

i3 Energy PLC (I3E:LN)



London
Stock Exchange

Energy/Oil: Crude Producers

Price: 10.90

Report Date: April 30, 2024

Business Description and Key Statistics

i3 Energy plc is a United Kingdom-based independent oil and gas company with assets and operations in the Western Canadian Sedimentary Basin and the United Kingdom North Sea. It operates in two segments: UK/Corporate and Canada. Its UK/Corporate segment activities include oil and gas exploration, appraisal and development on the United Kingdom continental Shelf (UKCS). Its operating areas include Serenity and Liberator/Minos High in United Kingdom North Sea. It holds license P.2358 in the Outer Moray Firth area of the UKCS which contains the Serenity field discovery. The license also contains the Liberator field discovery and the Minos High prospect. Its Canada segment includes oil and gas production in the Western Canadian Sedimentary Basin (WC). Its Canadian production asset base consists of approximately over 850 net conventional oil, natural gas and natural gas liquids production wells. Its key operating areas include Clearwater, central Alberta, Wapiti/Elmworth and Simonette.

Website: <https://i3.energy/>

ICB Industry: Energy

ICB Subsector: Oil: Crude Producers

Address: Westpoint House; Prospect Road, Arnhall business Park
WESTHILL AB32 6FJ

Employees: GBR
56

	Current	YTY % Chg
Revenue LFY (M)	146	-29.8
EPS Diluted LFY	1.24	-26.2
Market Value (M)	131	
Shares Outstanding LFY (000)	1,201,875	
Book Value Per Share	0.14	
EBITDA Margin %	42.80	
Net Margin %	21.7	
Long-Term Debt / Capital %	20.7	
Dividends and Yield TTM	0.01 - 7.84%	
Payout Ratio TTM %	54.4	
60-Day Average Volume (000)	3,178	
52-Week High & Low	18.92 - 8.58	
Price / 52-Week High & Low	0.58 - 1.27	

Price, Moving Averages & Volume



i3 Energy PLC is currently trading at 10.90 which is 4.4% above its 50 day moving average price of 10.44 and 3.3% below its 200 day moving average price of 11.27.

I3E:LN is currently 42.4% below its 52-week high price of 18.92 and is 27.0% above its 52-week low price of 8.58. Over the past 52-weeks, I3E:LN is down 42.0% while on a calendar year-to-date basis it is down 3.0%.

The Relative Strength Index (RSI) indicator for I3E:LN is currently 44.68. An RSI value of 70 and above is considered overbought and 30 and below oversold.

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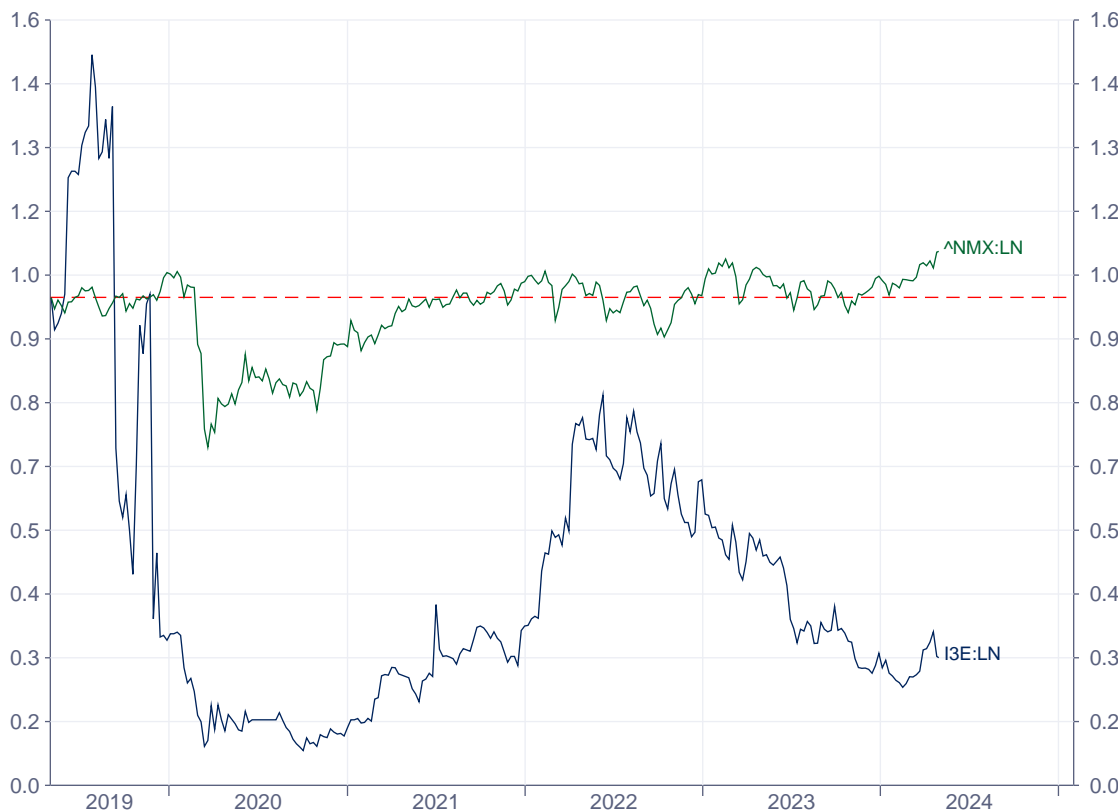
Price Performance, Technical Indicators & Risk Metrics

Price Performance	% Change	Difference vs FTSE 350	Technical Indicators	
1-Day %	1.30	1.41	50-Day Average Price	10.44
1-Week %	-13.90	-15.08	Price / 50-Day Average	1.04
4-Week %	-4.55	-7.00	200-Day Average Price	11.27
52-Week %	-41.96	-46.54	Price / 200-Day Average	0.97
Quarter-to-Date %	-5.22	-7.35	RSI - Relative Strength Index	44.68
Year-to-Date %	-3.02	-7.78	Risk Metrics	
Last Month %	-5.22	-7.35	Price Volatility	0.60
Last Quarter %	2.31	-0.26	Sharpe Ratio	0.03
Last Calendar Year %	-54.40	-58.28	Sortino Ratio	0.05

5-Year Price Performance vs. FTSE 350

i3 Energy PLC
FTSE 350 Index

Current: 0.28 CAGR: -22.4%
Current: 1.09 CAGR: 1.8%



Over the past five years, i3 Energy PLC's stock price is down 71.9% which is 81.0% below the FTSE 350 Index performance of 9.2% over the same period. i3 Energy PLC's cumulative annualized growth rate (CAGR) over the five year period has been -22.4% while that of the FTSE 350 Index has been 1.8%.

Over the past year, i3 Energy PLC's stock price performance of -42.0% has underperformed that of the FTSE 350 Index by 46.5%. On a year-to-date basis, i3 Energy PLC's stock price performance of -3.0% has underperformed the FTSE 350 Index by 7.8%.

Over the past week, i3 Energy PLC's stock price performance of -13.9% has underperformed that of the FTSE 350 Index by 15.1%.

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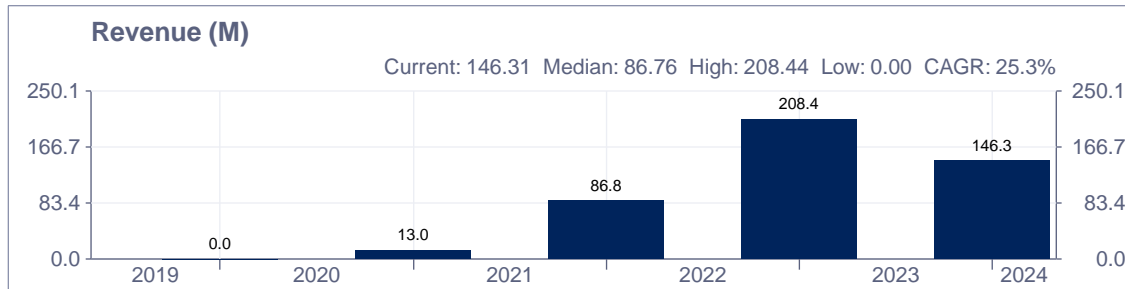
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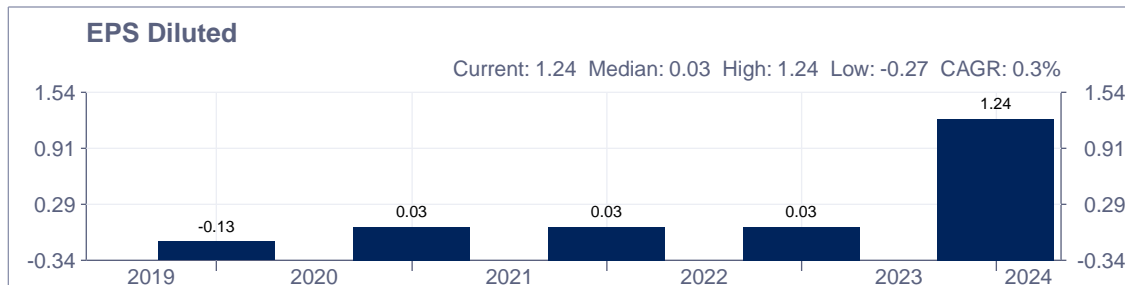
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Growth and Profitability Metrics

Historical Growth	3-Year	5-Year	10-Year	Profitability	Current	5-Year Average	10-Year Average
Revenues %				Gross Margin %	37.5		
Revenues Per Share %				EBITDA Margin %	42.8		
EBITDA %	999.9	999.9		Pre-Tax Margin %	14.3		
EPS Diluted %	999.9	999.9		Net Margin %	21.7		
Free Cash Flow %	62.2	72.2		Return on Equity %	23.7	-3.8	
Cash from Operations %	999.9	999.9		Return on Capital %	23.7	2.3	
Book Value %	9.1	3.8		Return on Assets %	11.6	-2.3	



i3 Energy PLC's cumulative annualized revenue growth rate over the charted period is 25.3%. This compares to cumulative annualized growth of % over the past 3 years.



i3 Energy PLC's cumulative annualized EPS growth rate over the charted period is 0.3%. This compares to cumulative annualized growth of 999.9% over the past 3 years.



i3 Energy PLC's net profit margin of 21.7% is 3.3% below the period's mean net margin of 25.0%. During the charted period, the observed net profit margin high and low were 61.8% and 0.7% respectively.



i3 Energy PLC's return on equity of 23.7% is 27.5% above the period's mean return on equity of -3.8%. During the charted period, the observed ROE high and low were 37.0% and -67.4% respectively.

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Valuation Metrics

	Current	5-Year Median	10-Year Median		Current	5-Year Median	10-Year Median
Price / EPS TTM	3.4	8.4		Earnings Yield %	31.72	10.73	
Price / Sales	0.9			Free Cash Flow Yield %	0.00	0.00	
Price / Operating Cash Flow	2.3	5.2		Dividend Yield %	7.84		
Price / Book Value	0.8	1.0		Enterprise Value / EBITDA	1.8	11.6	

Price / EPS TTM



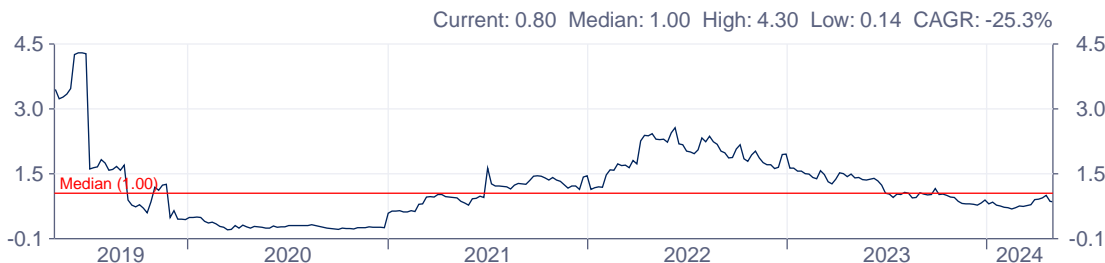
i3 Energy PLC is trading at 3.41 times its EPS generated during the latest fiscal year. This multiple is below the historically observed median of 8.40, while high and low observations have been 99.90 and 2.69.

Price / Sales



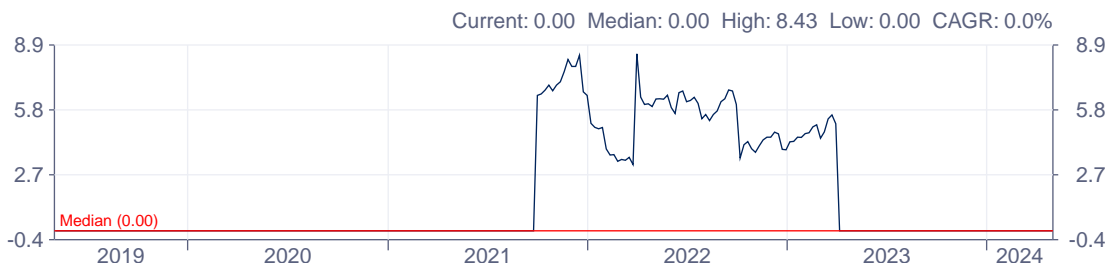
i3 Energy PLC is trading at a Price to Sales ratio of 0.92 based on sales generated during the latest fiscal year. This ratio is below the historically observed median ratio of 1.35, while high and low observations have been 4.37 and 0.73.

Price / Book Value



i3 Energy PLC is trading at a Price to Book ratio of 0.80 based on book value at the latest fiscal year end. This ratio is below the historically observed median of 1.00, while high and low observations have been 4.30 and 0.14.

Free Cash Flow Yield %



i3 Energy PLC has a Free Cash Flow Yield of 0.00% based on free cash flow generated during the latest fiscal year. This value is equal to the historically observed Free Cash Flow Yield of 0.00%, while high and low observations have been 8.43 and 0.00.

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Dividends Data

Dividends Per Share TTM	0.01	Payout Ratio TTM %	54.38%	Dividend Yield TTM %	7.84%
Rate	Ex Date	Record Date	Payment Date	Currency	Note
0.003	11-04-2024	12-04-2024	03-05-2024	GBP	
0.003	18-01-2024	19-01-2024	09-02-2024	GBP	
0.003	12-10-2023	13-10-2023	27-10-2023	GBP	
0.002	25-05-2023	26-05-2023	16-06-2023	GBP	
0.002	20-04-2023	21-04-2023	12-05-2023	GBP	
0.002	23-03-2023	24-03-2023	14-04-2023	GBP	
0.002	16-02-2023	17-02-2023	10-03-2023	GBP	
0.002	19-01-2023	20-01-2023	10-02-2023	GBP	
0.002	05-01-2023	06-01-2023	27-01-2023	GBP	
0.001	10-11-2022	11-11-2022	02-12-2022	GBP	
0.001	13-10-2022	14-10-2022	04-11-2022	GBP	
0.001	15-09-2022	16-09-2022	07-10-2022	GBP	

Dividend Growth and Yield

Dividends Per Share TTM

Current: 0.01 Median: 0.01 High: 0.02 Low: 0.01 CAGR: 0.0%



i3 Energy PLC's trailing 12-month dividend per share is 0.01 and its dividend has grown at a cumulative annualized rate of 0.0% over the charted period. This compares to dividend growth of -55.70% over the past year and cumulative annualized growth of % over the past 3 years.

Dividend Yield TTM %

Current: 7.84 Median: 9.96 High: 14.90 Low: 4.47 CAGR: 43.2%



i3 Energy PLC's current dividend yield is 7.84% based on trailing 12 month dividends. The current yield is below the historically observed median of 9.96% and, over the charted time period, the observed high yield has been 14.90% and the observed low yield has been 4.47%.

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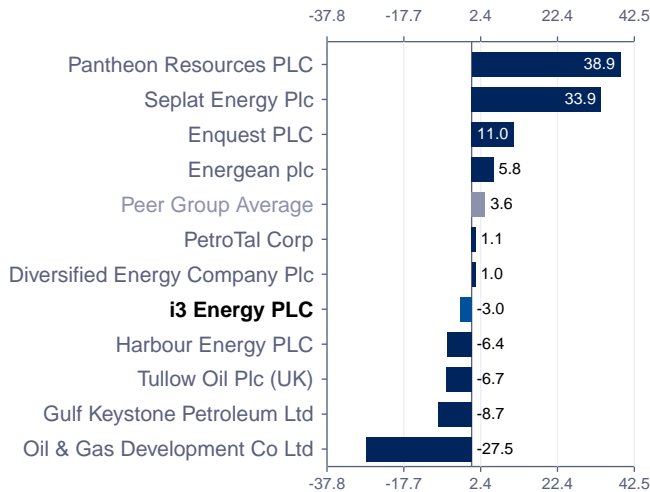
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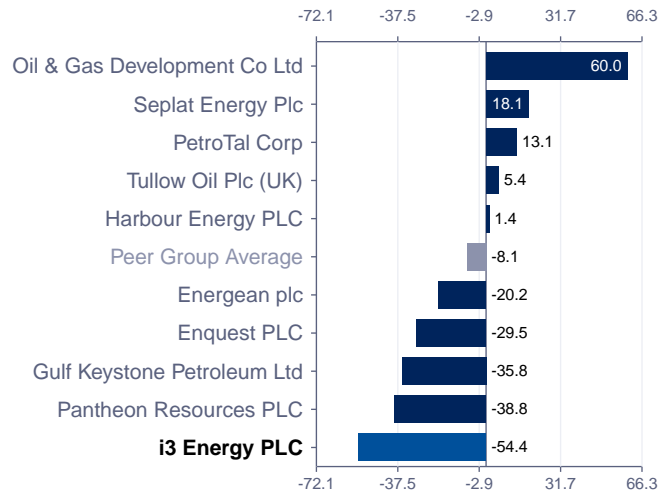
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ICB Subsector Peer Comparisons

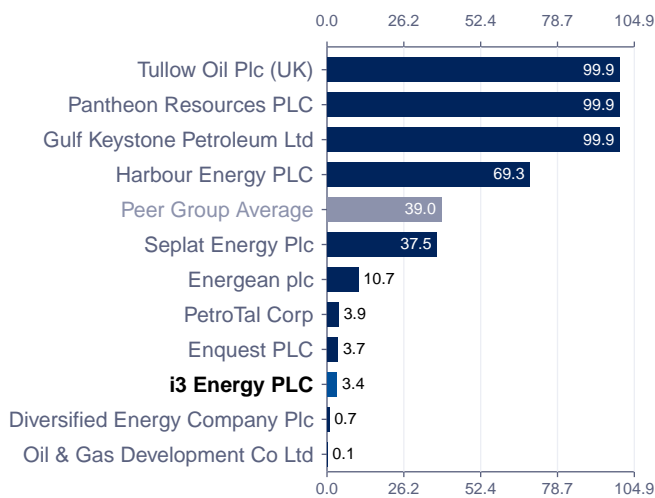
Price Change Year to Date %



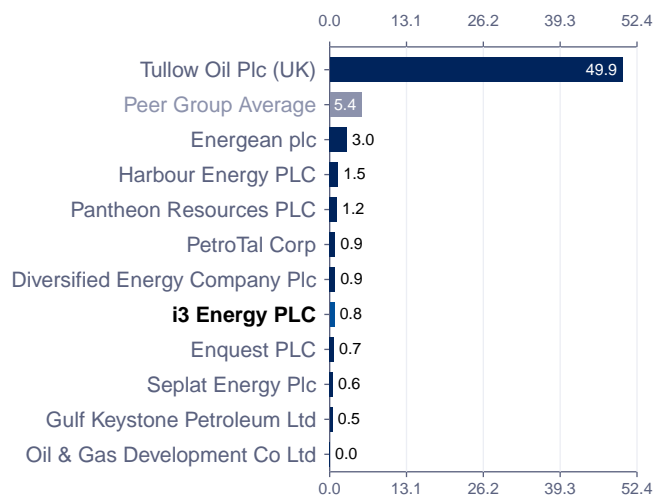
Price Change Last Calendar Year %



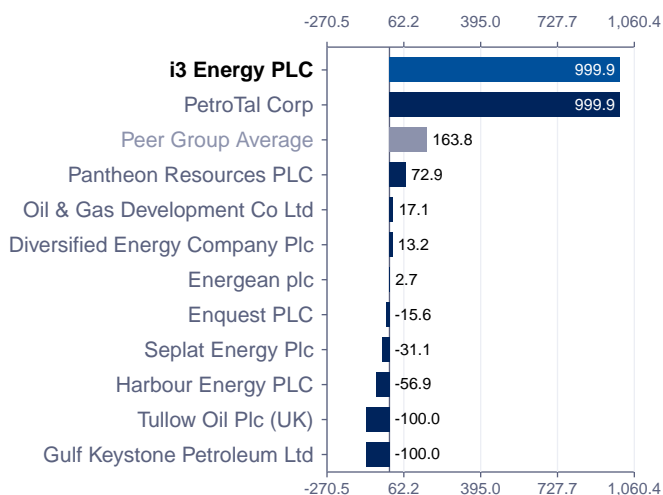
Price / EPS TTM



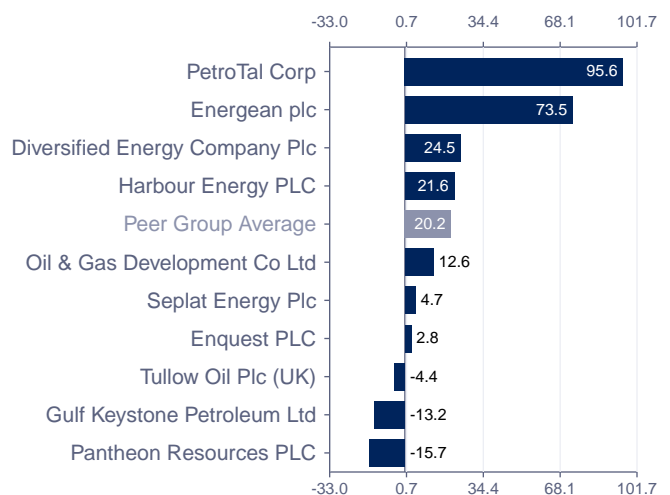
Price / Book Value



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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