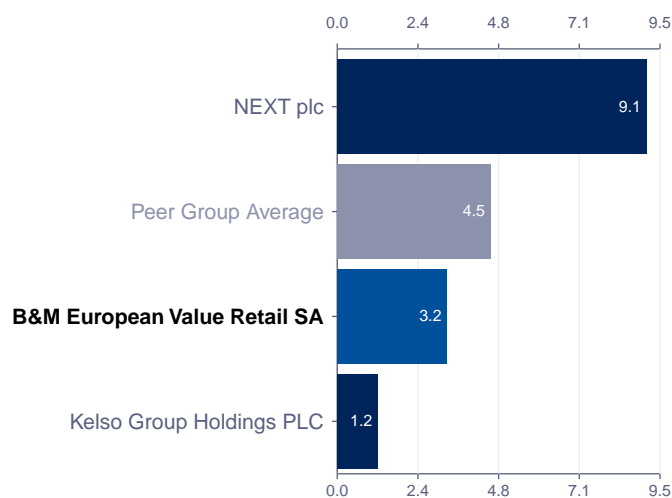
Price Change Last Calendar Year %



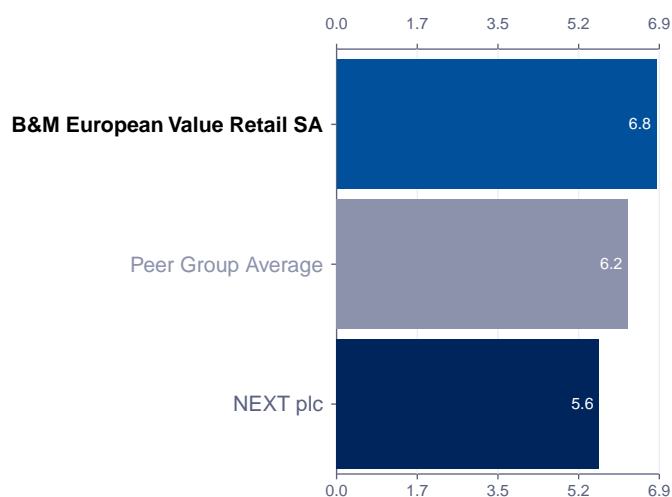
Price / EPS TTM



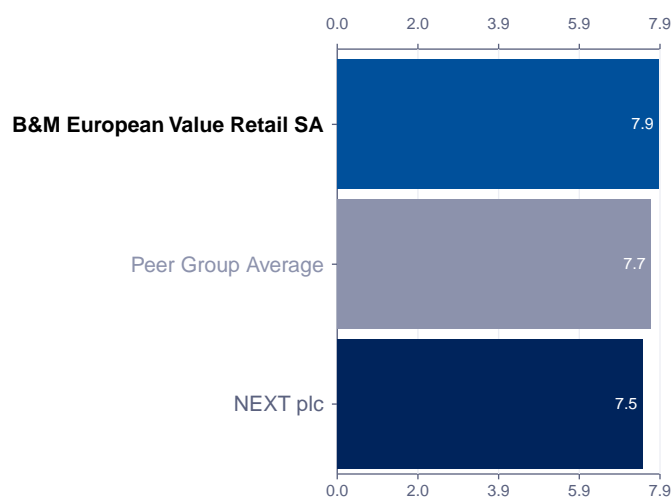
Price / Book Value



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.

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 = 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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