

RS Group Plc (RS1:LN)



London
Stock Exchange

Industrials/Industrial Suppliers

Price: 708.00

Report Date: April 25, 2024

Business Description and Key Statistics

RS Group plc is a United Kingdom-based company, which is a global omni-channel provider of product and service solutions for designers, builders and maintainers of industrial equipment and operations. The Company's segments include EMEA, Americas and Asia Pacific. It stocks more than 750,000 industrial and electronic products, sourced from over 2,500 suppliers, and provides a range of product and service solutions to customers. Its product solutions include automation and control; mechanical and fluid power; electronics; maintenance, and safety and protection. Its service solutions include design solutions, customer order solutions, procurement solutions, inventory solutions, maintenance solutions, safety solutions, integrated supply solutions and ESG solutions. RS PRO is its own-brand product range. Its OKdo brand is a technology solutions business focused on single-board computing (SBC), Internet of Things (IoT) and education. Better World is its sustainable product range.

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

ICB Industry: Industrials

ICB Subsector: Industrial Suppliers

Address: Fifth Floor, Two Pancras Square
LONDON N1C 4AG
GBR

Employees: 8,768

	Current	YTY % Chg
Revenue LFY (M)	2,982	6.0
EPS Diluted LFY	0.60	-13.1
Market Value (M)	3,352	
Shares Outstanding LFY (000)	473,450	
Book Value Per Share	2.95	
EBITDA Margin %	12.50	
Net Margin %	7.9	
Long-Term Debt / Capital %	29.5	
Dividends and Yield TTM	0.22 - 3.11%	
Payout Ratio TTM %	41.9	
60-Day Average Volume (000)	1,336	
52-Week High & Low	921.40 - 660.40	
Price / 52-Week High & Low	0.77 - 1.07	

Price, Moving Averages & Volume



RS Group Plc is currently trading at 708.00 which is 3.5% below its 50 day moving average price of 734.04 and 5.2% below its 200 day moving average price of 746.53.

RS1:LN is currently 23.2% below its 52-week high price of 921.40 and is 7.2% above its 52-week low price of 660.40. Over the past 52-weeks, RS1:LN is down 21.0% while on a calendar year-to-date basis it is down 13.6%.

The Relative Strength Index (RSI) indicator for RS1:LN is currently 46.5. 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 %	-0.21	-0.54	50-Day Average Price	734.04
1-Week %	1.00	-1.32	Price / 50-Day Average	0.96
4-Week %	-3.52	-5.00	200-Day Average Price	746.53
52-Week %	-20.96	-23.73	Price / 200-Day Average	0.95
Quarter-to-Date %	-2.59	-3.76	RSI - Relative Strength Index	46.50
Year-to-Date %	-13.62	-17.39	Risk Metrics	
Last Month %	-3.56	-7.81	Price Volatility	12.34
Last Quarter %	-11.32	-13.89	Sharpe Ratio	0.04
Last Calendar Year %	-8.48	-12.36	Sortino Ratio	0.07

5-Year Price Performance vs. FTSE 350

RS Group Plc
FTSE 350 Index

Current: 1.10 CAGR: 2.0%
Current: 1.08 CAGR: 1.6%



Over the past five years, RS Group Plc's stock price is up 10.3% which is 2.2% above the FTSE 350 Index performance of 8.1% over the same period. RS Group Plc's cumulative annualized growth rate (CAGR) over the five year period has been 2.0% while that of the FTSE 350 Index has been 1.6%.

Over the past year, RS Group Plc's stock price performance of -21.0% has underperformed that of the FTSE 350 Index by 23.7%. On a year-to-date basis, RS Group Plc's stock price performance of -13.6% has underperformed the FTSE 350 Index by 17.4%.

Over the past week, RS Group Plc's stock price performance of 1.0% has underperformed that of the FTSE 350 Index by 1.3%.

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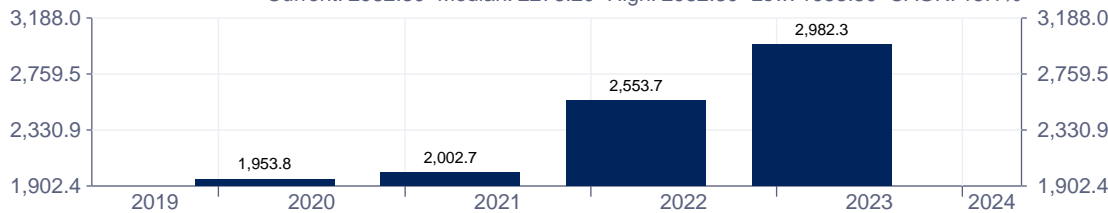
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Growth and Profitability Metrics

Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %	16.4	10.6	8.9	Gross Margin %	44.5	44.0	44.1
Revenues Per Share %	14.3	9.3	8.1	EBITDA Margin %	12.5	12.1	10.5
EBITDA %	22.7	12.6	12.3	Pre-Tax Margin %	10.6	10.5	9.0
EPS Diluted %	19.8	9.9	12.5	Net Margin %	7.9	8.1	6.8
Free Cash Flow %	3.8	6.4	9.8	Return on Equity %	17.6	21.4	21.3
Cash from Operations %	1.8	8.3	9.2	Return on Capital %	14.3	17.7	16.8
Book Value %	20.5	18.8	13.6	Return on Assets %	8.9	10.2	9.3

Revenue (M)

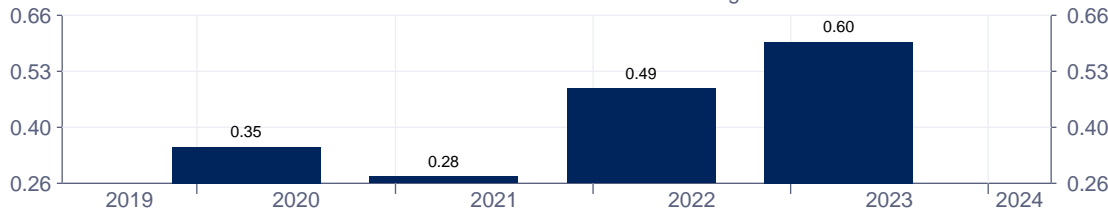
Current: 2982.30 Median: 2278.20 High: 2982.30 Low: 1953.80 CAGR: 15.1%



RS Group Plc's cumulative annualized revenue growth rate over the charted period is 15.1%. This compares to cumulative annualized growth of 16.4% over the past 3 years.

EPS Diluted

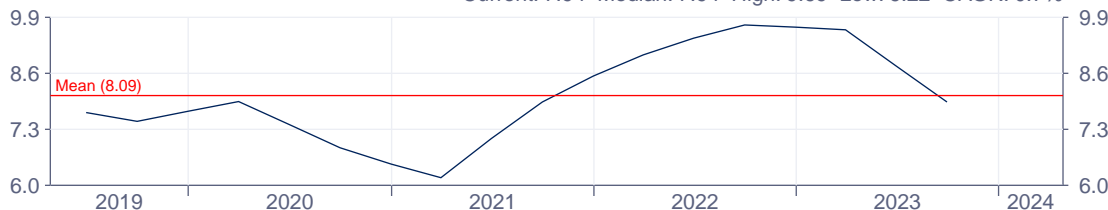
Current: 0.60 Median: 0.42 High: 0.60 Low: 0.28 CAGR: 19.7%



RS Group Plc's cumulative annualized EPS growth rate over the charted period is 19.7%. This compares to cumulative annualized growth of 19.8% over the past 3 years.

Net Profit Margin %

Current: 7.94 Median: 7.94 High: 9.69 Low: 6.22 CAGR: 0.7%



RS Group Plc's net profit margin of 7.9% is 0.1% below the period's mean net margin of 8.1%. During the charted period, the observed net profit margin high and low were 9.7% and 6.2% respectively.

Return on Equity %

Current: 17.60 Median: 22.45 High: 25.80 Low: 16.00 CAGR: -8.6%



RS Group Plc's return on equity of 17.6% is 3.8% below the period's mean return on equity of 21.4%. During the charted period, the observed ROE high and low were 25.8% and 16.0% respectively.

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Valuation Metrics

	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	14.2	19.3	20.5	Earnings Yield %	6.33	5.14	4.82
Price / Sales	1.1	1.6	1.5	Free Cash Flow Yield %	2.53	1.76	2.03
Price / Operating Cash Flow	12.3	17.0	17.5	Dividend Yield %	3.11	2.04	2.27
Price / Book Value	2.4	4.3	4.3	Enterprise Value / EBITDA	9.6	13.2	14.0

Price / EPS TTM



RS Group Plc is trading at 14.20 times its EPS generated during the latest fiscal year. This multiple is below the historically observed median of 19.30, while high and low observations have been 39.93 and 12.59.

Price / Sales



RS Group Plc is trading at a Price to Sales ratio of 1.13 based on sales generated during the latest fiscal year. This ratio is below the historically observed median ratio of 1.57, while high and low observations have been 2.51 and 1.06.

Price / Book Value



RS Group Plc is trading at a Price to Book ratio of 2.40 based on book value at the latest fiscal year end. This ratio is below the historically observed median of 4.29, while high and low observations have been 6.05 and 2.26.

Free Cash Flow Yield %



RS Group Plc has a Free Cash Flow Yield of 2.53% based on free cash flow generated during the latest fiscal year. This value is above the historically observed median yield of 1.77%, while high and low observations have been 3.62 and 0.86.

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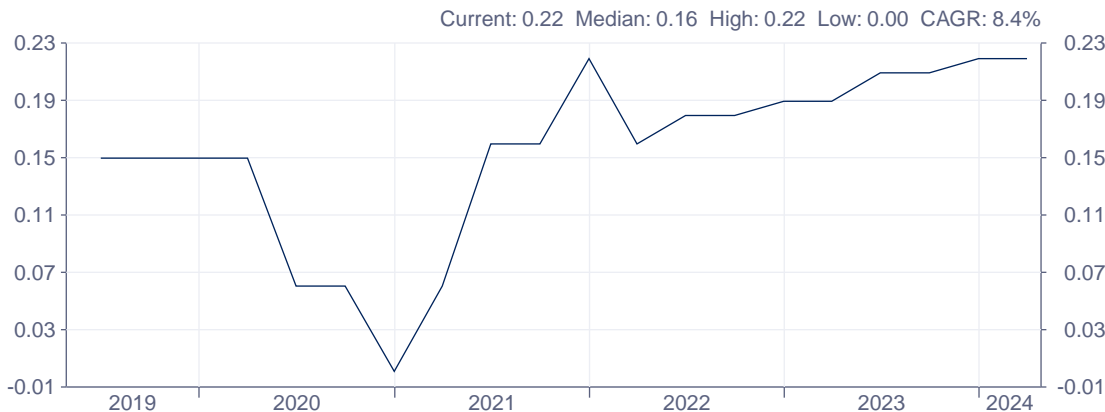
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Dividends Data

Dividends Per Share TTM		0.22	Payout Ratio TTM %		41.92%	Dividend Yield TTM %		3.11%
Rate	Ex Date	Record Date	Payment Date	Currency	Note			
0.083	23-11-2023	24-11-2023	05-01-2024	GBP				
0.137	15-06-2023	16-06-2023	21-07-2023	GBP				
0.072	24-11-2022	25-11-2022	06-01-2023	GBP				
0.116	16-06-2022	17-06-2022	22-07-2022	GBP				
0.064	25-11-2021	26-11-2021	07-01-2022	GBP				
0.098	17-06-2021	18-06-2021	23-07-2021	GBP				
0.061	07-01-2021	08-01-2021	29-01-2021	GBP				
0.059	28-11-2019	29-11-2019	08-01-2020	GBP				
0.095	13-06-2019	14-06-2019	25-07-2019	GBP				
0.053	29-11-2018	30-11-2018	09-01-2019	GBP				
0.080	14-06-2018	15-06-2018	25-07-2018	GBP				

Dividend Growth and Yield

Dividends Per Share TTM



RS Group Plc's trailing 12-month dividend per share is 0.22 and its dividend has grown at a cumulative annualized rate of 8.4% over the charted period. This compares to dividend growth of 17.00% over the past year and cumulative annualized growth of 53.40% over the past 3 years.

Dividend Yield TTM %



RS Group Plc's current dividend yield is 3.11% based on trailing 12 month dividends. The current yield is above the historically observed median of 2.04% and, over the charted time period, the observed high yield has been 3.27% and the observed low yield has been 0.00%.

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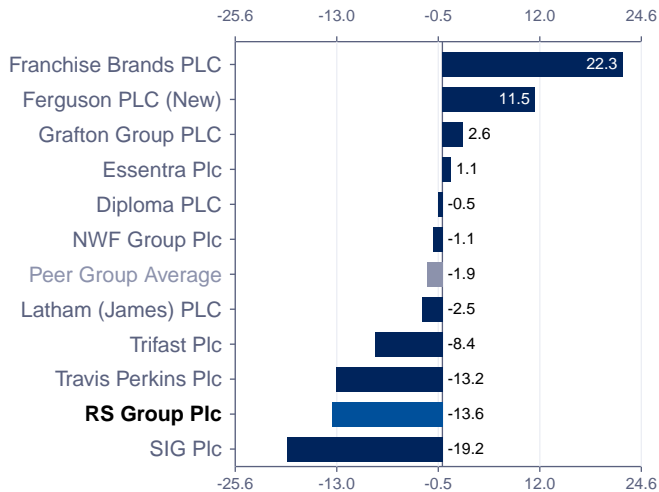
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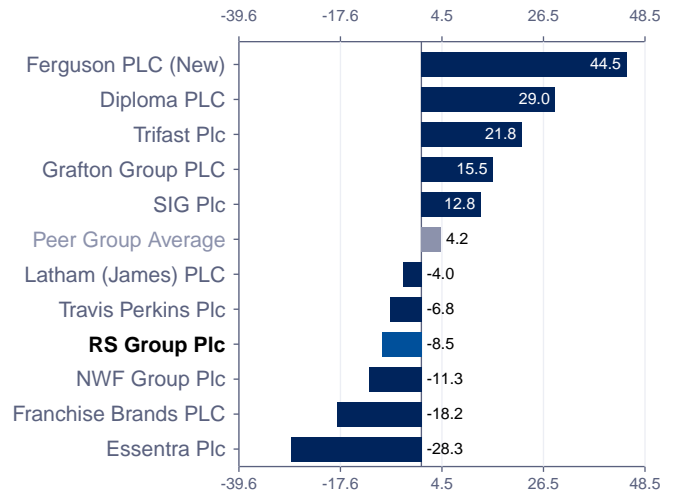
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ICB Subsector Peer Comparisons

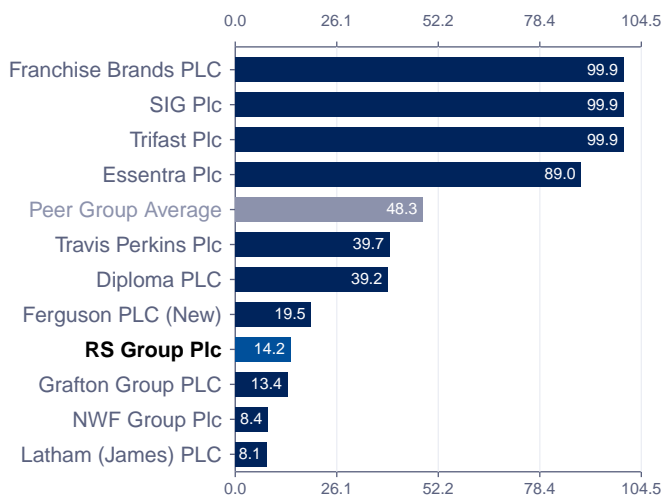
Price Change Year to Date %



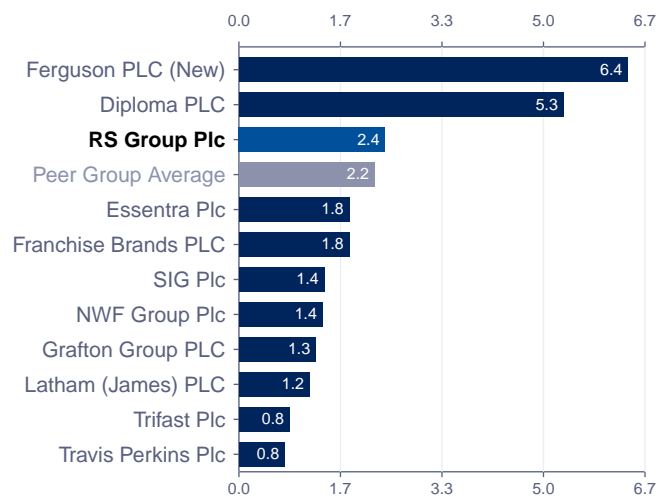
Price Change Last Calendar Year %



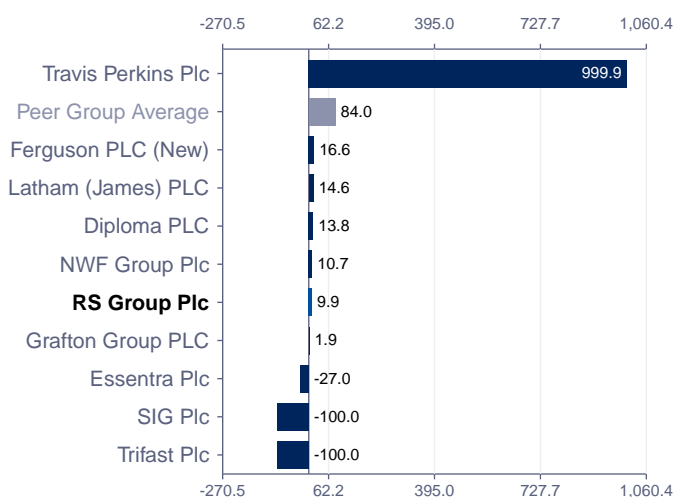
Price / EPS TTM



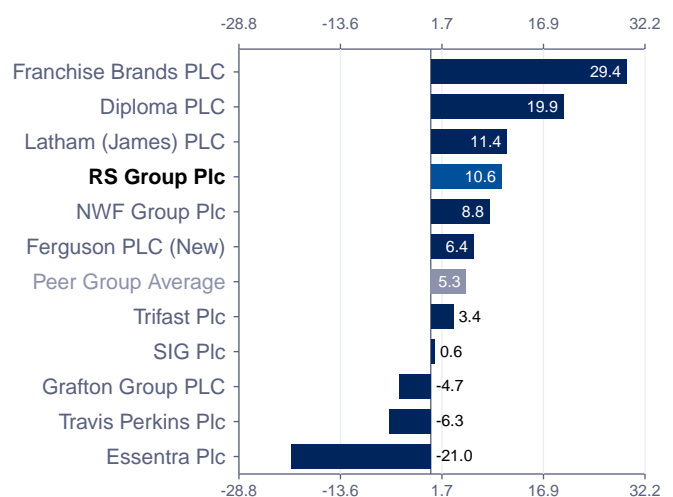
Price / Book Value



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 $RS = (total\ gains / n) / (total\ losses / n)$ 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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