

Dunelm Group PLC (DNLM:LN)



London
Stock Exchange

Consumer Discretionary/Home Improvement Retailers

Price: 1,109.00

Report Date: March 27, 2024

Business Description and Key Statistics

Dunelm Group plc is a United Kingdom-based homewares retailer. The Company offers a distinctive and specialist product portfolio through a retail system that combines physical stores and digital channels. It offers a range of products, spanning multiple homewares and furniture categories, and including services such as made to measure window treatments. It provides curtains, Roman blinds and cushions made in its own United Kingdom factory. The Company offers various brands, including Dorma, Pausa, Fogarty, and others. Dorma brand provides bedding, curtains, cushions, and homewares. Its Pausa cafes serve customers, colleagues, and local communities. The Fogarty brand includes pillows and quilts. It has an online offer through dunelm.com which includes home delivery and click and collect options. It predominantly sells specialist own-brand products. It has about 152 stores, which include Pausa coffee shops, where customers are provided with a range of hot and cold food and drinks.

Website: <https://corporate.dunelm.com/>

ICB Industry: Consumer Discretionary

ICB Subsector: Home Improvement Retailers

Address: Watermead Business Park, Syston
LEICESTER LE7 1AD
GBR

Employees: 7,360

	Current	YTY % Chg
Revenue LFY (M)	1,639	3.4
EPS Diluted LFY	0.75	-0.8
Market Value (M)	2,242	
Shares Outstanding LFY (000)	202,122	
Book Value Per Share	0.87	
EBITDA Margin %	14.60	
Net Margin %	9.0	
Long-Term Debt / Capital %	58.2	
Dividends and Yield TTM	0.43 - 3.79%	
Payout Ratio TTM %	56.8	
60-Day Average Volume (000)	266	
52-Week High & Low	1,191.00 - 974.00	
Price / 52-Week High & Low	0.93 - 1.14	

Price, Moving Averages & Volume



Dunelm Group PLC is currently trading at 1,109.00 which is 0.4% above its 50 day moving average price of 1,105.04 and 1.9% above its 200 day moving average price of 1,088.07.

DNLM:LN is currently 6.9% below its 52-week high price of 1,191.00 and is 13.9% above its 52-week low price of 974.00. Over the past 52-weeks, DNLM:LN is down 0.3% while on a calendar year-to-date basis it is up 1.1%.

The Relative Strength Index (RSI) indicator for DNLM:LN is currently 51.3. 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 %	1.65	1.62	50-Day Average Price	1105.04
1-Week %	4.82	2.42	Price / 50-Day Average	1.00
4-Week %	-3.06	-7.11	200-Day Average Price	1088.07
52-Week %	-0.27	-6.49	Price / 200-Day Average	1.02
Quarter-to-Date %	1.09	-1.20	RSI - Relative Strength Index	51.30
Year-to-Date %	1.09	-1.20	Risk Metrics	
Last Month %	5.22	5.45	Price Volatility	44.32
Last Quarter %	4.48	2.00	Sharpe Ratio	0.07
Last Calendar Year %	12.05	8.17	Sortino Ratio	0.14

5-Year Price Performance vs. FTSE 350

Dunelm Group PLC
FTSE 350 Index

Current: 1.28 CAGR: 5.0%
Current: 1.08 CAGR: 1.6%



Over the past five years, Dunelm Group PLC's stock price is up 27.5% which is 19.2% above the FTSE 350 Index performance of 8.4% over the same period. Dunelm Group PLC's cumulative annualized growth rate (CAGR) over the five year period has been 5.0% while that of the FTSE 350 Index has been 1.6%.

Over the past year, Dunelm Group PLC's stock price performance of -0.3% has underperformed that of the FTSE 350 Index by 6.5%. On a year-to-date basis, Dunelm Group PLC's stock price performance of 1.1% has underperformed the FTSE 350 Index by 1.2%.

Over the past week, Dunelm Group PLC's stock price performance of 4.8% has outperformed that of the FTSE 350 Index by 2.4%.

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Growth and Profitability Metrics

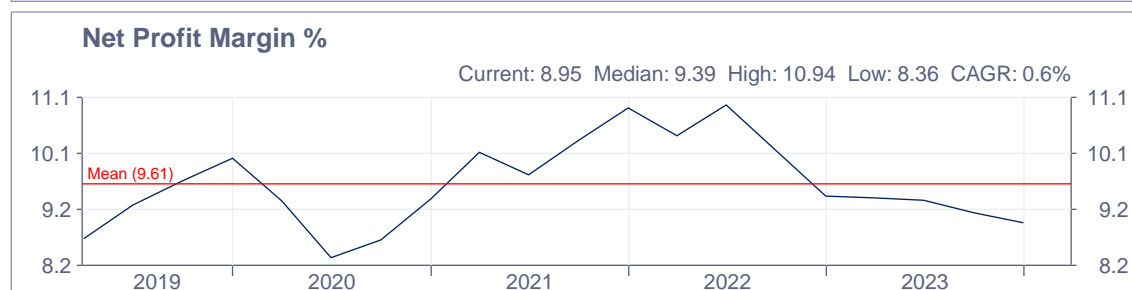
Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %	12.0	9.7	9.2	Gross Margin %	50.9	50.7	49.9
Revenues Per Share %	12.3	9.7	9.3	EBITDA Margin %	14.6	15.1	14.9
EBITDA %	8.6	13.3	7.4	Pre-Tax Margin %	11.8	11.9	12.3
EPS Diluted %	10.7	12.2	6.0	Net Margin %	9.0	9.6	9.8
Free Cash Flow %	-6.4	12.7	9.2	Return on Equity %	91.7	68.1	66.7
Cash from Operations %	-4.3	10.5	7.9	Return on Capital %	35.4	32.0	37.0
Book Value %	-11.9	2.5	0.6	Return on Assets %	21.0	20.0	22.1



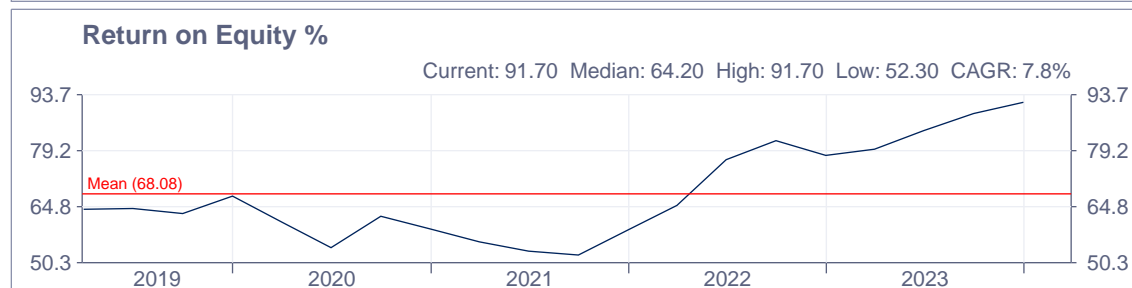
Dunelm Group PLC's cumulative annualized revenue growth rate over the charted period is 10.5%. This compares to cumulative annualized growth of 12.0% over the past 3 years.



Dunelm Group PLC's cumulative annualized EPS growth rate over the charted period is 10.7%. This compares to cumulative annualized growth of 10.7% over the past 3 years.



Dunelm Group PLC's net profit margin of 9.0% is 0.7% below the period's mean net margin of 9.6%. During the charted period, the observed net profit margin high and low were 10.9% and 8.4% respectively.



Dunelm Group PLC's return on equity of 91.7% is 23.6% above the period's mean return on equity of 68.1%. During the charted period, the observed ROE high and low were 91.7% and 52.3% respectively.

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Valuation Metrics

	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	15.0	17.3	17.7	Earnings Yield %	6.67	5.80	5.64
Price / Sales	1.3	1.6	1.7	Free Cash Flow Yield %	4.69	4.63	3.14
Price / Operating Cash Flow	11.8	13.8	15.0	Dividend Yield %	3.79	3.09	2.97
Price / Book Value	12.8	11.4	11.4	Enterprise Value / EBITDA	10.2	12.5	12.5

Price / EPS TTM



Dunelm Group PLC is trading at 14.98 times its EPS generated during the latest fiscal year. This multiple is below the historically observed median of 17.25, while high and low observations have been 32.92 and 8.03.

Price / Sales



Dunelm Group PLC is trading at a Price to Sales ratio of 1.34 based on sales generated during the latest fiscal year. This ratio is below the historically observed median ratio of 1.62, while high and low observations have been 2.75 and 0.88.

Price / Book Value



Dunelm Group PLC is trading at a Price to Book ratio of 12.81 based on book value at the latest fiscal year end. This ratio is above the historically observed median of 11.35, while high and low observations have been 19.65 and 7.54.

Free Cash Flow Yield %



Dunelm Group PLC has a Free Cash Flow Yield of 4.69% based on free cash flow generated during the latest fiscal year. This value is above the historically observed median yield of 4.63%, while high and low observations have been 8.20 and 2.61.

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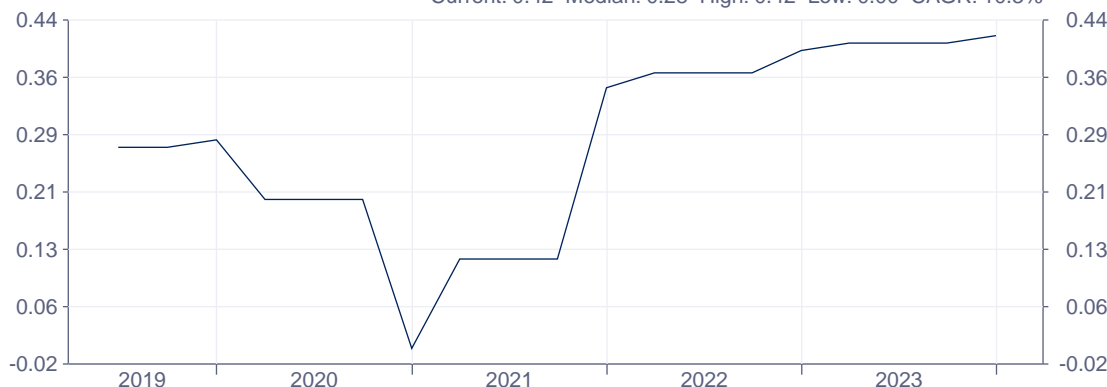
Dividends Data

Dividends Per Share TTM		0.43	Payout Ratio TTM %		56.75%	Dividend Yield TTM %		3.79%
Rate	Ex Date	Record Date	Payment Date	Currency	Note			
0.160	14-03-2024	15-03-2024	09-04-2024	GBP				
0.270	26-10-2023	27-10-2023	20-11-2023	GBP				
0.150	16-03-2023	17-03-2023	11-04-2023	GBP				
0.260	10-11-2022	11-11-2022	05-12-2022	GBP				
0.140	17-03-2022	18-03-2022	08-04-2022	GBP				
0.230	28-10-2021	29-10-2021	19-11-2021	GBP				
0.120	18-03-2021	19-03-2021	09-04-2021	GBP				
0.205	31-10-2019	01-11-2019	22-11-2019	GBP				
0.075	14-03-2019	15-03-2019	12-04-2019	GBP				
0.195	15-11-2018	16-11-2018	07-12-2018	GBP				

Dividend Growth and Yield

Dividends Per Share TTM

Current: 0.42 Median: 0.28 High: 0.42 Low: 0.00 CAGR: 10.3%



Dunelm Group PLC's trailing 12-month dividend per share is 0.42 and its dividend has grown at a cumulative annualized rate of 10.3% over the charted period. This compares to dividend growth of 4.90% over the past year and cumulative annualized growth of 53.00% over the past 3 years.

Dividend Yield TTM %

Current: 3.79 Median: 3.09 High: 5.46 Low: 0.00 CAGR: 4.4%



Dunelm Group PLC's current dividend yield is 3.79% based on trailing 12 month dividends. The current yield is above the historically observed median of 3.09% and, over the charted time period, the observed high yield has been 5.46% and the observed low yield has been 0.00%.

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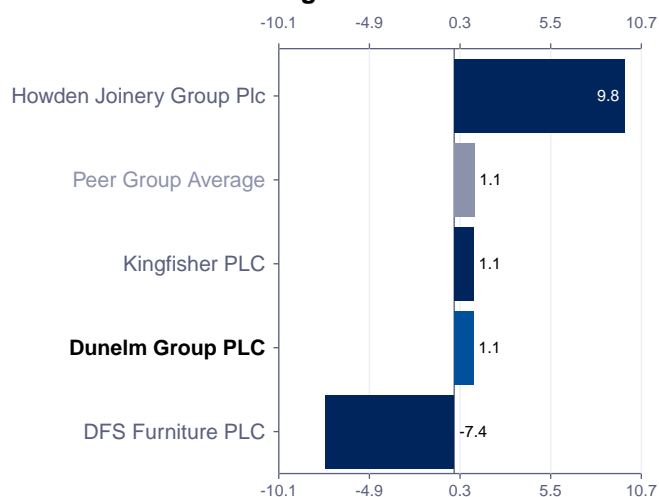
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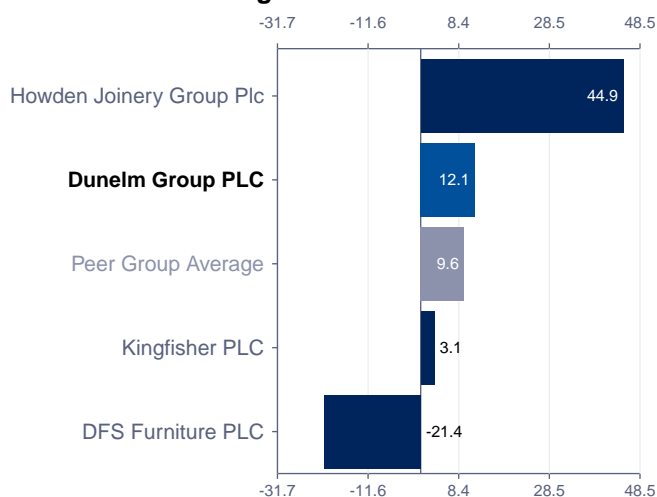
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ICB Subsector Peer Comparisons

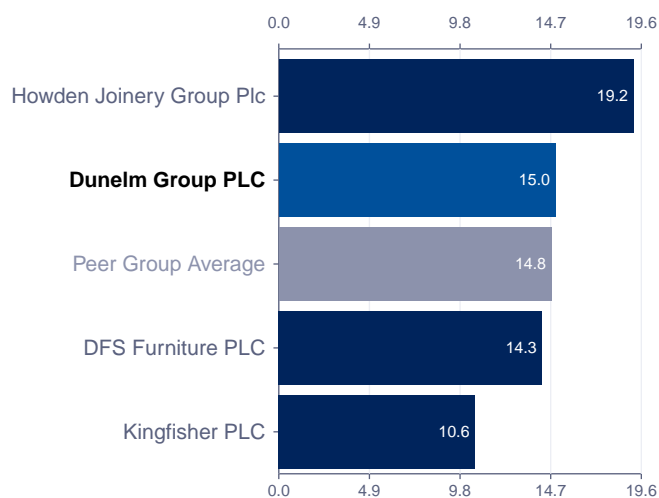
Price Change Year to Date %



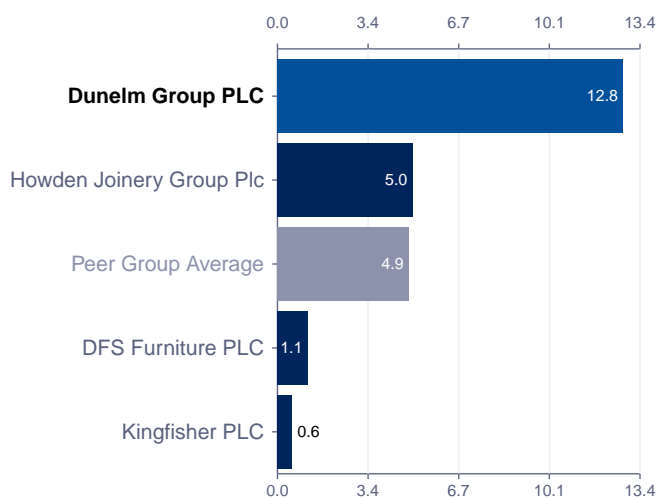
Price Change Last Calendar Year %



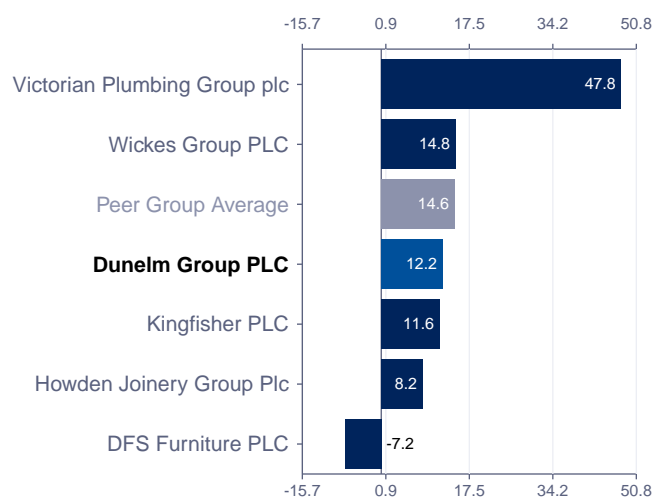
Price / EPS TTM



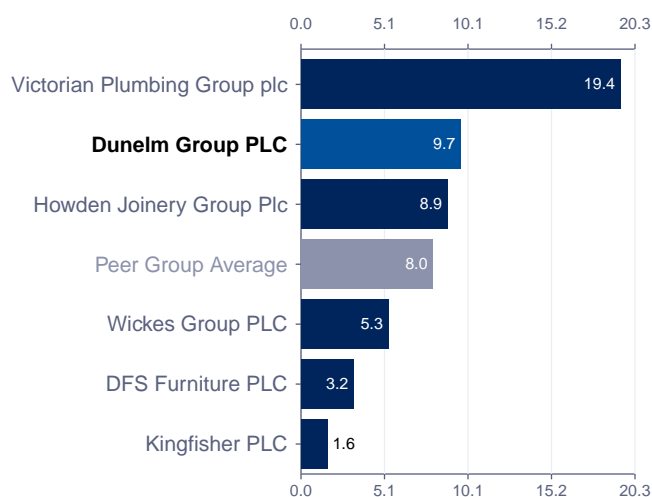
Price / Book Value



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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