

Centamin plc (CEY:LN)



Basic Materials/Gold Mining

Price: 124.30

Report Date: April 23, 2024

Business Description and Key Statistics

Centamin plc is a Jersey-based gold producer. Its assets include Sukari Gold Mine, Doropo Gold Project and ABC Project. The Sukari is a bulk tonnage open pit and a high-grade underground operation, with significant exploration upside at depth and regionally, within the 160 square kilometers (km²) tenement. The Doropo Project consists of seven exploration permits, covering an area of over 1,850 km². The Doropo Project is in the northeast of Cote d'Ivoire, over 480 kilometers (km) north of Abidjan. The ABC Project is in northwest Cote d'Ivoire, over 550 km northwest of Abidjan and 460 km west of Centamin's Doropo project. Its EDX Blocks comprise 3,000 km² of greenfield exploration tenements within the Egyptian section of the Arabian Nubian Shield. The land package is divided into three blocks: Nugrus Block, which covers over 1,086 km², Um Rus Block, which is located 50 km north of Sukari, and Najd Block, which is located 100 km northwest of Sukari in the Central Eastern Desert.

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

ICB Industry: Basic Materials

ICB Subsector: Gold Mining

Address: 2 Mulcaster Street
SAINT HELIER JE2 3NJ
JEY

Employees: 2,356

	Current	YTY % Chg
Revenue LFY (M)	891	13.0
EPS Diluted LFY	0.08	26.8
Market Value (M)	1,440	
Shares Outstanding LFY (000)	1,158,433	
Book Value Per Share	1.18	
EBITDA Margin %	33.40	
Net Margin %	10.5	
Long-Term Debt / Capital %	0.0	
Dividends and Yield TTM	0.04 - 3.62%	
Payout Ratio TTM %	56.4	
60-Day Average Volume (000)	5,865	
52-Week High & Low	130.30 - 78.15	
Price / 52-Week High & Low	0.95 - 1.59	

Price, Moving Averages & Volume



Centamin plc is currently trading at 124.30 which is 15.7% above its 50 day moving average price of 107.42 and 31.2% above its 200 day moving average price of 94.75.

CEY:LN is currently 4.6% below its 52-week high price of 130.30 and is 59.1% above its 52-week low price of 78.15. Over the past 52-weeks, CEY:LN is up 18.2% while on a calendar year-to-date basis it is up 24.7%.

The Relative Strength Index (RSI) indicator for CEY:LN is currently 61.96. 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 %	-1.35	-1.72	50-Day Average Price	107.42
1-Week %	-3.04	-5.84	Price / 50-Day Average	1.16
4-Week %	16.82	15.53	200-Day Average Price	94.75
52-Week %	18.16	16.30	Price / 200-Day Average	1.31
Quarter-to-Date %	10.10	9.16	RSI - Relative Strength Index	61.96
Year-to-Date %	24.67	21.14	Risk Metrics	
Last Month %	25.03	20.78	Price Volatility	7.23
Last Quarter %	13.24	10.67	Sharpe Ratio	0.11
Last Calendar Year %	-11.69	-15.57	Sortino Ratio	0.19

5-Year Price Performance vs. FTSE 350

Centamin plc
FTSE 350 Index

Current: 1.36 CAGR: 6.4%
Current: 1.07 CAGR: 1.4%



Over the past five years, Centamin plc's stock price is up 36.3% which is 29.1% above the FTSE 350 Index performance of 7.2% over the same period. Centamin plc's cumulative annualized growth rate (CAGR) over the five year period has been 6.4% while that of the FTSE 350 Index has been 1.4%.

Over the past year, Centamin plc's stock price performance of 18.2% has outperformed that of the FTSE 350 Index by 16.3%. On a year-to-date basis, Centamin plc's stock price performance of 24.7% has outperformed the FTSE 350 Index by 21.1%.

Over the past week, Centamin plc's stock price performance of -3.0% has underperformed that of the FTSE 350 Index by 5.8%.

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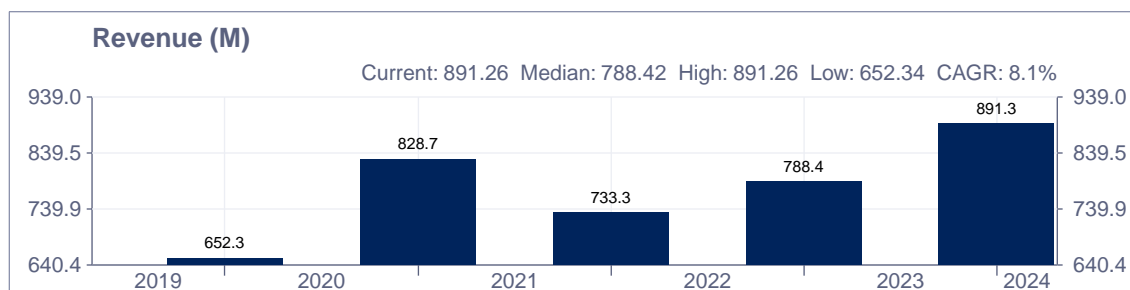
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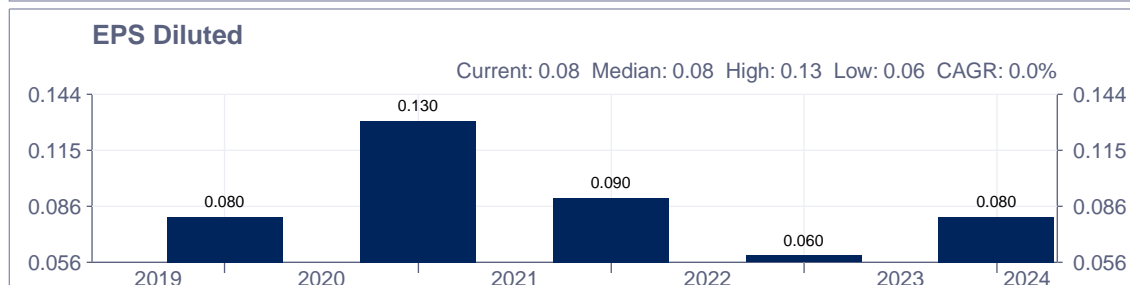
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Growth and Profitability Metrics

Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %	2.5	8.1	5.9	Gross Margin %	29.1	33.0	35.0
Revenues Per Share %	2.1	7.9	5.2	EBITDA Margin %	33.4	38.3	45.2
EBITDA %	-7.6	-1.4	-0.6	Pre-Tax Margin %	21.9	26.5	26.1
EPS Diluted %	-16.2	2.3	-7.2	Net Margin %	10.5	14.0	16.4
Free Cash Flow %	-22.0	-11.2	999.9	Return on Equity %	6.8	8.1	8.0
Cash from Operations %	-7.9	-4.6	-3.2	Return on Capital %	6.8	8.2	8.1
Book Value %	1.8	1.1	0.7	Return on Assets %	6.2	7.7	7.7



Centamin plc's cumulative annualized revenue growth rate over the charted period is 8.1%. This compares to cumulative annualized growth of 2.5% over the past 3 years.



Centamin plc's cumulative annualized EPS growth rate over the charted period is 0.0%. This compares to cumulative annualized growth of -16.2% over the past 3 years.



Centamin plc's net profit margin of 10.5% is 3.5% below the period's mean net margin of 14.0%. During the charted period, the observed net profit margin high and low were 19.2% and 8.5% respectively.



Centamin plc's return on equity of 6.8% is 1.3% 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 3.9% respectively.

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Valuation Metrics

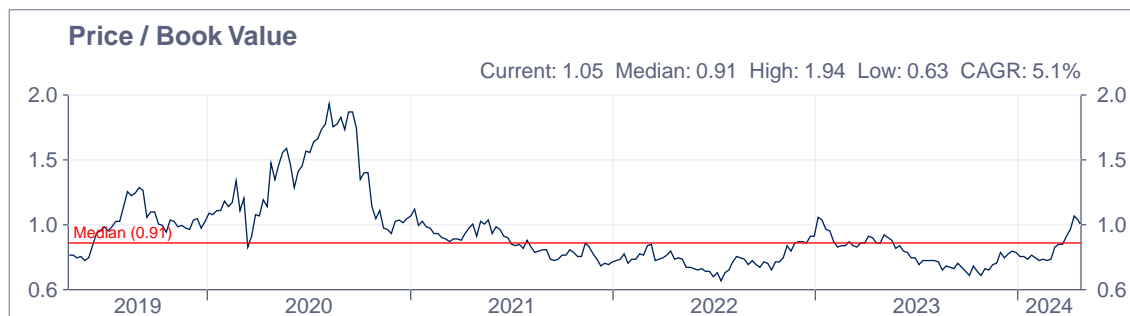
	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	15.6	12.5	11.4	Earnings Yield %	6.42	8.01	8.81
Price / Sales	1.6	1.6	1.7	Free Cash Flow Yield %	5.17	6.04	7.96
Price / Operating Cash Flow	7.6	6.5	6.2	Dividend Yield %	3.62	5.59	5.64
Price / Book Value	1.1	0.9	0.9	Enterprise Value / EBITDA	4.5	3.5	3.4



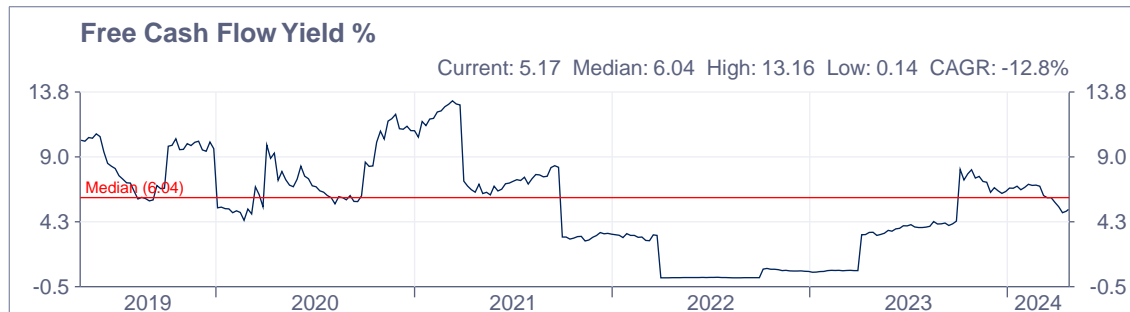
Centamin plc is trading at 15.59 times its EPS generated during the latest fiscal year. This multiple is above the historically observed median of 12.48, while high and low observations have been 33.52 and 6.87.



Centamin plc is trading at a Price to Sales ratio of 1.64 based on sales generated during the latest fiscal year. This ratio is above the historically observed median ratio of 1.56, while high and low observations have been 3.14 and 1.08.



Centamin plc is trading at a Price to Book ratio of 1.05 based on book value at the latest fiscal year end. This ratio is above the historically observed median of 0.91, while high and low observations have been 1.94 and 0.63.



Centamin plc has a Free Cash Flow Yield of 5.17% based on free cash flow generated during the latest fiscal year. This value is below the historically observed median yield of 6.04%, while high and low observations have been 13.16 and 0.14.

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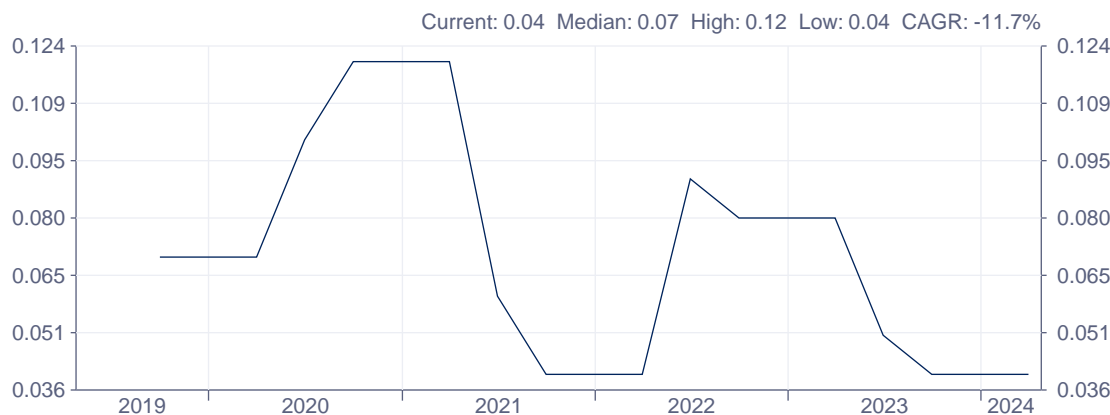
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Dividends Data

Dividends Per Share TTM		0.04	Payout Ratio TTM %		56.43%	Dividend Yield TTM %		3.62%
Rate	Ex Date	Record Date	Payment Date	Currency	Note			
0.020	30-05-2024	31-05-2024	19-06-2024	USD				
0.020	31-08-2023	01-09-2023	29-09-2023	USD				
0.025	01-06-2023	02-06-2023	23-06-2023	USD				
0.025	01-09-2022	02-09-2022	07-10-2022	USD				
0.050	19-05-2022	20-05-2022	10-06-2022	USD				
0.040	02-09-2021	03-09-2021	30-09-2021	USD				
0.060	13-08-2020	14-08-2020	11-09-2020	USD				
0.060	30-04-2020	01-05-2020	15-05-2020	USD				
0.040	29-08-2019	30-08-2019	27-09-2019	USD				
0.030	18-04-2019	23-04-2019	13-05-2019	USD				
0.025	30-08-2018	31-08-2018	28-09-2018	USD				

Dividend Growth and Yield

Dividends Per Share TTM



Centamin plc's trailing 12-month dividend per share is 0.04 and its dividend has grown at a cumulative annualized rate of -11.7% over the charted period. This compares to dividend growth of -20.00% over the past year and cumulative annualized growth of -12.60% over the past 3 years.

Dividend Yield TTM %



Centamin plc's current dividend yield is 3.62% based on trailing 12 month dividends. The current yield is below the historically observed median of 5.59% and, over the charted time period, the observed high yield has been 12.09% and the observed low yield has been 2.19%.

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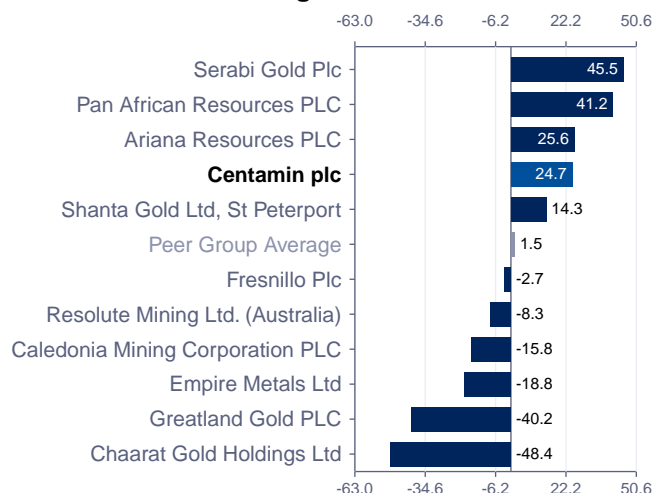
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ICB Subsector Peer Comparisons

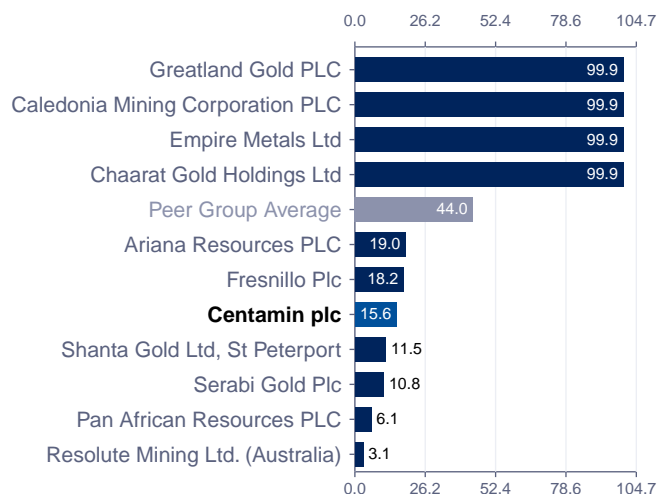
Price Change Year to Date %



Price Change Last Calendar Year %



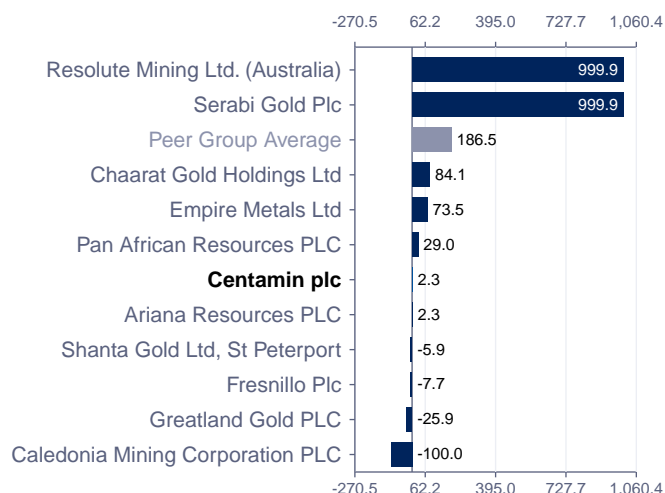
Price / EPS TTM



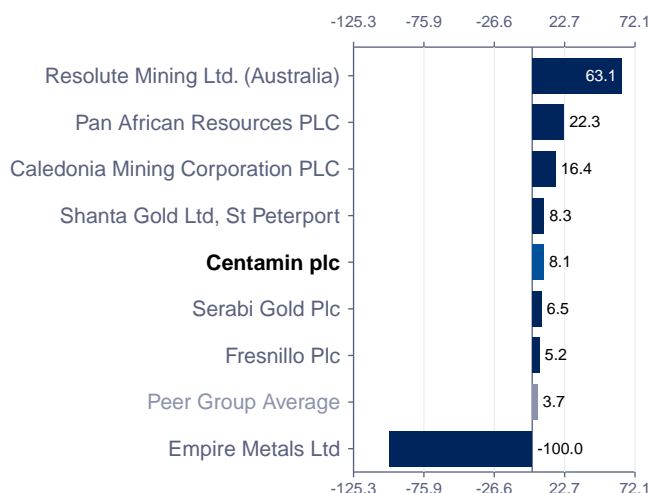
Price / Book Value



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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