

Glanbia Plc (Ireland) (GLB:LN)



Consumer Staples/Food Products

Price: 17.50

Report Date: April 24, 2024

Business Description and Key Statistics

Glanbia plc is an Ireland-based nutrition company. The Company's segments include Glanbia Performance Nutrition and Glanbia Nutritionals. The Glanbia Performance Nutrition segment manufactures and sells sports nutrition and lifestyle nutrition products through a variety of channels including specialty retail, online, Food, Drug, Mass, Club (FDMC), and gyms in a variety of formats, including powders, ready-to-eat (bars and snacking foods) and ready-to-drink beverages. The Glanbia Nutritionals segment manufactures and sells cheese, dairy and non-dairy nutritional and functional ingredients, and vitamin and mineral premixes targeting the increased market focus on health and nutrition. Its subsidiaries include Alanfield Society Limited, Glanbia Finance International Designated Activity Company, Glanbia Financial Services Unlimited Company, Glanbia GNPN Holding Limited, Glanbia Holdfin Limited, and Glanbia Investchip Limited.

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

ICB Industry: Consumer Staples

ICB Subsector: Food Products

Address: Glanbia House, Ring Road
KILKENNY
IRL

Employees: 5,534

	Current	YTY % Chg
Revenue LFY (M)	5,425	-8.6
EPS Diluted LFY	1.27	69.2
Market Value (M)	4,639	
Shares Outstanding LFY (000)	265,072	
Book Value Per Share	8.05	
EBITDA Margin %	7.70	
Net Margin %	6.4	
Long-Term Debt / Capital %		
Dividends and Yield TTM	0.35 - 2.02%	
Payout Ratio TTM %	25.7	
60-Day Average Volume (000)	89	
52-Week High & Low	18.10 - 13.08	
Price / 52-Week High & Low	0.97 - 1.34	

Price, Moving Averages & Volume



Glanbia Plc (Ireland) is currently trading at 17.50 which is 2.3% above its 50 day moving average price of 17.10 and 13.1% above its 200 day moving average price of 15.47.

GLB:LN is currently 3.3% below its 52-week high price of 18.10 and is 33.8% above its 52-week low price of 13.08. Over the past 52-weeks, GLB:LN is up 28.3% while on a calendar year-to-date basis it is up 22.4%.

The Relative Strength Index (RSI) indicator for GLB:LN is currently 51.61. 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 %	0.00	0.10	50-Day Average Price	17.10
1-Week %	3.55	1.17	Price / 50-Day Average	1.02
4-Week %	-1.13	-2.54	200-Day Average Price	15.47
52-Week %	28.30	26.30	Price / 200-Day Average	1.13
Quarter-to-Date %	-2.34	-3.17	RSI - Relative Strength Index	51.61
Year-to-Date %	22.38	18.95	Risk Metrics	
Last Month %	6.60	2.35	Price Volatility	0.35
Last Quarter %	25.31	22.74	Sharpe Ratio	0.04
Last Calendar Year %	23.01	19.13	Sortino Ratio	0.08

5-Year Price Performance vs. FTSE 350

Glanbia Plc (Ireland)
FTSE 350 Index

Current: 1.07 CAGR: 1.3%
Current: 1.07 CAGR: 1.4%



Over the past five years, Glanbia Plc (Ireland)'s stock price is up 6.9% which is 0.2% below the FTSE 350 Index performance of 7.1% over the same period. Glanbia Plc (Ireland)'s cumulative annualized growth rate (CAGR) over the five year period has been 1.3% while that of the FTSE 350 Index has been 1.4%.

Over the past year, Glanbia Plc (Ireland)'s stock price performance of 28.3% has outperformed that of the FTSE 350 Index by 26.3%. On a year-to-date basis, Glanbia Plc (Ireland)'s stock price performance of 22.4% has outperformed the FTSE 350 Index by 19.0%.

Over the past week, Glanbia Plc (Ireland)'s stock price performance of 3.6% has outperformed that of the FTSE 350 Index by 1.2%.

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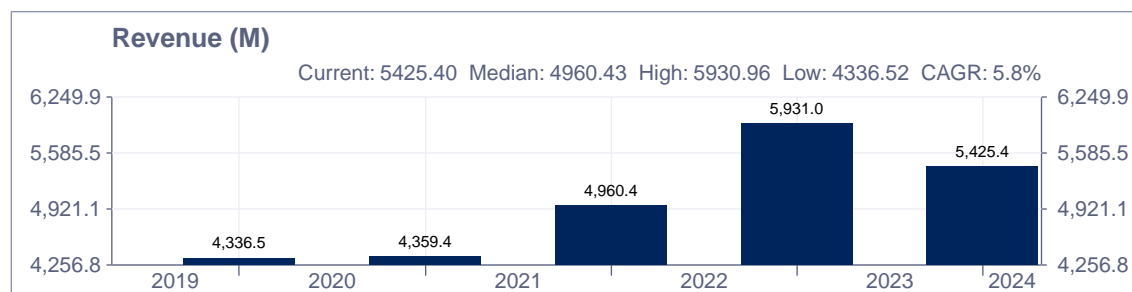
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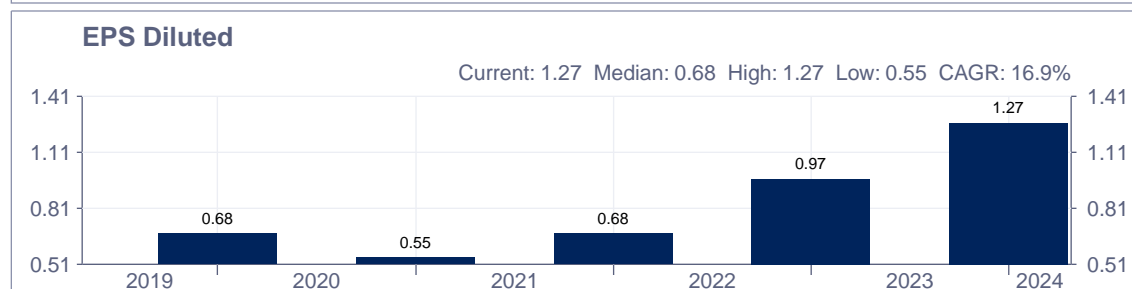
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Growth and Profitability Metrics

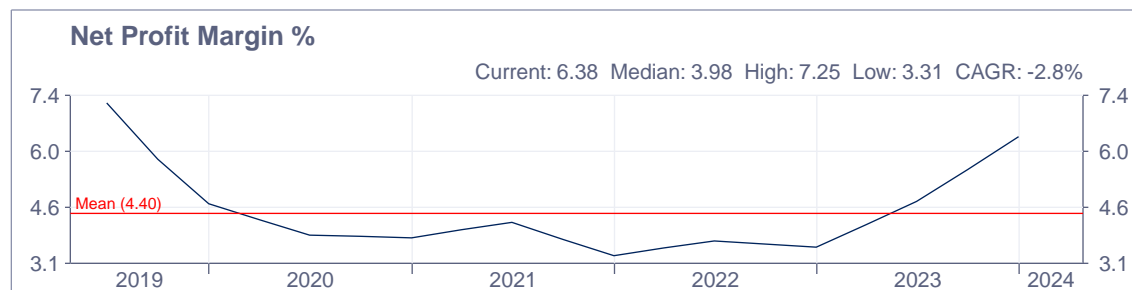
Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %	7.5	14.0	5.5	Gross Margin %	20.7	19.3	25.8
Revenues Per Share %	11.1	16.5	6.7	EBITDA Margin %	7.7	6.7	8.5
EBITDA %	18.9	4.5	5.1	Pre-Tax Margin %	7.2	4.9	6.8
EPS Diluted %	32.4	6.9	6.7	Net Margin %	6.4	4.4	5.9
Free Cash Flow %	17.2	9.4	72.1	Return on Equity %	16.6	10.9	14.5
Cash from Operations %	10.6	5.7	11.6	Return on Capital %			
Book Value %	6.3	5.5	10.6	Return on Assets %	8.8	5.5	6.7



Glanbia Plc (Ireland)'s cumulative annualized revenue growth rate over the charted period is 5.8%. This compares to cumulative annualized growth of 7.5% over the past 3 years.



Glanbia Plc (Ireland)'s cumulative annualized EPS growth rate over the charted period is 16.9%. This compares to cumulative annualized growth of 32.4% over the past 3 years.



Glanbia Plc (Ireland)'s net profit margin of 6.4% is 2.0% above the period's mean net margin of 4.4%. During the charted period, the observed net profit margin high and low were 7.3% and 3.3% respectively.



Glanbia Plc (Ireland)'s return on equity of 16.6% is 5.7% above the period's mean return on equity of 10.9%. During the charted period, the observed ROE high and low were 16.6% and 8.3% respectively.

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Valuation Metrics

	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	13.4	15.7	18.6	Earnings Yield %	7.44	6.35	5.38
Price / Sales	0.9	0.7	1.0	Free Cash Flow Yield %	3.81	3.73	2.29
Price / Operating Cash Flow	11.1	11.9	14.6	Dividend Yield %	2.02	2.35	1.63
Price / Book Value	2.2	1.8	2.4	Enterprise Value / EBITDA	10.2	9.9	12.4



Glanbia Plc (Ireland) is trading at 13.43 times its EPS generated during the latest fiscal year. This multiple is below the historically observed median of 15.75, while high and low observations have been 23.12 and 10.90.



Glanbia Plc (Ireland) is trading at a Price to Sales ratio of 0.86 based on sales generated during the latest fiscal year. This ratio is above the historically observed median ratio of 0.71, while high and low observations have been 1.54 and 0.50.



Glanbia Plc (Ireland) is trading at a Price to Book ratio of 2.18 based on book value at the latest fiscal year end. This ratio is above the historically observed median of 1.75, while high and low observations have been 2.63 and 1.19.



Glanbia Plc (Ireland) has a Free Cash Flow Yield of 3.81% based on free cash flow generated during the latest fiscal year. This value is above the historically observed median yield of 3.73%, while high and low observations have been 5.09 and 0.66.

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Dividends Data

Dividends Per Share TTM		0.35	Payout Ratio TTM %		25.72%	Dividend Yield TTM %		2.02%
Rate	Ex Date	Record Date	Payment Date	Currency	Note			
0.212	21-03-2024	22-03-2024	03-05-2024	EUR				
0.142	24-08-2023	25-08-2023	06-10-2023	EUR				
0.193	23-03-2023	24-03-2023	05-05-2023	EUR				
0.129	25-08-2022	26-08-2022	07-10-2022	EUR				
0.175	24-03-2022	25-03-2022	06-05-2022	EUR				
0.118	19-08-2021	20-08-2021	01-10-2021	EUR				
0.159	25-03-2021	26-03-2021	07-05-2021	EUR				
0.107	20-08-2020	21-08-2020	02-10-2020	EUR				
0.159	12-03-2020	13-03-2020	24-04-2020	EUR				
0.107	22-08-2019	23-08-2019	04-10-2019	EUR				
0.145	14-03-2019	15-03-2019	26-04-2019	EUR				
0.097	23-08-2018	24-08-2018	05-10-2018	EUR				

Dividend Growth and Yield

Dividends Per Share TTM



Glanbia Plc (Ireland)'s trailing 12-month dividend per share is 0.35 and its dividend has grown at a cumulative annualized rate of 8.3% over the charted period. This compares to dividend growth of 10.00% over the past year and cumulative annualized growth of 10.00% over the past 3 years.

Dividend Yield TTM %



Glanbia Plc (Ireland)'s current dividend yield is 2.02% based on trailing 12 month dividends. The current yield is below the historically observed median of 2.36% and, over the charted time period, the observed high yield has been 3.43% and the observed low yield has been 1.48%.

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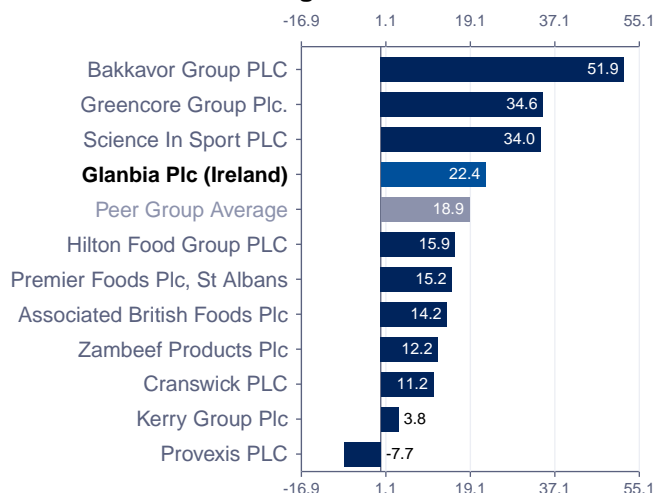
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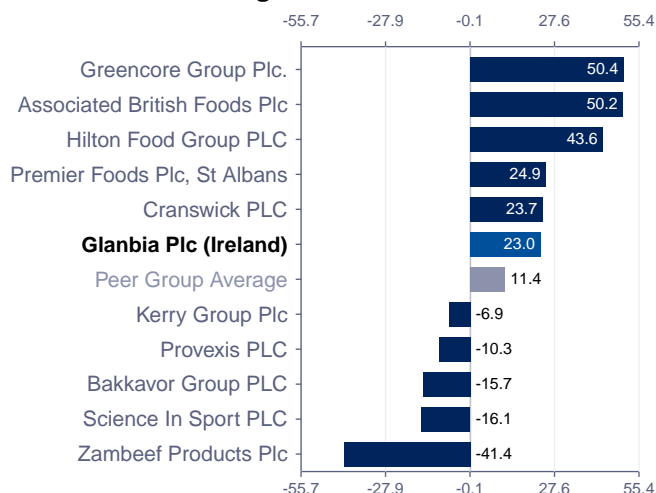
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ICB Subsector Peer Comparisons

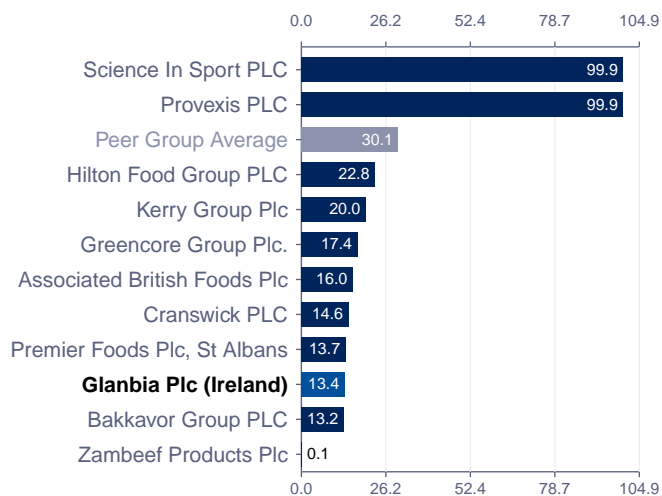
Price Change Year to Date %



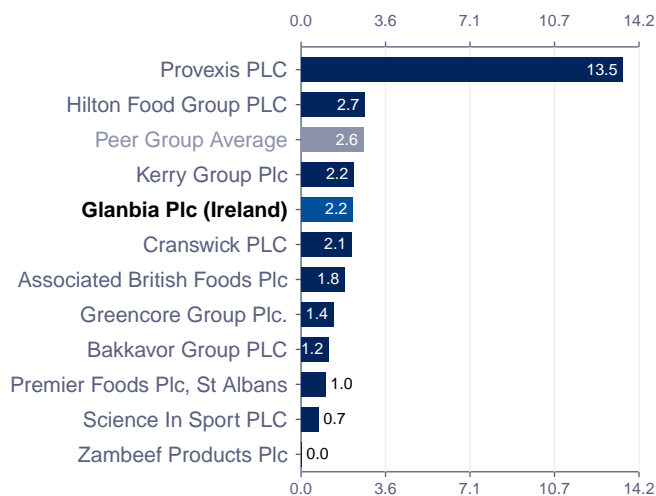
Price Change Last Calendar Year %



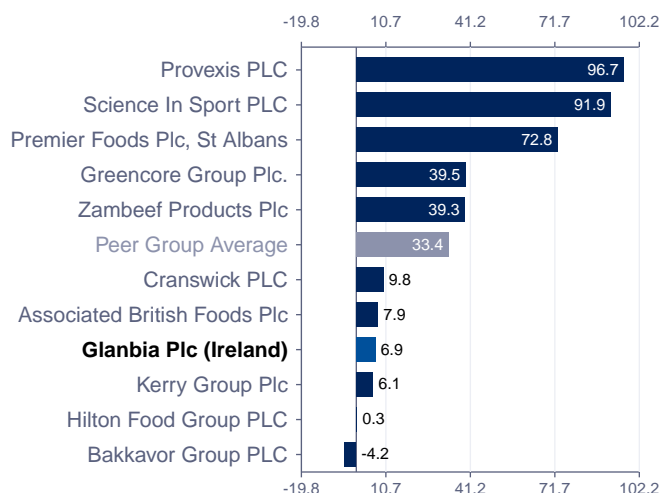
Price / EPS TTM



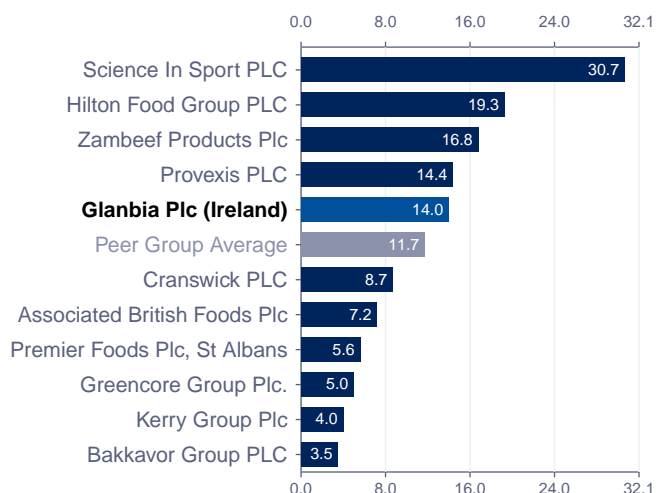
Price / Book Value



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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