

# TClarke plc (CTO:LN)



Industrials/Construction

Price: 161.50

Report Date: April 25, 2024

## Business Description and Key Statistics

TClarke plc is a United Kingdom-based building services company. The Company provides electrical and mechanical contracting and related services to the construction industry and end users. It has five core service areas: engineering services, technologies, infrastructure, residential and hotels, and facilities management. It provides mechanical, electrical and technology engineering, incorporating modern methods of construction (MMC) that deploy offsite prefabrication, pre-assembly and design standardization. The Company provides designing and delivering the technology components for all projects, including smart buildings technologies and data centers. Its infrastructure service area includes healthcare, education, defense and growth areas of public sector infrastructure. The Company's residential and hotels service area includes residential accommodation, including luxury hotels, affordable hotels, student accommodation and private residential. It operates from around 19 locations.

**Website:** <https://www.tclarke.co.uk/>

**ICB Industry:** Industrials

**ICB Subsector:** Construction

**Address:** 45 Moorfields  
LONDON EC2Y 9AE  
GBR

**Employees:** 1,412

	Current	YTY % Chg
<b>Revenue LFY (M)</b>	491	15.3
<b>EPS Diluted LFY</b>	0.14	-27.9
<b>Market Value (M)</b>	85	
<b>Shares Outstanding LFY (000)</b>	52,851	
<b>Book Value Per Share</b>	1.01	
<b>EBITDA Margin %</b>	2.20	
<b>Net Margin %</b>	1.3	
<b>Long-Term Debt / Capital %</b>	8.9	
<b>Dividends and Yield TTM</b>	0.06 - 3.39%	
<b>Payout Ratio TTM %</b>	38.9	
<b>60-Day Average Volume (000)</b>	173	
<b>52-Week High &amp; Low</b>	161.50 - 118.50	
<b>Price / 52-Week High &amp; Low</b>	1.00 - 1.36	

## Price, Moving Averages & Volume



TClarke plc is currently trading at 161.50 which is 23.2% above its 50 day moving average price of 131.07 and 24.1% above its 200 day moving average price of 130.14.

CTO:LN is currently trading at its 52-week high price of 161.50 and is 36.3% above its 52-week low price of 118.50. Over the past 52-weeks, CTO:LN is up 18.3% while on a calendar year-to-date basis it is up 18.8%.

The Relative Strength Index (RSI) indicator for CTO:LN is currently 81.92. An RSI value of 70 and above is considered overbought and 30 and below oversold.

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**London**  
Stock Exchange

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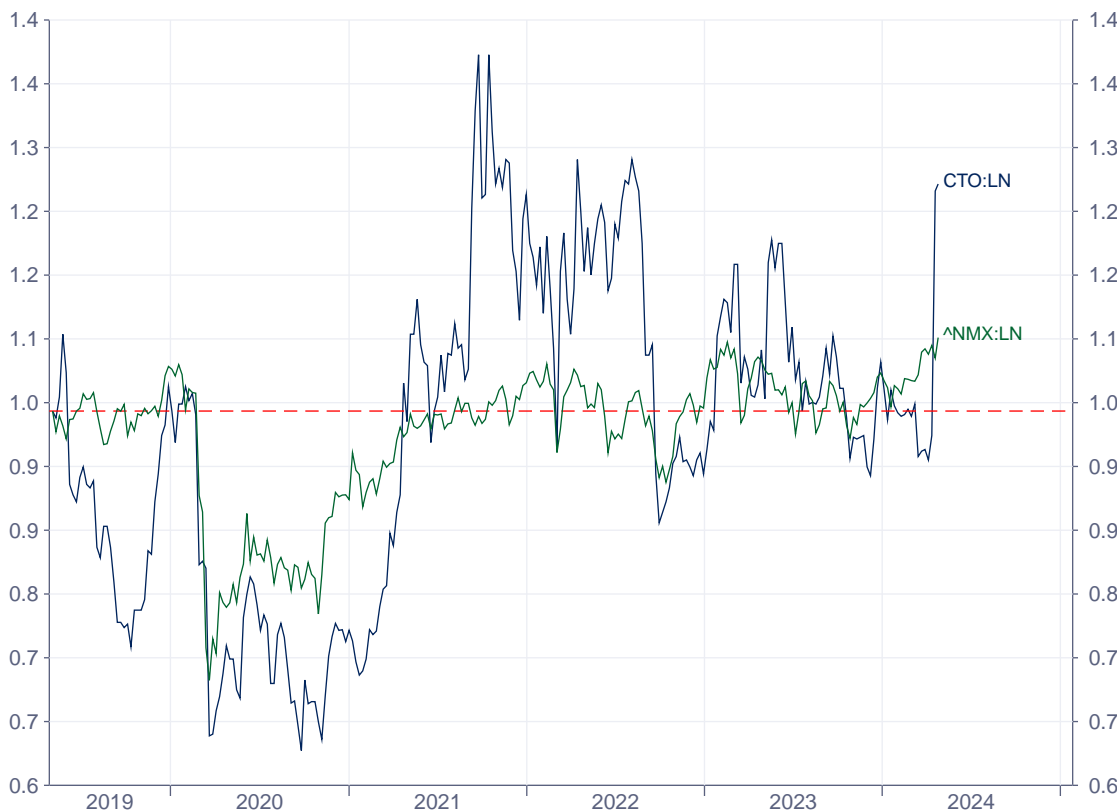
## Price Performance, Technical Indicators & Risk Metrics

Price Performance	% Change	Difference vs FTSE 350	Technical Indicators	
1-Day %	0.16	-0.17	50-Day Average Price	131.07
1-Week %	0.62	-1.70	Price / 50-Day Average	1.23
4-Week %	30.77	29.29	200-Day Average Price	130.14
52-Week %	18.32	15.55	Price / 200-Day Average	1.24
Quarter-to-Date %	30.77	29.60	RSI - Relative Strength Index	81.92
Year-to-Date %	18.75	14.98	<b>Risk Metrics</b>	
Last Month %	-3.89	-8.14	Price Volatility	18.60
Last Quarter %	-9.19	-11.76	Sharpe Ratio	0.07
Last Calendar Year %	13.33	9.45	Sortino Ratio	0.14

## 5-Year Price Performance vs. FTSE 350

TClarke plc  
FTSE 350 Index

Current: 1.25 CAGR: 4.6%  
Current: 1.08 CAGR: 1.6%



Over the past five years, TClarke plc's stock price is up 25.2% which is 17.0% above the FTSE 350 Index performance of 8.1% over the same period. TClarke plc's cumulative annualized growth rate (CAGR) over the five year period has been 4.6% while that of the FTSE 350 Index has been 1.6%.

Over the past year, TClarke plc's stock price performance of 18.3% has outperformed that of the FTSE 350 Index by 15.6%. On a year-to-date basis, TClarke plc's stock price performance of 18.8% has outperformed the FTSE 350 Index by 15.0%.

Over the past week, TClarke plc's stock price performance of 0.6% has underperformed that of the FTSE 350 Index by 1.7%.

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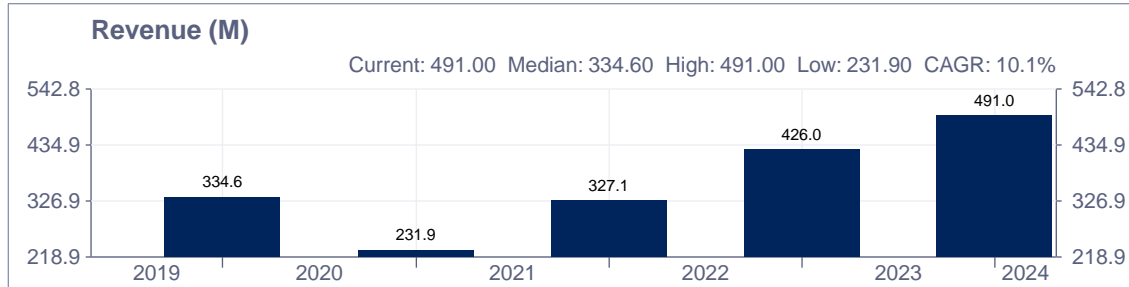
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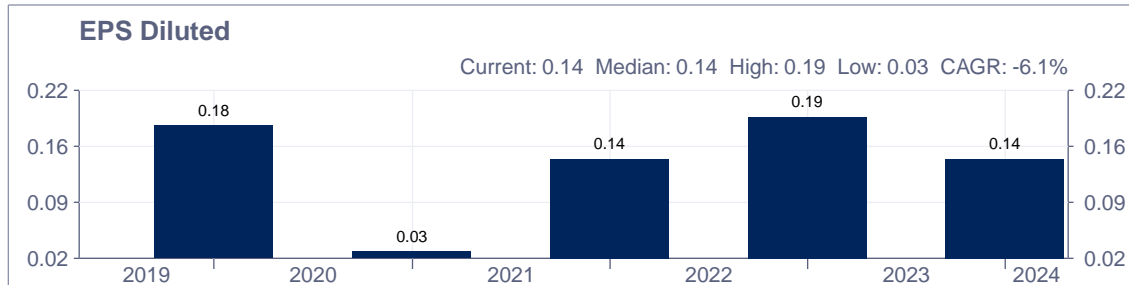
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## Growth and Profitability Metrics

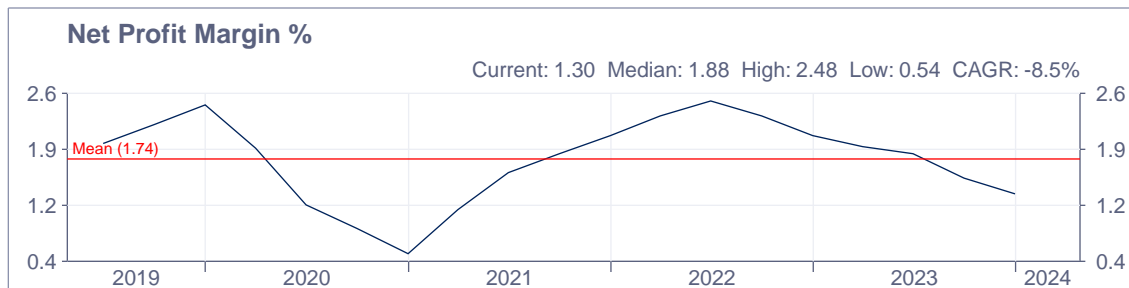
Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %	28.4	8.5	8.5	Gross Margin %	10.0	12.0	11.8
Revenues Per Share %	27.3	7.1	7.9	EBITDA Margin %	2.2	3.0	2.5
EBITDA %	16.4	3.9	12.6	Pre-Tax Margin %	1.6	2.0	1.7
EPS Diluted %	70.9	-1.2	18.1	Net Margin %	1.3	1.7	1.4
Free Cash Flow %	31.8	20.8	999.9	Return on Equity %	14.9	24.2	21.8
Cash from Operations %	33.0	20.0	999.9	Return on Capital %	13.0	22.6	19.5
Book Value %	40.5	14.4	5.4	Return on Assets %	3.4	3.9	3.4



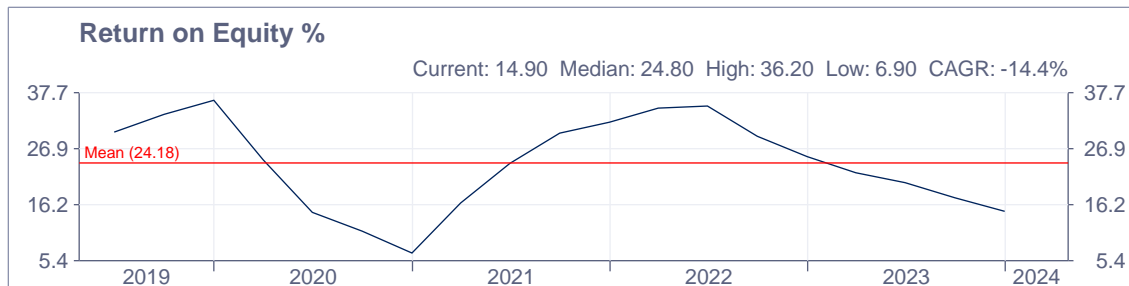
TClarke plc's cumulative annualized revenue growth rate over the charted period is 10.1%. This compares to cumulative annualized growth of 28.4% over the past 3 years.



TClarke plc's cumulative annualized EPS growth rate over the charted period is -6.1%. This compares to cumulative annualized growth of 70.9% over the past 3 years.



TClarke plc's net profit margin of 1.3% is 0.4% below the period's mean net margin of 1.7%. During the charted period, the observed net profit margin high and low were 2.5% and 0.5% respectively.



TClarke plc's return on equity of 14.9% is 9.3% below the period's mean return on equity of 24.2%. During the charted period, the observed ROE high and low were 36.2% and 6.9% respectively.

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## Valuation Metrics

	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	11.5	8.2	8.7	Earnings Yield %	8.71	12.25	11.49
Price / Sales	0.2	0.2	0.1	Free Cash Flow Yield %	5.62	4.11	4.22
Price / Operating Cash Flow	9.2	6.8	7.7	Dividend Yield %	3.39	3.83	3.95
Price / Book Value	1.6	2.2	2.0	Enterprise Value / EBITDA	5.8	4.0	4.0

### Price / EPS TTM



TClarke plc is trading at 11.48 times its EPS generated during the latest fiscal year. This multiple is above the historically observed median of 8.15, while high and low observations have been 39.54 and 4.46.

### Price / Sales



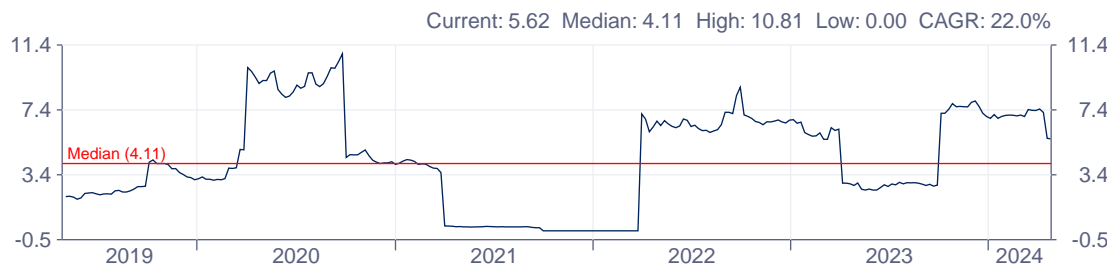
TClarke plc is trading at a Price to Sales ratio of 0.15 based on sales generated during the latest fiscal year. This ratio is equal to the historically observed Price/Sales ratio of 0.15, while high and low observations have been 0.31 and 0.11.

### Price / Book Value



TClarke plc is trading at a Price to Book ratio of 1.60 based on book value at the latest fiscal year end. This ratio is below the historically observed median of 2.20, while high and low observations have been 4.08 and 1.21.

### Free Cash Flow Yield %



TClarke plc has a Free Cash Flow Yield of 5.62% based on free cash flow generated during the latest fiscal year. This value is above the historically observed median yield of 4.11%, while high and low observations have been 10.81 and 0.00.

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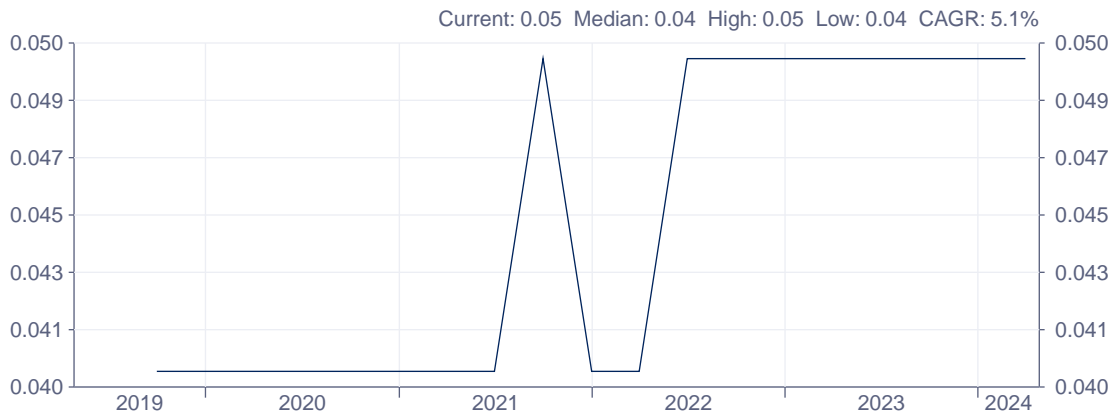
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## Dividends Data

Dividends Per Share TTM	0.06	Payout Ratio TTM %	38.91%	Dividend Yield TTM %	3.39%
Rate	Ex Date	Record Date	Payment Date	Currency	Note
0.045	16-05-2024	17-05-2024	07-06-2024	GBP	
0.014	31-08-2023	01-09-2023	29-09-2023	GBP	
0.041	04-05-2023	05-05-2023	02-06-2023	GBP	
0.013	01-09-2022	02-09-2022	30-09-2022	GBP	
0.041	21-04-2022	22-04-2022	20-05-2022	GBP	
0.008	02-09-2021	03-09-2021	01-10-2021	GBP	
0.037	22-04-2021	23-04-2021	21-05-2021	GBP	
0.008	15-10-2020	16-10-2020	13-11-2020	GBP	
0.037	18-06-2020	19-06-2020	17-07-2020	GBP	
0.008	05-09-2019	06-09-2019	04-10-2019	GBP	
0.033	25-04-2019	26-04-2019	24-05-2019	GBP	
0.007	06-09-2018	07-09-2018	05-10-2018	GBP	

## Dividend Growth and Yield

### Dividends Per Share TTM



TClarke plc's trailing 12-month dividend per share is 0.05 and its dividend has grown at a cumulative annualized rate of 5.1% over the charted period. This compares to dividend growth of 10.30% over the past year and cumulative annualized growth of 10.30% over the past 3 years.

### Dividend Yield TTM %



TClarke plc's current dividend yield is 3.39% based on trailing 12 month dividends. The current yield is below the historically observed median of 3.83% and, over the charted time period, the observed high yield has been 5.47% and the observed low yield has been 2.44%.

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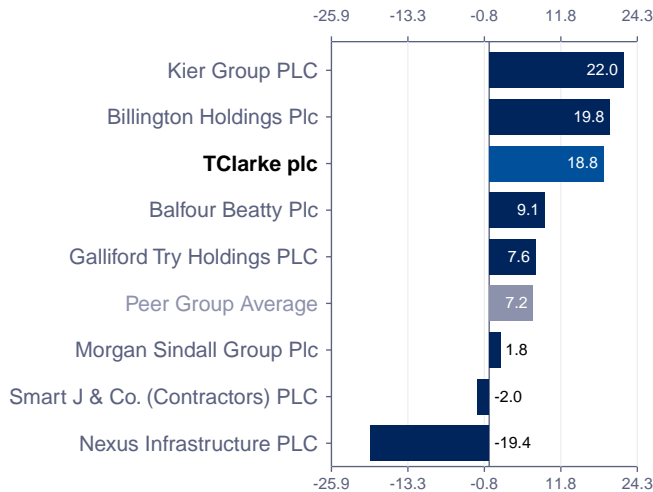
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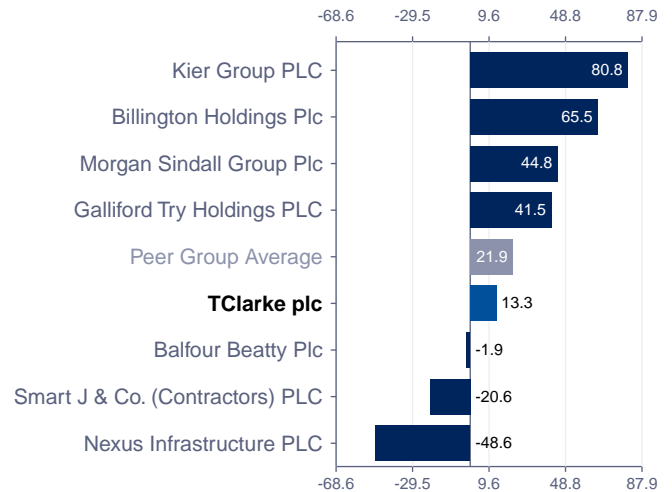
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## ICB Subsector Peer Comparisons

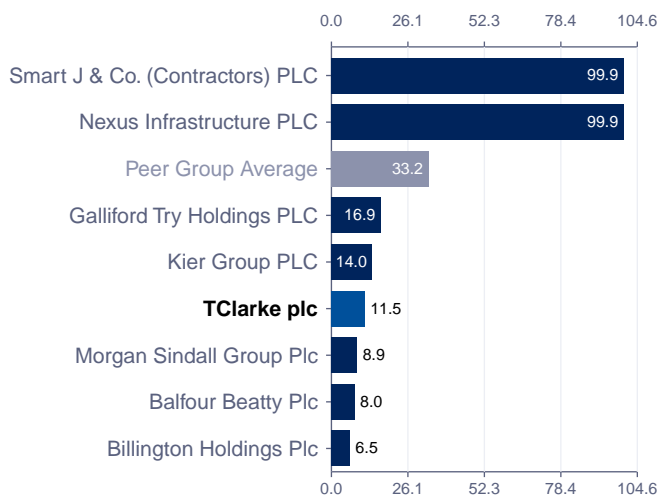
### Price Change Year to Date %



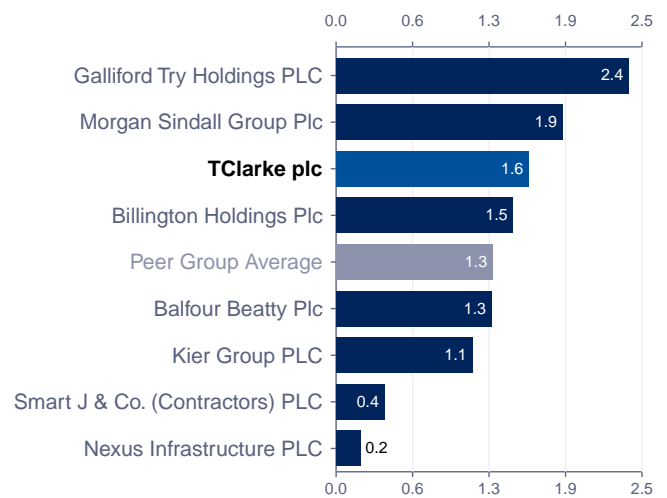
### Price Change Last Calendar Year %



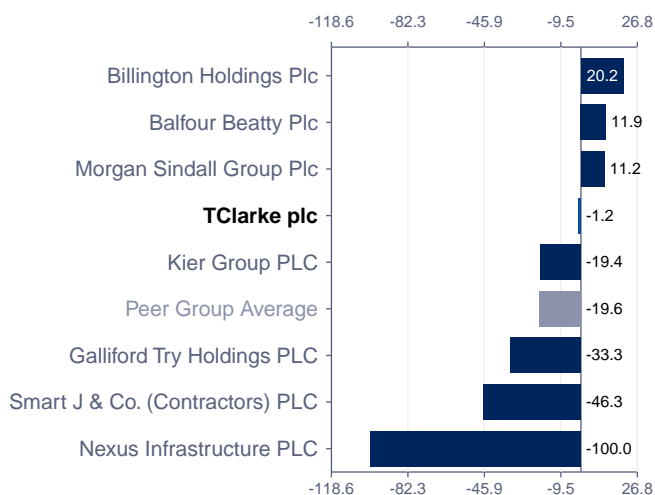
### Price / EPS TTM



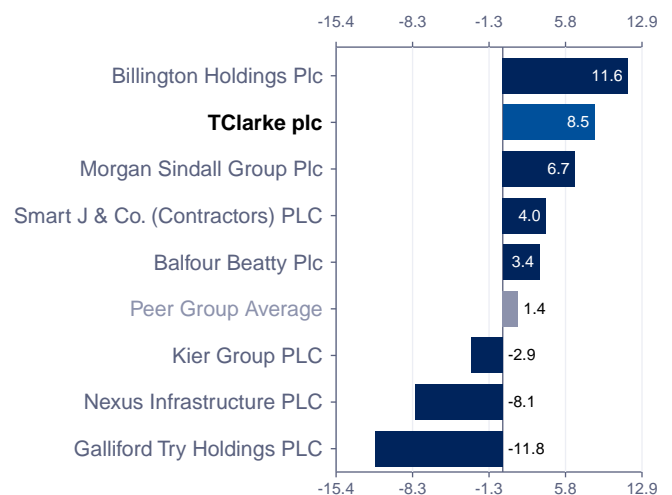
### Price / Book Value



### EPS 5-Year Growth Rate %



### Revenue 5-Year Growth Rate %



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## Abbreviations:

<b>CAGR</b>	- Cumulative annual growth rate.
<b>EBIT</b>	- Earnings before interest and taxes.
<b>EBITDA</b>	- Earnings before interest, taxes, depreciation & amortization.
<b>LFY</b>	- Last fiscal year
<b>M</b>	- Million
<b>LON</b>	- 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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